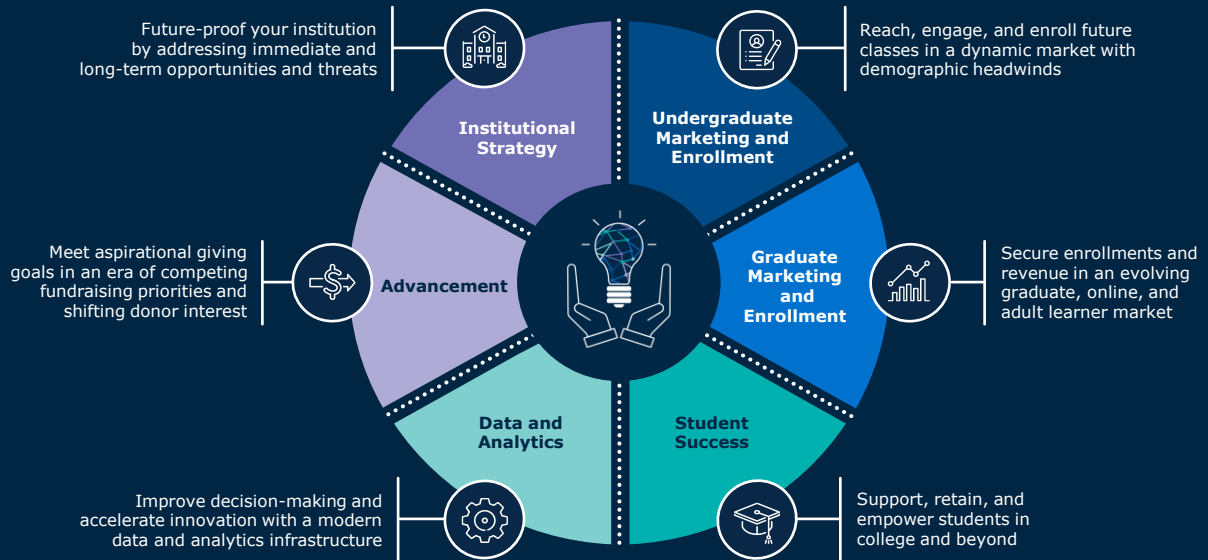




From Reactive to Ready

How to Build a Proactive Student Success Strategy for 2026

Insight-powered Solutions for Your Top Priorities and Toughest Challenges



We partner with **2,800+** institutions to accelerate progress, deliver results, and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.

Today's Presenters



Joanie Garcia

*Strategic Leader,
Student Success*



Kyle Whitaker

*Strategic Leader,
Student Success*

Connect with EAB



@EAB



@EAB

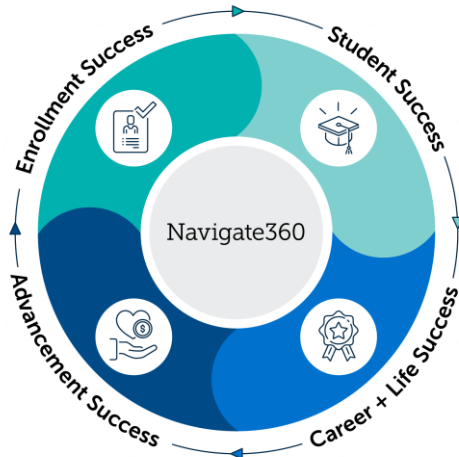


@eab_

Navigate360: Higher Ed's Leading Student CRM



Recruit, Retain, and Empower Students in College and Beyond



Transformational Results for Partners

With 10+ years of experience across 850+ schools and 10M students, we help our partners reach their goals.

