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!

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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

<table>
<thead>
<tr>
<th>Week</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Email #1</td>
</tr>
<tr>
<td>2</td>
<td>Email #2</td>
</tr>
<tr>
<td>3</td>
<td>Phone Call</td>
</tr>
<tr>
<td>6</td>
<td>Advising Sessions</td>
</tr>
<tr>
<td>6</td>
<td>Follow Up Email</td>
</tr>
</tbody>
</table>

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

## 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.**

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**

## 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

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:

<table>
<thead>
<tr>
<th>Method</th>
<th>Timing/Frequency</th>
<th>Communication Objective and Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Two times, one week apart during the first half of the semester</td>
<td>First: notification of risk status, encourage to make appointment; second: more urgent encouragement, suggest tutoring center before midterms</td>
</tr>
<tr>
<td>Phone</td>
<td>Once in the week after email #2</td>
<td>Discuss resources, why students are at-risk, try to schedule an in-person appointment</td>
</tr>
<tr>
<td>Advising Session</td>
<td>Once as early in the semester as possible</td>
<td>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</td>
</tr>
</tbody>
</table>

### 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:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Target</th>
<th>Actual Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of population contacted</td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Number of students that complete in-person advising sessions</td>
<td>34</td>
<td></td>
</tr>
<tr>
<td>Number of students that make appointments with the tutoring center</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Number of students that improve their risk level by the end of the following semester</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>
Campaign Design Worksheet

Define a Target Student Population

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

Parameters I will use to create an SSC work list:

Objectives: This targeted advising campaign will...

1. 

2. 

3. 

Total number of students identified: _____

Plan Your Outreach Strategy

Action Steps These Students Need to Take:

My Communication Plan:

<table>
<thead>
<tr>
<th>Method</th>
<th>Timing/Frequency</th>
<th>Communication Objectives and Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ ______________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Advising Session</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

My Follow Up Steps:

Evaluate Your Campaign Success

Metrics and Target Outcomes:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Target</th>
<th>Actual Outcome</th>
</tr>
</thead>
</table>
## Innovative Ideas for Targeted Advising Campaigns

**Student Populations Targeted in Previous SSC Campaigns**

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

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

**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.

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**Central Michigan’s Campaigns**

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

**Portfolio presentations included:**

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

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**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
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.
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.

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

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.