



EAB

How to Survive Peak Advising Times

Best Practices for Managing Your Time and
Your Student Caseload During Registration

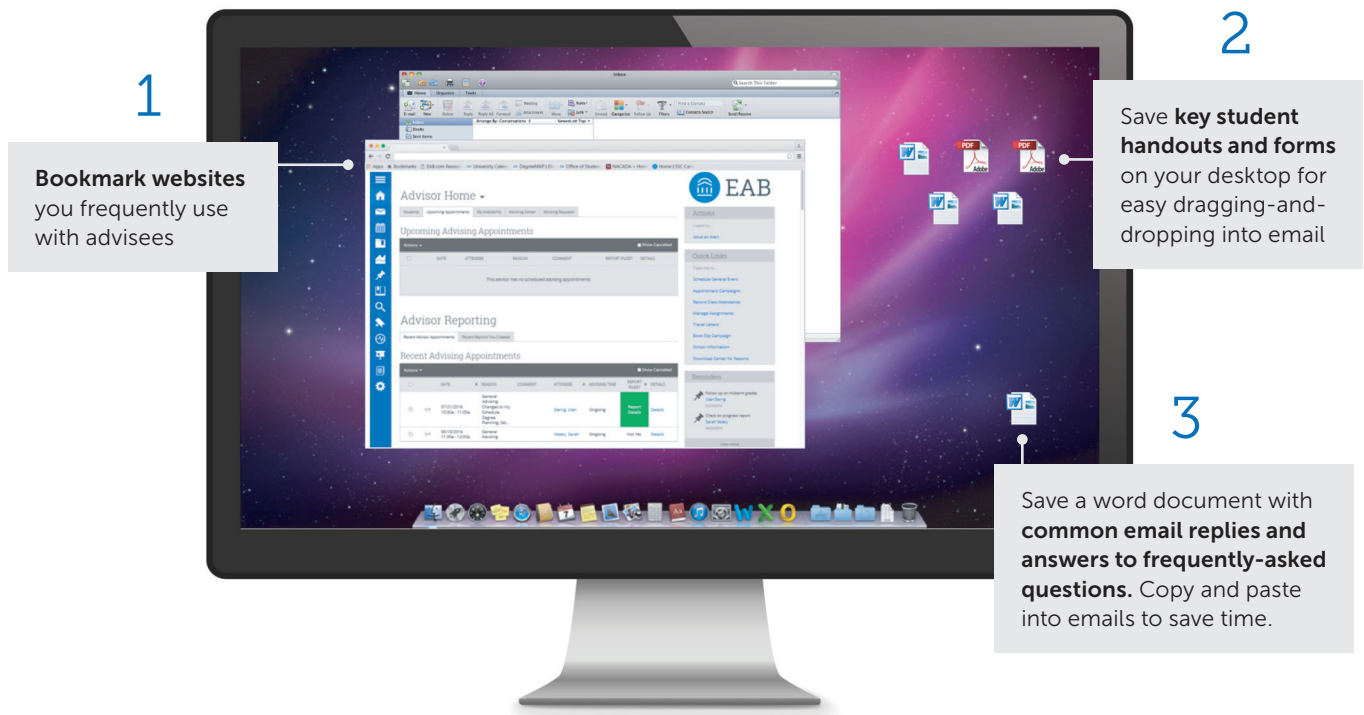
Proactive advising campaigns enable advisors and other student success staff and faculty to direct outreach to specific populations of students in need of supplemental attention. By putting a special focus on the students who they can help the most or with actionable next steps, advisors are able to maximize the overall impacts of their efforts.

Navigate, EAB's Student Success Management System, makes it easier to execute your campaigns with a suite of tools (analytics, workflow, and student engagement) to quickly identify, contact, and meet with students. By deploying Navigate to coordinate student care with stakeholders across campus, advisors can create highly-specific campaigns and ensure that no students fall through the cracks.

Mastering Inbox Essentials

Start with Your Desktop

Quick Tips to Save Time Year-Round



Put Your Signature to Work

Automatic Email Signatures Can Answer Common Questions So You Don't Have to

SAMPLE

John Lin

Success Coach

Whitehurst University Success Center

4455 East State Street.

[Find on a campus map.](#)

(202)555-5555

[Schedule an appointment.](#)



Important Links

Academic Calendar:

www.whitehurst.edu/academiccalendar

Advising Calendar Dates: www.whitehurst.edu/dates

Academic Standing: www.whitehurst.edu/academicregulations

Advising Policies and Procedures:

www.catalogue.whitehurst.edu/policies

Advising Syllabus: www.catalogue.whitehurst.edu/advising

SAMPLE

Best,

Amy Smith

Whitehurst Advisement Center

Jefferson Hall, 503

Office: (202) 555-5555

Direct: (202) 555-5555

What to know for Fall 2016 Registration (CURRENT STUDENTS):

- 1. Placement Exams-** If you need to take the math placement exam, keep checking your email as more instructions will follow in the next 1-2 weeks. For questions, call (202) 555-5555.
- 2. Your Registration Window-** Registration windows are determined by class and standing: www.whitehurst.edu/reg.
- 3. Registration Issues-** If you are trying to register and have a hold on your account or have a status error, please call the office of the registrar at (202) 555-5555 and request a status change. If you are getting a registration error or restriction, please call the department of that class.
- 4. Dropping a Class-** Follow this link and enter your Registration PIN: https://www.whitehurst.edu/reg/calendar_login.

