



Toolkit: Designing and Implementing a Targeted Advising Campaign

SSC Targeted Advising Campaigns

Targeted advising campaigns enable advisors to operationalize a proactive approach to advising students by directing 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.

The SSC platform makes it easier to run these initiatives by helping users quickly build lists of students that fit certain criteria of interest. By deploying SSC risk analytics in combination with work list filters and student tracking features, advisors can create highly-specific campaigns and ensure that no students fall through the cracks.

This toolkit provides step-by-step instructions and worksheets for designing your own targeted advising campaign using the SSC platform. Please reach out to your Dedicated Consultant with any questions.

Good luck!

Advisors use SSC campaigns to...



Make a greater impact on student success through improved processes for identifying and reaching students, especially those at high risk



Focus limited advisor time on manageable groups of students



Efficiently channel targeted outreach, resources, and attention toward groups of students with similar needs



Explore and popularize innovative ideas for data-driven advising practices

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Guide: Targeted Advising Campaign Design Process

Step 1: Define a Target Student Population

1. Brainstorm a group of students that you want to target for intervention (Use the worksheet on p.4 to write out each step in your design)
2. Select the parameters that will define this population and create a work list in the SSC platform (For step-by-step instructions on creating a work list see p. 9)
3. Articulate objectives for the short-term (e.g., rounds of outreach, advising sessions) and long-term (e.g., retention, risk reduction) impacts of your campaign

Step 2: Plan Your Outreach Strategy

4. Determine how frequently and in what way you will contact targeted students (track the success of different types of outreach to inform future campaigns and other advisors)
5. Articulate the messages you want to communicate and resources you want to provide at each interaction (e.g., outreach, advising sessions); consider the action steps this specific student population needs to take and craft appropriate messages
6. Identify next steps you will take to follow up with these students and ensure the impact of your initiative
7. (Optional) Export your work list from the SSC platform and use student contact information to send outreach or perform a mail merge

Step 3: Evaluate and Communicate Your Campaign Success

8. Identify metrics for measuring the outcomes of your campaign and targets that will define success
9. Determine how you will communicate your targeted advising campaign's outcomes, including communication format and audiences (e.g., other advisors, deans, SSC consultant)

Questions to Ask in Selecting a Population

- Which students struggle but might not seek assistance?
- What group of students am I passionate about?
- Which students need to complete specific actions in the near future to improve their chances of success or avoid barriers to their progress?

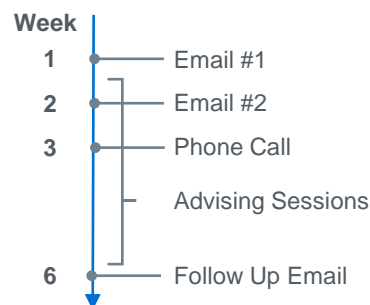
Parameters Available in the SSC Platform: cGPA, advisor/group, reminder set, student 's, last name, student status, college/school, major, concentration, degree, credits earned, student classification, term enrollment, risk, success markers, # of notifications



Check that your parameters generate a manageable number of students. We recommend **30 to 75** students.

Suggested Outreach Frequency: In successful previous campaigns, advisors outreached to students **3 to 5** times over a one or two month period of the semester

Example Timeline



Potential Success Metrics

For Short-Term Outcomes



- Percent of intended students contacted for each outreach interaction
- Percent of original target population that completes an individual advising session
- Number of student status changes

For Long-Term Outcomes



- Changes in student notifications count
- Number of successful major changes
- Number of students whose risk prediction decreases by the next term
- Retention of the target population

Campaign Design Worksheet

SAMPLE

Define a Target Student Population

My target student population and rationale for why they require this additional attention:

Mid-career Management majors with borderline GPAs but high risk predictions. They need help to succeed and have time to make significant changes but might fly under the radar.

Parameters I will use to create an SSC work list:

- College/School: *Business*
- Major: *Management*
- Credits Earned: *30 - 60*
- Cumulative GPA: *2.00 - 2.70*
- Risk: *High Risk*
- Term Enrollment: *Currently Enrolled*

Objectives: This targeted advising campaign will...