3-15% Typical graduation rate improvement

2-12% Typical retention rate improvement

5:1 Typical ROI for Navigate360 partners

Staff Workflow & Automation | Student Engagement Hub | Reporting & Analytics

Amplified by AI

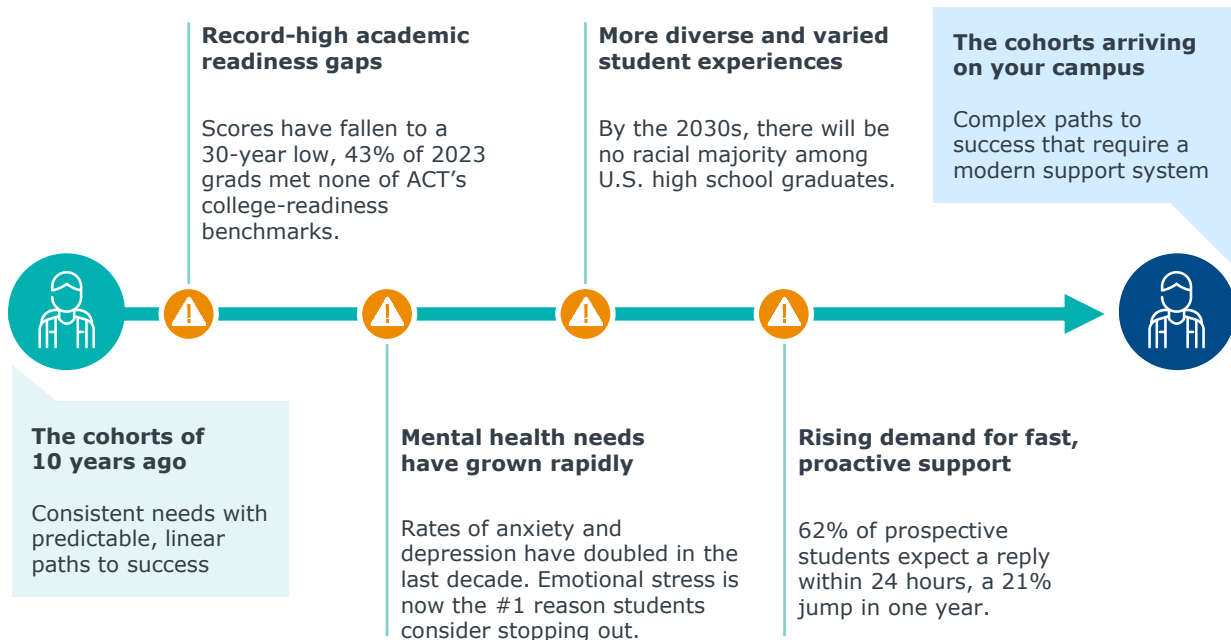
Beyond Technology: The Student Success Collaborative

Each Navigate360 partner becomes part of the Student Success Collaborative, gaining access to decades of research, an EAB expert dedicated to their success, events designed to share best practices, and a close-knit community of peers.



Why Proactive Support is Critical Today

Most Infrastructure Designed for a Student that Doesn't Exist Anymore

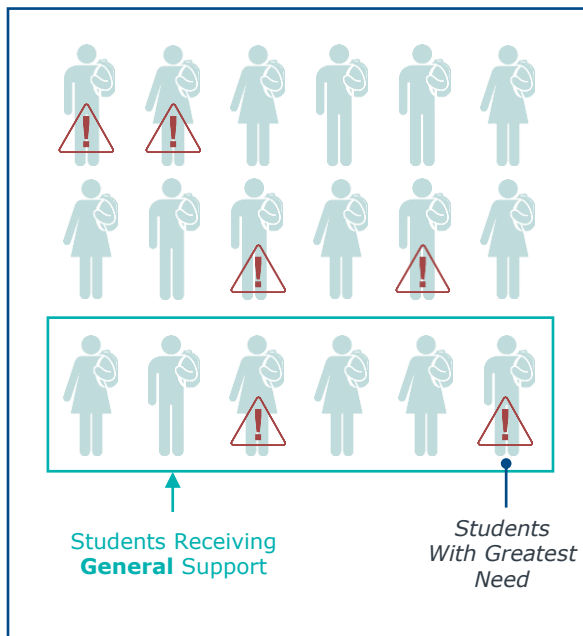


ACT (2023). *ACT Scores Decline for Sixth Year in a Row*. Inside Higher Ed. Lumina Foundation & Gallup (2023). *Stressed Out and Stopping Out: The Mental Health Crisis in Higher Education*. WICHE *By the 2030s, No Racial Majority Among U.S. High School Graduates*. ICEF Monitor (2023). *It's a Matter of Time: The Importance of Speedy Response to Student Enquiries*.

