CUNY – Queens College
Implementation Strategy
We help schools support students from enrollment to graduation and beyond.

ROOTED IN RESEARCH
- 7,500+ Peer-tested best practices
- 500+ Enrollment innovations tested annually

ADVANTAGE OF SCALE
- 1,500+ Institutions served
- 3.7 M+ Students supported by our SSMS

WE DELIVER RESULTS
- 95% Of our partners continue with us year after year, reflecting the goals we achieve together

› Find and enroll your right-fit students
› Support and graduate more students
› Prepare your institution for the future

K-12 | Community Colleges | Four-Year Colleges and Universities | Graduate and Adult Learning
What is EAB’s Student Success Management System?

The SSMS is an enterprise-level technology that links administrators, advisors, deans, faculty, other staff and students in a coordinated care network designed to help schools proactively manage student success and deliver a Return on Education.

**Our Platform Promise**

Unlock the power of data analytics, bringing real-time insights and student success management intelligence to administrators and leaders.

Create a connected and coordinated network of support for every student, enabling targeted intervention and proactive, strategic care.

Provide smart guidance at the most pivotal moments along the college journey, simplifying and structuring pathways to completion.
Project Planning and Implementation Overview

Launch Milestones

Today

- Develop leadership & engagement teams
- Webinar: Platform Demonstrations

Navigate

- Introduction to content development process
- Content Administration Tool training

Navigate Student:

- Content Development workshop
- Create marketing plan

Navigate

- Identify Phase I users and functionality
- Review advising technologies and workflows
- Finalize Student Populations

Navigate Student:

- Validate app content and configure content in CAT
- Develop Marketing Materials

Navigate

- Platform Demonstrations for campus stakeholders
- Training for Workflow & Training team
- Campaign planning

Navigate Student:

- App download & Review
- Finalizing promotion plan for app launch
- Student user group

Navigate

- Configure Training Site
- Design and configure Advising Care Unit
- Train App Admin
- Intro to Analytics

Navigate Student:

- Validate institution-specific configurations
- Develop Training Plan

Navigate

- Platform Demonstrations for campus stakeholders
- Training for Workflow & Training team
- Campaign planning

Navigate and Navigate Student Phase I Launch

Ongoing maintenance and support

- Drive student promotion efforts
- Plan for Phase II

Mid-point Implementation Experience Survey

Pre-Go-live Implementation Experience Survey
Recommended Roll-Out Strategy

Understanding the Typical Implementation Process

**Navigate Staff**

- **Phase I: Advising**
- **Phase II: Faculty & Tutoring**
- **Phase III: Financial Aid, Career Services Other Care Units**

**Navigate Student**

- **Phase I: Pilot Students (Orientation)**
- **Phase II: All Students**
- **Future Phases: Special Populations**

**Intelligence**

- **Phase I: Population Health Dashboards, Activity Analytics**
- **Phase II: Institution Reports & Predictive Model**
- **Phase III: Success Markers**

*Phases may not be concurrent*

**Phase I Focus:** Ensure advising workflow is optimized and pilot student content is configured

- Pilot group and expanded advising unit utilize the desktop site
- Pilot students download app at orientation

**Phase II Focus:** Expand to additional users and begin utilizing analytics available through historic data collection.

- Advisors, tutors and students can schedule appointments with one another
- High utilization of key features by user groups
- Roll out and strategic use of Institution Reports and Predictive Model
Staff Phase 1 & 2 Approach

**Phase I (Fall 2019)**

- P1 Units Moving Forward
  - Advising

- P1 Feature Recommendations
  - Appointment Campaigns
  - Student Profile
  - Advising Summary Reports & Notes
  - Messaging Students (Text & Email)
  - Advanced Search and Lists

  *Progress Report Campaign Pilot*

**Phase II (Spring 2019)**

- P2 Units Moving Forward
  - Additional Care Units (i.e. Tutoring, Career Services)

- P2 Feature Recommendations
  - Appointment Campaigns
  - Student Profile
  - Advising Summary Reports & Notes
  - Messaging Students (Text & Email)
  - Advanced Search and Lists
  - Student Initiated Appointment Scheduling
  - Alerts & Case Management
  - Progress Reports Campus-Wide
Comprehensive View of Student Risk and Progress

Key Takeaways

- “Smart View” of academic factors to assess student’s progress
- Shared notes and reporting to centralize documentation on students
- Progress indicators and key academic metrics identify if student may be at risk
- Student-generated data from the mobile application will be visible in student profiles*

“Previously, we were advising based primarily on gut instinct. Now, we have all the data to give them an objective sense of where they are and what they can do to improve. The conversation has changed dramatically.”

Navigate Advisor

*Interactions with Intake Survey, Quick Polls, Major Explorer, Journey progress, and Favorited Resources will be shown
Advanced Search

Generate Lists of Students for Strategic Use or Day to Day Work

Key Takeaways

• Layer multiple search filters for easy list generation and student identification

• Flexible filters provide each advisor with the ability to build lists to segment for at-risk students or prioritize students they work with on a daily basis

• Individual users can save dynamic and static lists of students to access later on

• Take immediate action from your Advanced Search by selecting applicable students. Message, initiate an Appointment Campaign, or take Notes on a group of students.
Advising Summary Reports & Notes

Track Details of Student Interactions to Facilitate Coordinated Care Network

Key Takeaways

- Advisors and Faculty may take notes on students after specific interactions, or to track need-to-know information about students.
- Notes and Appointment Reports are saved on the Student Profile, and other staff may view them (based off of institution specific permissions).
- Notes facilitate knowledge-sharing across advisors and other Care Units.
- Administrators can view Note details in aggregate via Reporting built in to Navigate.
Appointment Campaigns