1. *Contact all identified students at least three times to encourage them to initiate an advising session*
2. *Schedule an individual advising session with at least 75 percent of identified students*
3. *Connect 50 percent of students with the tutoring center to work on their academic standing*
4. *Reduce these students' risk of stopping out*

Total number of students identified: 45

Plan Your Outreach Strategy

Action Steps These Students Need to Take:

- *Seek out academic support services, such as tutoring and study habit workshops*
- *Select and register for courses that match their strengths and in which they have a higher likelihood of success*

My Communication Plan:

Method	Timing/Frequency	Communication Objective and Resources
<input checked="" type="checkbox"/> Email	<i>Two times, one week apart during the first half of the semester</i>	<i>First: notification of risk status, encourage to make appointment; second: more urgent encouragement, suggest tutoring center before midterms</i>
<input checked="" type="checkbox"/> Phone	<i>Once in the week after email #2</i>	<i>Discuss resources, why students are at-risk, try to schedule an in-person appointment</i>
<input checked="" type="checkbox"/> Advising Session	<i>Once as early in the semester as possible</i>	<i>Walk students through notifications, discuss why they are at-risk, maybe even discuss major choice, discuss study habits and time management, plan coursework for next semester</i>

My Follow Up Steps:

- *Check with tutoring center to see which students have made appointments*
- *Analyze student risk information one and two semesters after campaign*

Evaluate Your Campaign Success

Metrics and Target Outcomes:

Metric	Target	Actual Outcome
<i>Percent of population contacted</i>	100%	
<i>Number of students that complete in-person advising sessions</i>	34	
<i>Number of students that make appointments with the tutoring center</i>	23	
<i>Number of students that improve their risk level by the end of the following semester</i>	25	

Campaign Design Worksheet

Define a Target Student Population

My target student population and rationale for why they require this intervention:

Objectives: This targeted advising campaign will...

- 1.
- 2.
- 3.

Parameters I will use to create an SSC work list:

-
-
-
-
-
-
-

Total number of students identified: _____

Plan Your Outreach Strategy

Action Steps These Students Need to Take:

My Communication Plan:

Method	Timing/Frequency	Communication Objectives and Resources
<input type="checkbox"/> Email		
<input type="checkbox"/> Phone		
<input type="checkbox"/> _____		
<input type="checkbox"/> Advising Session		

My Follow Up Steps:

Evaluate Your Campaign Success


Metrics and Target Outcomes:

Metric	Target	Actual Outcome

Innovative Ideas for Targeted Advising Campaigns

Student Populations Targeted in Previous SSC Campaigns

Campaign	Example Filters	Action
<input checked="" type="checkbox"/> At-risk students that may need to switch majors	Risk: High risk Credits Earned: 30-45	Encourage students to evaluate their academic performance and consider a major change
<input checked="" type="checkbox"/> Undeclared students above a certain credit threshold	Major: Undeclared, Pre-major Credits Earned: At least 30, 45, or 60 credits (depending on the institution)	Help students select the appropriate major and declare as soon as possible
<input checked="" type="checkbox"/> High-performing students not currently enrolled in coursework	Cumulative GPA: Over 3.00 Term Enrollment: Currently not enrolled	Figure out why students are not enrolled and get them back into classes
<input checked="" type="checkbox"/> Seniors with excessive credits	Student Classification: Senior Credits Earned: At least 120	Help students determine what requirements they still need to fulfill to graduate and how to fulfill them quickly
<input checked="" type="checkbox"/> Pre-majors that are at risk of not meeting selective admissions requirements	Exact filters will vary by major Possible Pre-Majors: Pre-Nursing, Pre-Engineering, Pre-Business	Encourage students to prepare a "Plan B" and seek academic support to improve performance
<input checked="" type="checkbox"/> Students close to graduating that may need additional assistance	Credits Earned: At least 90 Risk: Medium risk or high risk	Connect students with the resources they need to finish out their degrees
<input checked="" type="checkbox"/> Students who may not have been advised recently (for institutions that use student statuses frequently)	Student Status: "No action taken"	Check in on students that the platform suggests may not have been advised recently
<input checked="" type="checkbox"/> "Stop outs" that could return and graduate easily	Term Enrollment: Currently not enrolled Risk: Low risk Credits Earned: At least 90	Motivate students to re-enroll and complete their degrees
<input checked="" type="checkbox"/> Potential recruits for the honors program	Term Enrollment: Currently enrolled Risk: Low risk # of Notifications: Less than 2 Cumulative GPA: Over 3.70	Discuss strong academic performance and potential enrollment in the honors program
<input checked="" type="checkbox"/> High-performing students for recruitment to a particular major	Term Enrollment: Currently enrolled Risk: Low risk Major: Undeclared	Ensure high-performing students know they are capable of taking on challenging majors