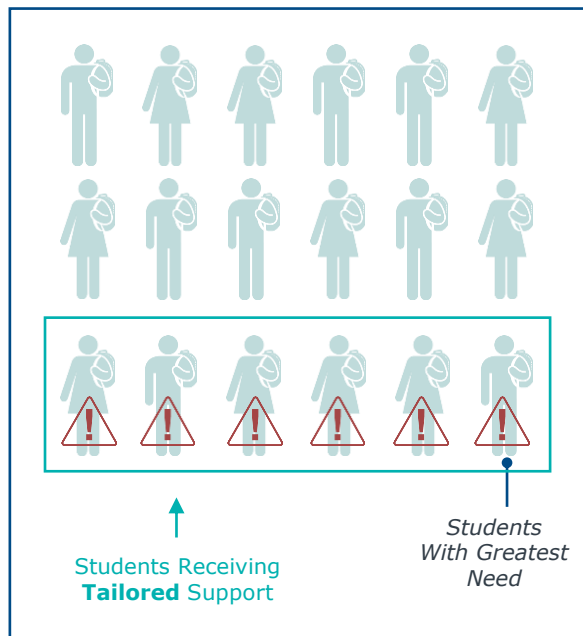
One-Size-Fits-All Approach No Longer Viable



Traditional, Passive Advising




Proactive & Strategic Advising





Proven Framework for Proactive Support

Anticipate Student Needs and Deliver Timely, Tailored Support

	Best Practice
Baseline Level Of Support	<p>Consistent scheduling and check-in processes across all student services.</p> <p>Proactive strategies focused on anticipating student needs, intervening early, and providing timely, tailored support</p> 
Monitored Concerns and Feedback	<p>Regular feedback gathering to continuously improve support services.</p> <p>Faculty reporting student concerns and achievements promptly.</p> <p>Staff contributing to a comprehensive support system.</p> <p>Students voicing concerns and receiving timely help.</p> <p>Using data insights to guide decisions and tailor support.</p>
Scaled Actions & Differentiate Care	<p>Clear pathways for addressing student concerns and alerts.</p> <p>Continuous assessment of interventions to ensure desired outcomes.</p> <p>Aligned communication efforts for consistent, coordinated student support.</p> <p>Tailored outreach meeting the needs of different student groups.</p>

Where to Start



Areas of Focus When Moving Toward a Proactive Success Strategy

Proactive Best Practices

- Using data insights to guide decisions and tailor support
- Continuous assessment of interventions to ensure desired outcomes
- Faculty reporting student concerns and achievements promptly
- Staff contributing to a comprehensive support system
- Students voicing concerns and receiving timely help
- Clear pathways for addressing student concerns and alerts
- Aligned communication efforts for consistent, coordinated student support
- Tailored outreach meeting the needs of different student groups

Use data to inform and assess support strategies



Empower faculty to raise concerns and positive alerts



Streamline communication



- 1 Three Pillars of a Proactive Support Model
- 2 How Navigate360 Simplifies Proactive Student Support
- 3 Key Takeaways and Resources

Three Pillars of a Proactive Support Model



**Use Data to Drive
Early Support**



**Empower Faculty to
Raise Concerns and
Positive Alerts**



**Streamline
Communication**



Identify the Right Student Populations

Align Support Strategies With Student Needs and Institutional Goals

Purpose of Data-Enhanced Support Strategies

- Identify a population of students who will **benefit most from inclusion** in support initiatives
- Ensure **resources** are used strategically
- Inflect **institutional goals**

If you already have a focus population in mind

Use student data to determine exactly which students make up your population of interest ✓

Use tools to confirm that your focus population is the best population to focus on ✓

Confirm that your population is aligned with institutional priorities ✓

If you do not yet have a focus population in mind

✓ Use student data to uncover populations in need

- ✓ Ask yourself questions such as:
- What are your institution's priorities and focus areas?
 - What equity gaps exist on campus?
 - What do students need right now?



Unify Data to See the Whole Student

Uncover Which Student Groups Will Benefit Most From Additional Support

Data Sources

Navigate360



Success Markers



Alerts & Cases



Appointment Data



Progress Reports

Institutional



Admissions



Residence Life



Academics



Financial Aid

Tools

Tools in Navigate360 to identify data for analysis



Historical Trend Analytics

Gain context on historical success trends.



Population Health Analytics & Advanced Search

Use AI to identify support trends based on common traits.



Reports

Understand student and staff interactions.



Predictive Analytics

Identify key populations of interest on campus today.