Reduce Inbox Volume by "Playing Defense"

If You'll Never Want to Read It, Unsubscribe

15% of "deleted items" are from senders you should unsubscribe from



Would you ever want to read an email from this sender? If not, are they going to keep emailing you anyway? Unsubscribe.

If You Can't or Don't Want to Unsubscribe, Use "Rules"

FOR EXAMPLE

- Send professional newsletters to a "read later" folder
- Send manager's emails to a high-importance folder
- Flag emails from important people (or create a rule to format them differently)
- Automatically delete something you can't (or don't want to) unsubscribe from

▶ Click File > Manage Rules & Alerts > New Rule

Reduce Cognitive Load with an Inbox Management Strategy

Two Viable Inbox Management Strategies

1

Items: 0

Inbox Zero

- Keep as few items in your inbox as possible
- Archive messages you don't need to act on again in a single folder
- Delete messages you don't need
- Only retain messages you will need later

2

Items: 18,101

Inbox Unlimited

- Delete only junk mail
- Respond to relevant messages in the moment
- Use the search function to find old messages later
- Don't rely on folders or flags

Five Acceptable Actions for Email

Act on All Emails, Tackling Newest Messages First



Delete

If no action is needed, delete it or put it in your archive folder



Delegate

If someone else can respond, forward it to them



Respond

If you can respond in two minutes or less, do so



Do

If you can act on the email in two minutes less, do so



Defer

If responding would take more than two minutes, flag for follow-up



Already an EAB Navigate user?

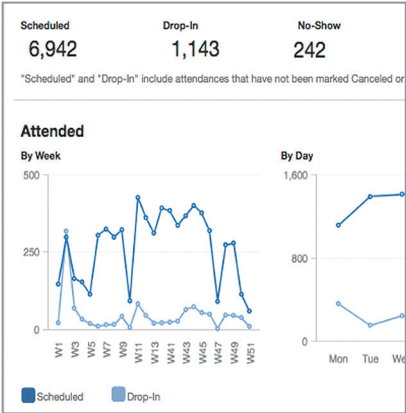
For more email templates and resources on effective student communications, visit: eab.com/StudentCommWebconference

How EAB Navigate Helps You Survive Peak Advising

1

Find Ways to Streamline Your Appointment Processes

Advisor Reports Can Reveal Trends to Help You Better Manage Appointments



SAMPLE TREND

High number of no-shows or cancellations at a specific time, ex. 9 a.m. to 10 a.m.

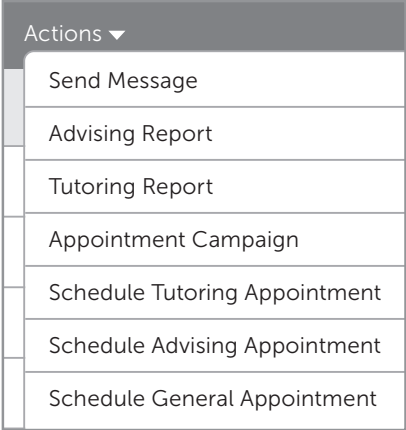
SOLUTION

Block off your calendar or adjust your availability; use that time for work other than appointments

2

Automate Daily Tasks

Actions, Email Sync, and Appointment Reminders Help Save Time on Every-Day Tasks

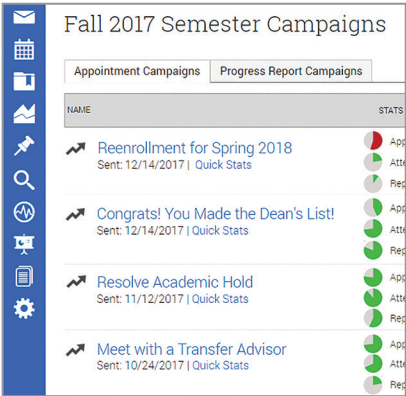


- The Actions drop-down contains a variety of mass operations you can perform for all students in a given list including sending a message or adding a note.
- Navigate syncs with Outlook and Gmail, so you can track at all email threads in one place. You can also configure automatic appointment reminders.

3

Proactively Free Up Time During Your Busiest Periods

Appointment Campaigns Can Help You Pull Forward Conversations and Activities



IDEAS

- Pull forward conversations that would otherwise need to happen during peak time, like mentoring conversations with low-risk students
- Proactively work to improve students' standing so that they aren't at risk during a time when you aren't able to provide as much support
- Help students declare a major or move to upper division

▶ **Already an EAB Navigate user?**

For more targeted campaign ideas and how-to guides, visit: eab.com/SSCCampaignIdeas