If you have other ideas for targeted advising campaigns, send them to your SSC consultant!

Three Strategies to Extend Your Impact



Collaborate to Sustain Momentum

Run targeted advising campaigns concurrently with other advisors. Peer communication and accountability can help keep campaigns moving forward and elevate campaign quality – plus it gives you an excuse to collaborate!



Build Collective Knowledge

Don't keep your campaign insights to yourself. Debrief with colleagues after the completion of your targeted advising campaign to evaluate success, discuss lessons learned and best practices, and generate ideas for future campaigns.



Share Your Success

Improve campus understanding and practices by communicating campaign results to the wider campus community. Consider a formal report or presentation to share your insights with advising staff, executives, deans, and faculty members.

Discovery Advising Campaigns to Generate Best Practices

Central Michigan University, Public Research University in Mount Pleasant, MI



CMU by the Numbers

27,626

Total enrollment

76%

First-year retention rate

54%

Six-year graduation rate

Case in Brief

Both **SSC initiative leaders** and **advisors** on CMU's campus recognized two challenges : integrating technologies into advising workflow, and reaching the students most in need of help.

As a result, they conducted a targeted advising campaigns discovery initiative. By experimenting with campaign design and analyzing the results, CMU hoped to:

- Explore efficient, proactive ways of intervening with at-risk students
- Develop a concrete use-case and step-by-step methodology for the SSC platform to drive utilization
- Identify and communicate best practices for targeted outreach, to engage at-risk students in advising and success coaching services

Presentations highlighted critical insights gained through the campaigns initiative, especially around targeted outreach and recommendations for the implementation of future campaigns.

Empowering a Group of Engaged Advisors to Design and Test Campaigns

1



Started with a Small Group of Engaged and Innovative Advisors

CMU recruited seven success coaches from the Office of Student Success to run a “test” initiative of targeted advising campaigns

2



Provided a Template, but Let Advisors Select Their Populations and Outreach Strategies

Advisors focused on niche groups of students they were passionate about and designed their own unique outreach approaches and materials based on a common template

3



Ran Campaigns Simultaneously

Prevented advisors from “borrowing” each other's ideas, but met frequently with leadership to discuss progress and maintain momentum

4



Debriefed to Discuss Results and Synthesize Insights

Advisors each presented a portfolio of their results at an end-of-semester pull-up, leading to group discussion, analysis, and development of recommendations for future campaigns and use of the SSC platform

Central Michigan's Campaigns

Teacher Education Pre-Majors at Risk of Failing Admissions Requirements	Potential Exercise Science Majors in Need of Major Re-evaluation
Academic Support for Struggling Accounting Majors	Communication Majors at Risk of Failing Program GPA Requirement
Long-term Planning for Psychology (Graduate Preparation) Majors	Business Administration Pre-Majors at Risk of Failing Admissions Requirements
Major Declaration for Undeclared Sophomores	Understanding the Needs of Recreation, Parks, and Leisure Services Majors
Academic Support for Struggling History Majors	

Portfolio presentations included:

- Campaign purpose
- Articulated objectives
- Target population
- Actions and interventions (planned and completed)
- Progress and results
- Lessons learned
- Recommendations for future campaigns