Resources Are Strategically Aligned to Student Need

Example Data Points for Stratification

Academic Performance

- Cumulative and Term GPA
- Changes in GPA
- Count of D/F/W Grades
- Current Major(s)

Academic Progress

- Lifetime Earned Credits
- Change in Attempted Credits
- Earned-to-Attempted- Credits Ratio

At Entry/ Preenrollment

- High School GPA
- ACT/SAT Scores
- Transfer Status
- Transfer Credits

Demographics

- Student Age at First Term
- First-Generation
- Gender
- International

Organized Into Three Levels of Support

LOW

Focus on self-guidance and automated nudges

MODERATE

Implement proactive interventions and caseload management

HIGH

Provide intensive, holistic support with frequent touchpoints

Key Benefits to This Approach



More Equitable Support



Time Savings

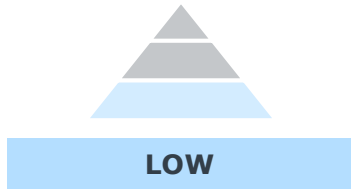



Cost Savings




Tailored Advising Based on Student Need Levels

Using Data to Tailor Advising Caseloads at Savannah State




 **2** advising meetings per term



 **4** advising meetings per term



 **6** advising meetings per term

 **3 Students**

 **12 Appointments**

Advising appointments are tailored by need level, with **caseloads distributed based on appointment demands**, not just student count.

 **25%**

Increase in first-year retention over three years, including a **7% increase after year 1**



Move from Data to Decisions—Faster

Data-informed insight is the foundation of early intervention

How AI Speeds Up Data-Driven Insights



Generates reports in minutes using plain language to identify students who need support



Spots trends across student groups by combining data from your CRM, LMS, and SIS



Translates degree requirements into actionable advising steps



Ensures decisions are guided by more than just anecdotal insight

Real Prompts from EAB's AI Assistant

- *Show me students on academic probation who have not met with an advisor this quarter*
- *I am looking for a group of students who have not logged into their LMS in a specific time frame*
- *All my report summaries from Oct through Dec 2024 for my students who have completed 60 or more units*
- *I need a report that shows me all active military and active military dependents enrolled in Spring 2025*

5K

Unique report assistant queries from 350+ schools in the first three months of use

Three Pillars of a Proactive Support Model



**Use Data to Drive
Early Support**



**Empower Faculty to
Raise Concerns and
Positive Alerts**

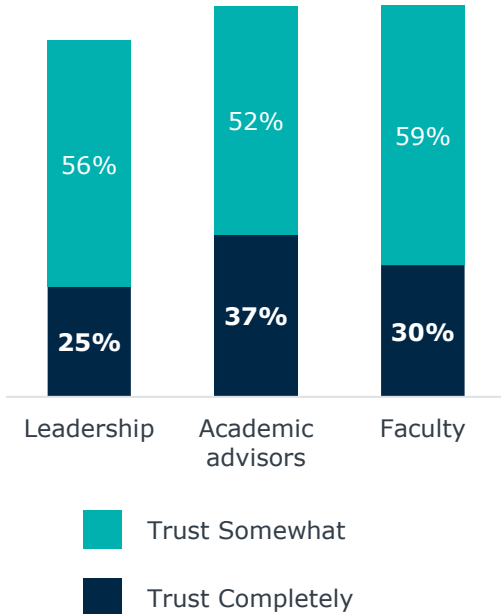


**Streamline
Communication**



The Critical Role of Faculty and Staff

Key Partners in Proactive Student Support



The Cornerstone of Student Success:

- ✓ Faculty are of the most trusted on campus, uniquely positioned to support and influence students
- ✓ Early faculty and staff interventions stop small issues from becoming major problems
- ✓ Faculty engagement strongly predicts student success and long-term achievement



Faculty Are Key to Raising Alerts

What's Holding Them Back?

