

Navigate360 Training Resources and Onboarding Techniques

Strategy Conversation

Meet Your EAB Presenter



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Meet Our Partner Presenters



Becca Allan

*Digital Innovation
Coordinator, Student
Success*

Georgian College



Megan Fenton

*Director, Student
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Georgian College



Katie Cartmell

*Director, Office of
Advising Technology*

North Carolina State
University

1

Training Practices to Promote Success

2

Partner Highlight: Creating FOMO at Georgian College

3

Partner Highlight: Building Depth of Knowledge at NC State

4

Small Group Discussions

5

Closing Thoughts



Have a Plan

Identify specific goals for training efforts.
Ensure goals map to student success priorities.



Use Your Resources

Leverage EAB resources, institutional technologies, faculty champions, and established communication streams.



Level Up

Consistent evaluation of training efforts to determine gaps and additional supports needed.

Building Out a Successful Training Approach

Identify Goals

What are your current training goals with end uses on your campus?



⋮

Define Learning Objectives

How do you frame the “what’s in it for me” for each user/unit?

⋮

Implement the Plan

Execute the who, what, and where.

Evaluate

How are you evaluating the success of your current trainings?

CASE STUDY

Georgian College

Background



Degree-, diploma-, and certificate-granting Canadian institution



12,488 full-time students
across 7 distinct campus
locations



Implemented Navigate360
in fall 2022

Challenge

- Grow reach of Navigate360 through broadening the coordinated care network
- Create an unrivaled student experience delivering a seamless and intuitive service experience for students

Early Foundations to Onboarding Success



Communicating Early and Often to Build Buy-In and Stakeholder Engagement



Setting Up for Training Success:

- ✓ Communicated goals around platform use and impact on students
- ✓ Clearly articulated asks for user groups, including features to use
- ✓ Provided preview of resources and plan for ongoing user support
- ✓ Phased training and implementation from beginner to advanced levels

Using a Phased Training Approach with Faculty

Building a “Fear of Missing Out” (FOMO) Campaign Through Gradual Rollout

FIRST TERM



Start Simple to Build Buy-In

- Deployed “FOMO” communication campaign to create hype and interest
- Highlighted only two key features – issuing alerts and adding notes
- Shared one-pager “tip sheets”

SECOND TERM



Slowly Introduce Additional Features

- Introduced additional capabilities as bonus “extras”
- Launched small progress report campaign pilot
- Word of mouth helped increase interest in Navigate360

THIRD TERM



Continue to Grow Reach and Impact

- Expanded progress report campaign to large cohort of students
- Began to onboard Program Coordinators who oversee departments/programs
- Offered in-person and virtual support sessions for users



Be willing to pivot and adjust plans as necessary as implementation progresses

TIP SHEET
ISSUING AN ALERT/REFERRAL

1) FIND THE STUDENT
Using the search bar at the top you can search by student name or student number.

2) ISSUE AN ALERT
From the right hand menu select the option to issue an alert.

3) IDENTIFY ALERT/REFERRAL FROM MENU
Add appropriate comments and information to support.

Example “Tip Sheet” as Training Resource

Embedding 'Train the Trainer' Approach to Care Unit Onboarding

Standardized Processes to Efficiently Grow Reach



Robust Training Within Care Unit Implementations

- Standardized processes for efficient onboarding
- “Train the Trainer” sessions for every Care Unit Leader
- Training resources encourage self-guided troubleshooting and ongoing learning

Ongoing Training and Supplemental Resources

- Care Unit Leads meet monthly for ongoing collaboration
- Drop-in support sessions, in-person and online
- Step-by-step detailed instructions online
- Peer-to-peer support encouraged
- Hold Academic and Service Department presentations
- Program newsletter articles

Evaluating and Celebrating Results

Results Achieved at Georgian College One Year PostNavigate360 Go-Live


Progress Reports

 **70%**
Faculty response rate

 **7,000+**
Completed progress reports

 **700+**
Alerts issued


Staff Utilization

 **73**
Distinct staff/faculty users

 **6,200+**
Appointments documented

 **127K+**
Communications sent to students

Ongoing Momentum

 **15+**
Care Units on "wait list" eager to onboard

- Created internal "idea portal" to **gather requests to use Navigate360** to support campus processes
- Have used growth to develop a **coordinated collaborate communication plan**