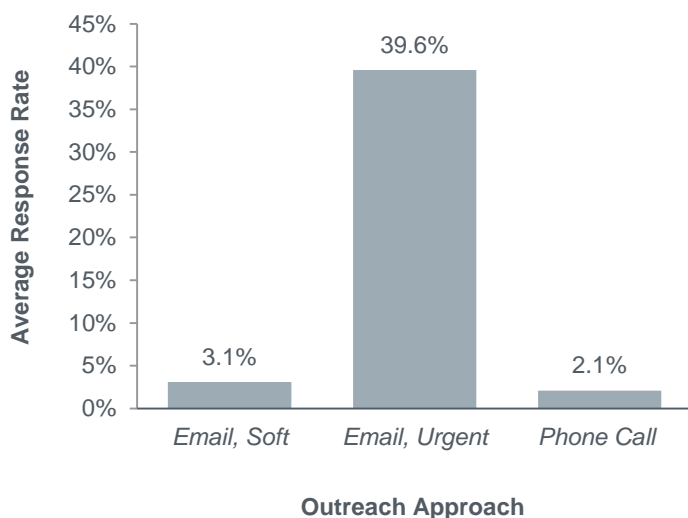
Building Collective Knowledge on Targeted Outreach

Central Michigan University, Public Research University in Mount Pleasant, MI

Insight #1: Outreach Medium and Urgency Impact Student Responsiveness

Shift in Tone Improves Student Response Rate

Results from Three Most Successful Campaigns



Three campaigns generated the highest number of in-person and phone advising meetings, enabling success coaches to meet with between 33 and 50 percent of their target populations.

In general, advisors struggled get students to respond to targeted outreach, the first step toward scheduling and completing an advising session. Advisors from the three successful campaigns all sent two “soft-approach” emails, one phone call/message, and one email with more urgent tone and content. Analysis of these advisor’s portfolios revealed three insights:

- Phone numbers were difficult to accurately collect and phone messages elicited very few student responses
- Only 3.1 percent of students responded to a soft approach email
- Third emails, with stronger tone and more direct content, generated much higher response rates

Insight #2: Successful Emails are Individualized, Urgent, and Actionable

Ineffective Emails

- ✘ Use vague subject lines (e.g. “Good Afternoon” or “Office of Student Success”)
- ✘ Suggest resources, but no immediate action steps
- ✘ Reduce urgency by saying “If you would like to schedule a meeting...” or “I would be happy to help you with...”
- ✘ Bury critical information in lengthy exposition

Effective Emails

- ✔ Pique interest in the subject line (e.g. “Academic Concerns”)
- ✔ Mention the student’s major and missed requirements or thresholds
- ✔ Express explicit concern about progress, program admittance, or graduation
- ✔ Directly ask students to make appointments and provide deadlines

Sample Language

from Emails with High Response Rates

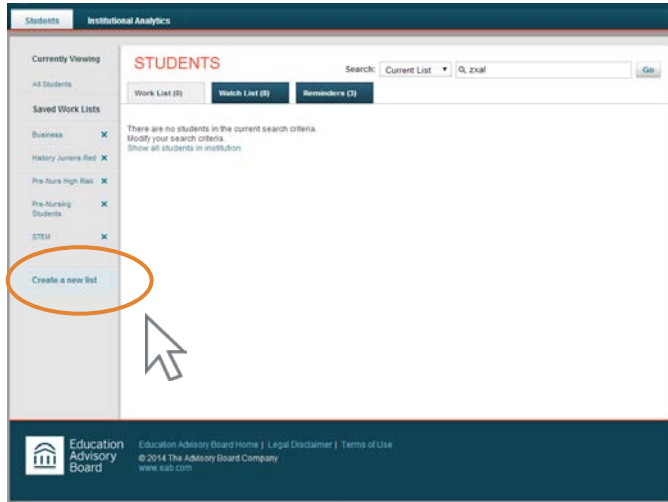
*“In order to continue in the College of Business and succeed at obtaining an Accounting major, the minimum requirement is a 2.5 GPA. I would like to meet to further discuss your goals and create action steps together to make this obtainable. Please call me by **March 28th** to schedule an appointment so I may assist you with necessary resources.”*