Why Faculty Are Ideal for Raising Alerts:

- Faculty have the **most direct and frequent** contact with students, putting them in the best position to **notice early signs of struggle**
- Faculty engagement in early alert systems has a proven **positive impact** on student **retention and graduation rates**
- The time faculty spend with students makes them **essential allies in any proactive student success strategy**

Common Reasons Why Faculty Aren't Engaging in Alerts:



Faculty, especially adjuncts, are **often too busy** to identify at-risk students or feel **unsure about the value** of their input



Perception that the alert system is **solely for flagging grades**, not for broader behavioral or academic concerns



Unsure of which behavioral risk indicators to flag or how to effectively use the system

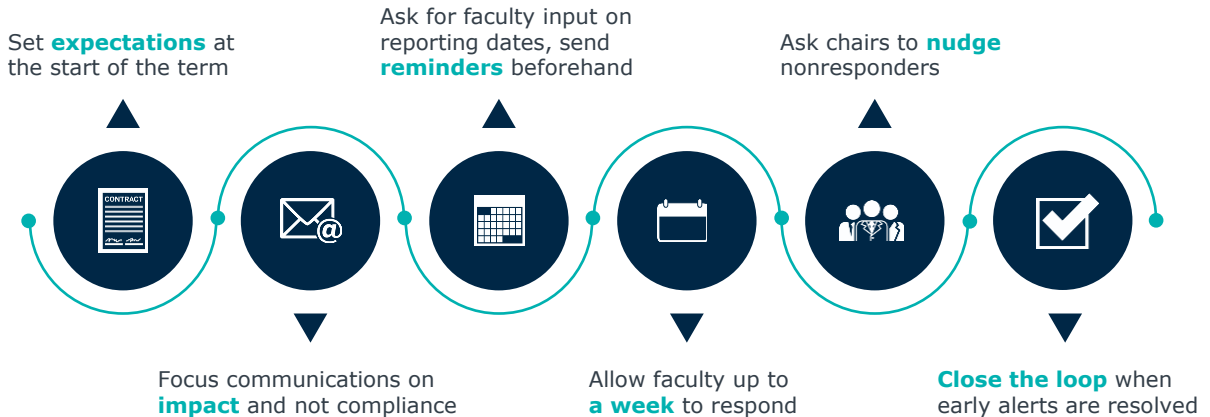


Concern that alert will **harm faculty-student relationship**



Strategies to Boost Faculty Engagement

Provide Clear Structure for Ease of Participation



Built on a foundation of **easy-to-use technology**, with **proper training** and **clear processes** to avoid additional administrative burden



Formalize Early-Alert Reasons

For Maximum Impact, Create Short List of Descriptive Early-Alert Reasons

Benefits of Formalized Alerts

- ✓ Streamline faculty decision-making process; avoid choice indecision
- ✓ Allow staff to match student with best intervention, support staff
- ✓ Improve ability to focus efforts
- ✓ Simplify impact analysis



Early-alert reasons should be **insightful, actionable, measurable**

Sample Early-Alert Reasons:



- 1 Assignment concern
- 2 Attendance concern
- 3 Student should seek tutoring
- 4 Student should withdraw from course
- 5 Student not paying attention or sleeping
- 6 Poor grades
- 7 More than academic issue



Make It Easier for Faculty to Engage

Lighten the lift for faculty to strengthen your support network

How AI Makes Faculty Engagement Easier




- ✓ Drafts personalized, ready-to-send outreach for reporting deadlines
- ✓ Escalates student concerns raised in chat to the alert system or appropriate staff
- ✓ Simplifies faculty workflows with quick, structured messages for meetings or outreach
- ✓ Provides instant answers to faculty or staff questions

AI Assistant for Staff



I have a meeting with Laura in 15 minutes; can you summarize her engagement so far?

 Laura Gonzales, a Biology major with a **2.64 GPA**, is actively engaged in academic planning, tutoring, and support services. She is focused on **graduation preparation, financial literacy, and mental wellness**, while also seeking career guidance.

Overall, Laura is proactive in addressing her academic and financial challenges and working toward greater confidence in her future plans.

+ Ask anything 

Three Pillars of a Proactive Support Model



**Use Data to Drive
Early Support**



**Engage Faculty as Key
Partners in Success**



**Streamline
Communication**



Why Streamlined Communication Matters

The Role of Effective Communication in Proactive Student Success



Benefits of Streamlined Communication

Consistent Messaging

Ensures that students receive timely and coordinated messages, reducing the chances of confusion or missed opportunities for outreach

Coordinated Efforts

Aligns all departments to reduce redundant messaging, automate communications, and maximize staff time for student support

Ensure Students Receive Consistent, Relevant Info

A communication calendar aligns multiple support units with academic year

Sample Calendar

M	T	W	H	F	S	U
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Advising

Financial Aid

Registrar

Residence Life

Student Life

Why?

