



EAB

Executing on an Appointment Campaign Strategy

UW System Navigate Workshop Breakout Session

- 1 What is a campaign strategy?
- 2 Identifying success & roadblocks
- 3 Discussion: Solving the challenge together
- 4 Share-out: Sharing ideas together
- 5 Planning for Proactive Outreach

Elements of a Campaign Strategy

1

Define a Target Population



Brainstorm a group of students that might need intervention.

Select the parameters that will define this population; Develop watchlist.

Articulate objectives for the short-term and long-term impacts of your campaign.

2

Plan Your Outreach Strategy



Determine interaction type and frequency.

Craft the message keeping in mind the resources you want to provide and action you want the student to take.

Utilize the appointment campaign functionality in the platform to launch outreach.

3

Evaluate and Share Success



Identify metrics for measuring the outcomes of your campaign and targets that will define success.

Determine how you will communicate your campaign's outcomes with key stakeholders.

4

Coordinate Across Units

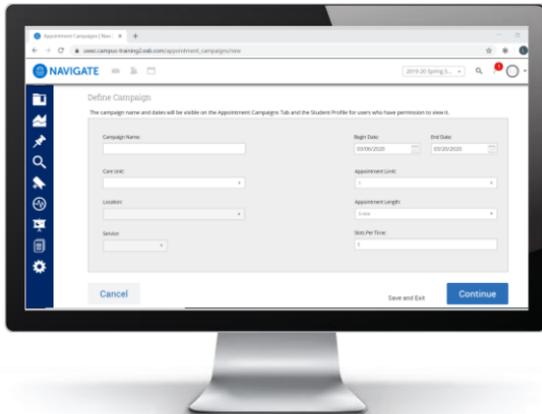


Develop centralized tracking of planned campaigns.

Audit existing campaigns for redundancies and missed opportunities.

Scale efforts by repeating successful campaigns across multiple advising offices or advisors.

Common Pitfalls Campaign Strategies



- 1 Not identifying metrics to assess until conclusion of campaign
- 2 Running one-off campaigns in silos
- 3 Missing opportunities to use targeted campaigns to streamline processes
- 4 Not writing down your intervention plan

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What are some of the **challenges or barriers** you encountered when trying to put a campaign into practice with your campus advising units?

What have been **some key elements of success** if your unit has accomplished this?



Capacity Concerns



"I don't have time to create/send the campaign or meet with these students."

Resistance to Change



"I'm comfortable with the way things are now. Why do we need to do this?"

Lack of Agency



"I'm reaching out to students to address a problem I can't solve."

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Solving the Challenge Together



- Have you heard this challenge on your campus before?
 - What previous experience or additional context might be motivating this concern?
- Has your campus/group/team overcome a similar sentiment in another situation? Has your campus implemented other changes to advising practice?
 - What were the key elements to accomplishing that?
- What are some small tactics that might help an advisor work around this concern?
 - How can an advising director address these concerns?

Challenges Faced Across the Collaborative



Capacity Concerns



"I don't have time to create/send the campaign or meet with these students."

Example Tactic:

Set aside a small amount of time as a unit or team for planning and campaign execution to lift the burden from an individual advisor.

Resistance to Change



"I'm comfortable with the way things are now. Why do we need to do this?"

Example Tactic:

Elevate the importance of proactive outreach by Creating collective and collaborative space to share out success and impact of advising practice on student success.

Lack of Agency



"I'm reaching out to students to address a problem I can't solve."

Example Tactic:

Re-evaluate campaign metrics to ensure alignment between intent of campaign and available resources.

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