Target and Track At-Risk Students for Advising Appointments

Key Takeaways

- Create outreach campaigns targeting specific student cohorts to schedule advising appointments with dedicated link
- Individual advisors can monitor and track the progress of their campaigns, view which students responded, and send follow-up reminders for those who haven’t
- Flexible filters provide each advisor with the ability to build lists to segment for at-risk students or prioritize students they work with on a daily basis
Email and Text Messaging with Students

Tools for Centrally Tracked and Flexible Communication with Students

Key Takeaways

- Advisors and support staff can have two-way conversations with students via email or text
- The platform captures all conversations automatically for a complete digital record of all communications through the platform
- Students can receive push notifications to remind them of deadlines and priorities from their “Path” timeline
Staff Phase 1 & 2 Approach

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  - *Progress Report Campaign Pilot*

**Phase II (Spring 2019)**

- **P2 Units Moving Forward**
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- **P2 Feature Recommendations**
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  - Advising Summary Reports & Notes
  - Messaging Students (Text & Email)
  - Advanced Search and Lists
  - Student Initiated Appointment Scheduling
  - Alerts & Case Management
  - Progress Reports Campus-Wide
Key Takeaways

- Solicit feedback from faculty to understand individual student performance in each course
- Collect information on a student’s likelihood of failing a class, their current or anticipated grade, absences, and the need for intervention
- Based on feedback, student support staff can intervene with students early and understand the reasons for risk, manage a Case for thorough follow-up from another office, and guide students to relevant resources

Progress Reports

Professor Home

Teodor, please respond to the following progress report request(s):

- GradesFirst Support would like you to complete 2 progress report(s) by Friday, Jun. 02, 2017
- Audrey Wilson would like you to complete 1 progress report(s) by Monday, Jun. 19, 2017
Campus-Wide Alerts, Referrals, and Documentation for Case Management

Key Takeaways

- Faculty, tutors, and other support specialists can submit one-click alerts on struggling students to notify advisors that they might be at risk.
- Advisors can also solicit information directly from faculty through Progress Report campaigns sent directly to faculty email.
- Case system allows users to generate cross-campus referrals for at-risk students right from the platform and assign them to appropriate support staff.
- Advisors can see a complete digital history for each student—including advising reports, notes, and cases—thereby closing the loop for maximum effectiveness.
Student Initiated Appointment Scheduling

Online Appointment Scheduling and Availability Management

Key Takeaways

• Appointment management allows advisors and students to schedule sessions based on both parties’ availability, with the option to send reminders for upcoming appointments.

• Real-time scheduling by various user types enables easy access to advisor and tutor services.

• Students can access appointment scheduling from their desktops and smartphones.
### Appointment Scheduling: Recommended Approach

<table>
<thead>
<tr>
<th>Phase I: Staff Initiated Appointment Scheduling</th>
<th>Phase II: Student Facing Scheduling</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Advising Appointment Campaigns</td>
<td>2 Front Desk Scheduling</td>
</tr>
<tr>
<td>• Located in <strong>student emails</strong>, student homepage in desktop site</td>
<td>• Located in <strong>Appointment Center</strong></td>
</tr>
<tr>
<td>• Students receive prompts from an advisor to schedule a specific type of appointment (i.e., registration pin appointment) and select an available time</td>
<td>• Front desk staff schedule, edit, and check students into their appointments via a scheduling grid of available advisors</td>
</tr>
<tr>
<td>3 Student Initiated</td>
<td>EAB &amp; Leadership Team to decide on <strong>student scheduling Go-Live date</strong>, once a majority of advisors have set up availability in the desktop site.</td>
</tr>
<tr>
<td>• Located on student homepage in desktop, or <strong>Navigate Student</strong></td>
<td>• Students proactively schedule their own appointments, navigating through a series of questions to narrow down their options to meet with an advisor</td>
</tr>
</tbody>
</table>

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# Student Phase 1 & 2 Approach

## Phase I

**P1 Users**

- Incoming First Year Students

**P1 Feature Recommendations**

- Customized Intake Survey
- To-Do’s: Orientation/New Students
- Academic Calendar & Resources Center
- Holds Center
- Major Explorer
- Connect Network
- Study Buddies

## Phase II

**P2 Users**

- All Students (First Year to Fourth Year)

**P2 Feature Recommendations**

- Customized Intake Survey
- To-Do’s: All Students & Special Populations
- Academic Calendar & Resources Center
- Quick Polls
- Push Notifications
- Holds Center
- Major Explorer
- Appointment Scheduling
- Connect Network
- Study Buddies
The Role of EAB Administrators

Application Administrator

Expert with an understanding of the overall student support structure on campus, basic technical knowledge, and larger rollout strategy

Responsibilities:

User Roles/Permissions Setup
• Understand and create user roles
• Manage permissions by user and by role

Initial Site Setup/Site Configurations
• Own building locations and services with workflow team along with other site configurations

Ongoing Support
• Maintain user access, roles, and permissions
• Modify any site-wide configurations
• Collect issue reports and enhancement requests
• Coordinate with technical team to troubleshoot data issues related to import files, log-in issues, etc.

Content Administrator

Guide content manager—has functional knowledge of advising and the student lifecycle, can coordinate additional content reviewers on campus

Responsibilities:

Publisher Role
• Adapt prepopulated EAB content with customized language for the institution into content management system
• Configures content to align with campus due dates
• Publishes finalized content

Content Development Role:*
• Works closely with content development team to solicit appropriate content edits
• FUTURE: Segments specialized content based on relevant student subpopulations

Ongoing Support
• Updates content based on new events and information*Content Development responsibilities belong to the Content Development Team Lead, which is a role that the Content Administrator may hold at smaller institutions.