- Avoids overwhelming students with messages
- Reduces burden on staff after upfront effort
- Paves the way for more customized and personalized messaging strategies in the future

How?

- Coordinated Across Departments
- Routine Communications Automated
- Audiences are Segmented



Creating an Impactful Communication Calendar

Key Strategies for Effective Planning and Execution



Set Clear Objectives

Define the **primary goals** of your communication and intervention efforts, such as **increasing retention** rates or **supporting at-risk students**

Gain Stakeholder Involvement

Engage key departments like academic advising, student services, and faculty to **ensure comprehensive coverage**



Use Strategic Timing

Schedule communications and interventions **around critical academic milestones** (e.g., start of term, midterms, finals) to maximize impact.

Track Evaluation Metrics

Set **measurable outcomes** to assess the calendar's effectiveness, such as response rates and student engagement metrics



Example from North Hennepin Community College

Core Features of an Effective Communication Calendar

Highlights

1. Process calls out **which tools and modes of communication** will be used
2. Clearly names the **responsible party**
3. Outcome provides the **"why"**



Annual Advising Communication Calendar

Fall Semester Outline

Timeline (annually)	Advising Initiative	Process	Responsible Party	Outcome
September Week 1	Advisor Introduction*	Automated Action through Navigate – message/email	Advisors	Student is introduced to advisor with contact information
September Week 3	"Required" Long-term course planning with degree-seeking Students who have less than 20 credits, not PSEO*	Appointment Campaign through Navigate, ran through Mid-October	Advisors	Student and advisor creates educational plan
October Week 2	Warning Student Outreach*	Appt or Messaging Campaign to all enrolled warning students	Advisors	Student meets with advisor and understands what they need to get back in good standing
October Week 3	Priority Registration Week Reminder	Communication via weekly newsletter, post on D2L & Navigate, social media postings & push notifications	Guided Pathway Coordinators	Students are aware of Priority Registration and options to meet with an advisor
November Week 4	Registration/Advising Reminder	Communication via postcards, Text, email campaign to all current students not registered	Guided Pathway Coordinators	More students will register
November Week 4	Recruit Back Efforts for Spring*	Enrollment Campaign to students who are enrolled for Fall but not registered for spring and did not graduate, ran through Mid-December	Advisors	More students will register
December Week 2	Course Planning - One semester Appointment Campaign *	Appt Campaign to students who are enrolled for Fall but not registered for spring and did not graduate, ran through end	Advisors	More students will meet with advisor and register



Streamline Student Communications

Help staff craft timely, student-centered messages in a fraction of the time

How AI Improves Campus Communication



- ✔ Drafts and refines student messages based on timing, purpose, and audience
- ✔ Provides 24/7 chatbot support to handle routine student questions
- ✔ Helps staff create clear, action-oriented messages that reflect asset-based language
- ✔ Boosts message readability and increases response rates with goal-specific suggestions



"The AI assistant allows our advisors to customize their message more easily, without having to go outside Navigate360. EAB knows education—**it's like having an EAB consultant in your back pocket.** It speaks the language."

- Vice President for Student Affairs
Arapahoe Community College



Southern Nazarene University (SNU) cut message creation from an hour to **just 15 minutes** using EAB's AI Assistant



75% reduction in outreach message drafting time

How Can We Help?



*I'd like to speak to an
EAB expert about...*



- 1 Learning more about **one of the three strategies** discussed today
- 2 Using a student success platform to **streamline proactive support efforts**
- 3 How AI can **save staff time and improve student support**
- 4 Scheduling a demo of **Navigate360**

- 1 Three Pillars of a Proactive Support Model
- 2 **How Navigate360 Simplifies Proactive Student Support**
- 3 Key Takeaways and Resources

Three Pillars of a Proactive Support Model

With Navigate360



Data Use to Drive Early Support

- ✓ Centralized Student Data
- ✓ Predictive Analytics
- ✓ Population Health Analytics
- ✓ Reporting and Analytics



Engage Faculty as Key Partners in Success

- ✓ Early Alerts and Positive Messaging
- ✓ Case Management
- ✓ Shared Workspace
- ✓ Change Management



Streamline Campus Communications

- ✓ Automated Campaigns
- ✓ Customizable Templates
- ✓ Student Engagement Hub

Amplified by student-centric AI

AI That Works With You—and For You

Built on 20+ years of higher ed research

AI Assistant

A daily helper for basic tasks so your team can focus on bigger priorities



**Assistant
for Staff**

Create content

Find reports

Launch campaigns

Filter data

Summarize profiles

Create course plans



**Assistant
for Students**

24/7 chat support

Create course plans

Manage to-do lists

Schedule appts.