*“I am increasingly concerned about your progression toward admittance to the program and graduation...I ask that you email me back by **this Friday (March 21)** with dates/times that we can set an appointment within the next two weeks.”*

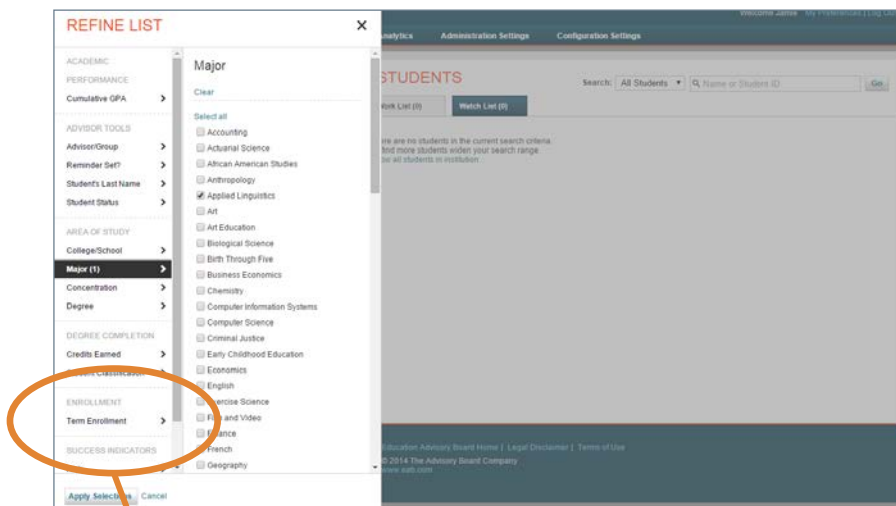
Guide: Campaign Implementation in the SSC Platform

How to Define a Target Population with the Work List Function in the SSC Platform

1 Create a new list



2 Select any basic characteristics that define your student population of interest (e.g., college/school, major, concentration, degree, credits earned, term enrollment, cGPA, student classification)



Select "Currently Enrolled" to exclude students not enrolled in classes during the term in progress at the time of work list creation

? **How do these filters function?**
Our new SSC Filter Glossary contains a complete list of all current filters in the SSC platform, and explanations of how they work to refine a list of students. For a copy, please contact your dedicated consultant.

Campaign Implementation in the SSC Platform (Contd)

3 Refine your search with student status, risk, success markers, and # of notifications to identify actionable students

The student statuses available to you will depend on your institution, but you can select students based on their current status and when that status was set by a user. Advisors most often use this filter to find students that have the “no action taken” status and may not have been contacted before.

The first screenshot shows the 'REFINE LIST' interface with the 'Student Status' filter expanded. The 'No action taken' option is selected. The second screenshot shows the 'REFINE LIST' interface with the 'Risk' filter expanded. The 'Moderate Risk' and 'High Risk' options are selected. Both screenshots also show the 'Success Markers' and '# of Notifications' filters.

Target students by their likelihood of graduation by selecting a risk level

Select success markers or specify a # of notifications to find students that have missed major milestones or thresholds

The screenshot shows the 'REFINE LIST' interface with the 'Advisor/Group' filter expanded. The 'Advisor/Group' filter is highlighted with a blue box.

If your institution has activated this filter, you can select students according to any predetermined assignments in your SIS (e.g., advisor group, student athletes, Honors)

Campaign Implementation in the SSC Platform (Contd)

4 Review, save, and export your work list

Review the number of students in your work list to determine if it is actionable or overwhelming

Click here to export your work list in CSV format to use in Excel. Exportation enables you to conduct mass outreach, perform a mail merge, or combine SSC data with other sources of student information.

Name and save your new outreach work list

5 Monitor campaign outreach and advising by changing SSC student statuses as you interact with students and setting reminders

Change individual student statuses as you send emails, call them, and meet with them.

Remind yourself when you need to follow up and add notes for students that you meet with or who never respond to outreach.

Navigate to a student's History tab to review all status changes and notes at the end of the campaign