Sharing and Celebrating Results with Campus Community



CASE STUDY

NC State University

Background



Public, land grant, R1 university



27,000 undergraduate
students enrolled in
300+ degree programs



Implemented Navigate360
in fall 2018

Challenge

- Low adoption of certain features/functions in Navigate360 among professional staff
- Needed to build trust among end-users and expand access to data in order to scale capacity for support provided by the Office of Advising Technology



Approach to Training

A Collaborative Strategy

Leverage Existing Resources



Support provided by the Office of Advising Technology

Focus on consistent experience for students, including expansion outside of advising

Rebranded existing training into two opportunities: Navigate360 Basics & Maximizing Navigate

Invest in Individuals



Met with colleagues individually

Focus on critical program-level questions and identifying students in need of support

Opportunity to gauge resource utilization

Shared Training Opportunities



Group training on advanced search and reporting functionalities

Led by a member of the User Council

16 colleagues across 12 departments

+11%

More students using the Navigate360 Student App

+9%

More appointments created via Navigate360 from fall 2022 to fall 2023

+30%

Increase in reports run between Oct 2022 and Oct 2023

Training Opportunities Support Users Across Campus

Including Navigate360 Basics, Maximizing Navigate360, and Weekly Office Hours



Office of Advising Technology Training Schedule

Navigate NC State Training Updates

Based on participant and user feedback, we've made some exciting changes to both our Navigate Basics workshop and our Maximizing Navigate training series. We will offer several group training sessions, including an expanded Navigate Basics series that allows us to better tailor users' introduction to Navigate to their needs. New to the Maximizing Navigate series this fall will be *Advanced Search & Student Lists* and *Reporting*. These workshops will explore using these functionalities in conjunction with other tools to maximize your Navigate user experience.

Navigate Basics

Navigate Basics is a two-part training series that covers the core functionalities of Navigate NC State to help professionals begin using the student success platform.

Navigate Basics: Getting Started

In this workshop, we will cover the basics of Navigate NC State including accessing Navigate, viewing your staff home page and dashboard, integrating Navigate with your calendar, and creating meeting availability in Navigate.

Navigate Basics: Working with Students

In this workshop, we will cover the basics of working with students using Navigate NC State including accessing and understanding key information on the student profile, documenting interactions, connecting students with campus resources, and discussing best practices for using Navigate NC State to work with students.

Maximizing Navigate

Workshops in our Maximizing Navigate series highlight a specific feature and focus on how to use the tool to maximize your impact on student success using the Navigate NC State platform. These sessions assume participants have a basic understanding of Navigate NC State and/or have completed the Navigate Basics workshop series.

Workshops in this Series Include

- ★ **Advanced Search & Student Lists**
In this workshop, we will cover how to use the Advanced Search feature within Navigate NC State to search for students. We'll also discuss how users can create student lists and pair the Navigate Advanced Search with other Navigate features for a robust and strategic approach to your work with students.
- ★ **Appointment Campaigns**
In this workshop, we will cover how to use Navigate NC State Appointment Campaigns to strategically reach out to a specific group of students and invite them to schedule an appointment with you.
- ★ **Messaging Campaigns**
In this workshop, we will cover how to use Navigate NC State Messaging Campaigns to strategically reach out to a specific group of students and share information via email or text messaging.
- ★ **Reporting**
In this workshop, we will cover the various Reports users can access with the Navigate NC State platform. We will also explore functionalities to help automate reporting and discuss some ways the data gleaned from the *Maximize reporting* can be utilized to maximize your work with students.

Weekly OAT Office Hours

The Office of Advising Technology will hold weekly office hours on Fridays from 11:00 AM to 12:00 PM via Zoom throughout the semester. Office Hours are loosely structured topic-based sessions where the Advising Technology team will share updates, highlight various Navigate features, and answer questions from campus users. There is no need to register ahead of time for these sessions and we use a standing Zoom link.