Connect with staff

Get fin. aid guidance

AI Smart Network

Works autonomously behind the scenes to support your institutional goals



**Academic
Performance**

Tracks grades and LMS activity

Prompts alerts, tasks, and campaigns



**Financial
Support**

Monitors aid gaps

Sends referrals, reminders, and scheduling



**Yield
Management**

Spots melt signals

Drives reminders, outreach, and appointments



**Career
Preparation**

Identifies low engagement

Assigns journeys or job simulations

Use these agents, customize them, or build your own

Extends your team's capacity by **25%+**

A powerful network that drives
2-12% higher retention

- 1 Three Pillars of a Proactive Support Model
- 2 How Navigate360 Simplifies Proactive Student Support
- 3 **Key Takeaways and Resources**

Key Takeaways For Proactive Student Support

1 Use student data to **identify risks and tailor support**; refine based on outcomes

2 Equip faculty with **easy tools and clear guidelines** for early alerts

3 Coordinate communication to ensure **timely, relevant outreach** without redundancy

4 AI isn't a strategy on its own—but it can **scale and sustain** proactive support

How Can We Help?



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Related Resources For You

1 Request a copy of EAB's Annual Calendar Template

2 Explore 30 AI use cases that are saving support staff 10+ hours each week

3 Learn what students are asking university chatbots in our blog

4 Read our latest insight paper, "The Next Technological Revolution in Student Success"


30 AI Use Cases for the Student Journey


How Navigate360's AI Saves Support Staff 10+ Hours a Week


Time is one of the most finite resources in higher education. With many advisors already stretched thin managing full caseloads, every extra hour counts. Navigate360 already helps institutions coordinate advising, communications, early alerts, and student tracking in one platform. Now, with the addition of Student-centric AI, intentionally designed to improve daily life for staff and outcomes for students, the platform goes even further. AI agents monitor student needs in real time, triggering smart, automated actions and freeing staff to focus on the meaningful interactions that drive student success.


10+


hours per week saved per staff member with Navigate360's AI



Onboarding Support & Lead Generation


Academic Performance


Financial Support


Career Guidance


Retention & Graduation Guidance



General Student Support

Navigate360's AI Smart Network monitors for...

Disruptive advising activity, missed appointments, and program change gaps	Anxiety, LMS activity, missed emails, grades, and attendance gaps	All plan balances, and missed financial deadlines	Disengaged students and missed career milestones	Students engage and students who need support to complete final semesters	Elevated support needs or faculty-reported concerns
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...which triggers action such as...

Send automated reminders and nudges	Alert students about missed appointments, LMS activity, and program change	Alert students about missed financial deadlines	Monitor students to sign up for workforce or job leads	Identify students who need support to complete final semesters	Recommend advisor contacts for targeted students
Send personalized onboarding messages to new students	Automated course checks and program change nudges	Alert students about missed financial deadlines	Identify students not engaging with career and workforce nudges	Alert students who need support to complete final semesters	Send automated support messages, e.g. "How did that go?"
Send course change alerts and nudges	Monitor the LMS and program change activity	Alert students about missed financial deadlines	Nudge students to complete career and workforce leads	Alert staff when a student needs support to complete final semesters	Alert staff when a student needs support to complete final semesters
Alert staff when a student needs support to complete final semesters	Identify students who need support to complete final semesters	Identify students who need support to complete final semesters	Flag students missing prerequisites for next state course path	Alert staff when a student needs support to complete final semesters	Alert staff when a student needs support to complete final semesters
Alert staff when a student needs support to complete final semesters	Alert staff when a student needs support to complete final semesters	Alert staff when a student needs support to complete final semesters	Connect students with mentors or advisors who meet their needs	Alert staff when a student needs support to complete final semesters	Alert staff when a student needs support to complete final semesters



See how Navigate360's AI transforms student success or book a demo to see it in action.

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Today's Presenters



Joanie Garcia

*Strategic Leader,
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Kyle Whitaker

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We value your feedback. Please take a few minutes to
complete the short survey that pops up in your chat.



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