Keys to Future Success

Continuing the Momentum

1

Engagement Outside of Advising

Continue to engage with faculty and staff to show the value of Navigate360 and potential for streamlining the student experience

2

Expanding Collaborations

Involve stakeholders through venues such as the User Council to share the load of training end-users

3

Resource Connection

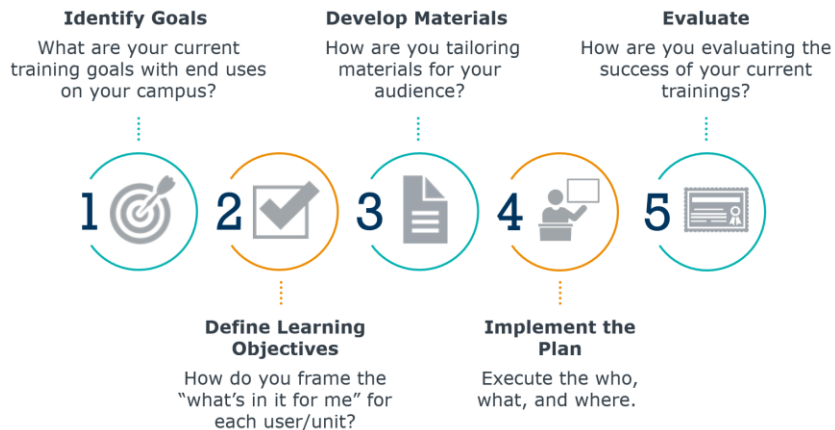
Encourage end-users to share resources across departments to allow for peer-to-peer training opportunities



Discussion Questions

For your institution:

- What is one goal or current barrier to success that could be addressed through training?
- Which strategies did you hear from the presenters today that you'd like to incorporate into your training strategy to increase breadth and depth of utilization?
- Consider past or current training structures:
 - What has worked well?
 - What has not worked well?
 - What training structure or strategies will be scalable?
- How will you define and measure success of your training strategy?



Training Lesson Plans

- [Beginner Training](#)
 - Getting Started
 - Managing My Schedule
 - Communicating with Students
- [Intermediate Training](#)
 - Documenting Student Interactions
 - Identifying Populations
 - Campaigns
 - End-to-End Alerts
- [Advanced Training](#)
 - Identifying In-Need Students
 - Tracking Impact

Training Guides

- [Navigate360 Staff Quick Start Guide](#)
- [Navigate360 Student Quick Start Guide](#)

Foundational Materials

- [Developing and Effecting Training Plan](#)
- [Onboarding New Users](#)
- [Faculty Training Toolkit](#)

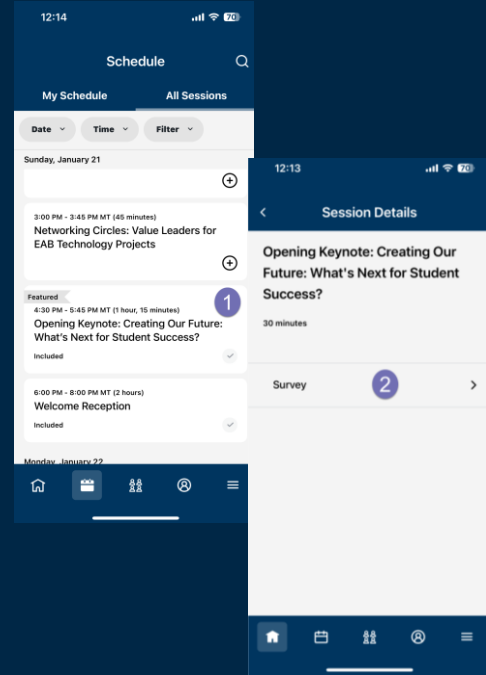
Complete Session Evaluations

Your feedback is important to us, please take a few moments to **tell us about your CONNECTED experience.**

Evaluations are available in the event app by clicking on a session and then clicking **Survey**.

Need help with the app?

Stop by the **information desk!**



CONNECTED24

Join us tonight for a
CONNECTED Celebration!



Join us at **5:00 p.m. in the Aurora Ballroom B-D** to celebrate with your colleagues and peers.

Bites, drinks, and fun provided



Next Up: **Lunch!**

Head straight to Aurora Ballroom A located on the 2nd floor.

Lunch is being served family style – it'll be ready for you at your table. Refer to your badge to locate your table number. There will be staff on hand to help direct you.



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