

## Streamlining Your Workflows by Maximizing Navigate360 Functionality

Transformation Lab

## Meet Your Presenters



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1

## Learning Objectives

2

Increasing Capacity by Scaling Outreach and Intervention

3

Automations and Other Tools

4

Discussion/Q&A /Workshopping

# What We Hope You Take Away from Today



1

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Describe the **benefits of structured, scaled outreach** and intervention

2

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**Identify two existing campus operations that can be enhanced** by automations within Navigate360

3


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Articulate **how automation(s) can be configured** within Navigate360

## CONNECTED24

### Streamlining Your Existing Processes

Existing Process #1	<b>Examples</b> <ul style="list-style-type: none"><li>• Re-enrollment outreach</li><li>• Probation outreach</li><li>• Early alert</li></ul>	Existing Process #2
Ideas for Streamlining	<b>Examples</b> <ul style="list-style-type: none"><li>• Case workflow audit</li><li>• Looking at relationship types</li><li>• Automating "tier 1" outreach</li></ul>	Ideas for Streamlining
Navigate360 Tools to Accomplish	<b>Examples</b> <ul style="list-style-type: none"><li>• Campaign nudges</li><li>• Messaging automations</li><li>• Creating new categories</li></ul>	Navigate360 Tools to Accomplish
One Concrete Next Step	<b>Examples:</b> <ul style="list-style-type: none"><li>• Meet with App Admin</li><li>• Train staff</li><li>• Assemble team for case workflow audit</li></ul>	One Concrete Next Step

 EAB

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**Hold on to this; we'll turn to it later in the session!**

1

Learning Objectives

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## **Increasing Capacity by Scaling Outreach and Intervention**

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# The Anatomy of Outreach

## Key Tenets of Successful Student Outreach and Intervention



### Timing

When does the outreach occur?

- Proactive versus reactive to events
- Strategic planning to avoid communication fatigue
- Getting students what they need, when they need it (relevance)



### Populations

Who is receiving the outreach?

- Is it bespoke for various groups (differentiated care) or “one size fits all”?
  - A combination of both across your calendar is a good thing!



### Owners

Who sends the outreach and owns follow-up?

- Is the communication requesting that the student take an action? What is it?
  - Who tracks that action or follows up?
- What voices do recipients prioritize?



### Metrics

What happened, and how is it measured?

- Process metrics
  - How will we know the outreach is working?
- Outcome metrics
  - How will we measure success of the outreach?

## How would you describe the current state of intervention planning at your institution/department?

We review our processes every year

0%

On an as-needed basis

0%

We don't (but we should)

0%

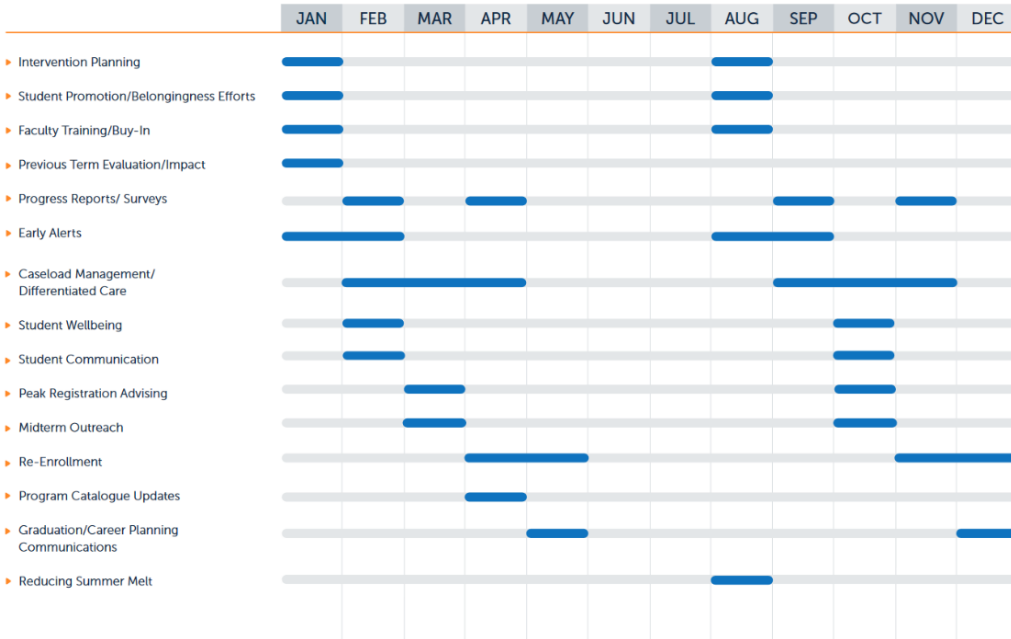


# A Framework

## Student Success Annual Calendar

As a Navigate or Starfish partner, your technology can help you support students throughout their educational journey. Use this graphic to focus your efforts on key priorities across the year.

Topics and Tasks to Focus on Throughout the Year



## Provide Baseline Support



Ensure students have self-service access to resources and support from all areas of campus.

- Standardized Appointment Scheduling and Check-In
- Consistent Reporting of Student Interactions
- Intentional Registration Reminders
- Resource and Milestone Communications
- Ease of Academic Planning
- Simplified Student Course Scheduling

## Monitor Student Concerns and Feedback



Actively surface additional student needs and equity gaps.

- Feedback Goal Setting and Prioritization
- Faculty Raised Concerns and Positive Alerts
- Staff Raised Concerns and Positive Alerts
- Student Raised Concerns
- Data Informed Support

## Scale Actions and Differentiate Care



Tailor student support based on need, coordinating and automating whenever possible.

- Coordinated Outreach Calendar
- Differentiated Outreach Calendar
- Intervention Pathways for Concerns and Alerts
- Evaluation of Intervention Effectiveness

1

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**Automations and Other Tools**

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Discussion/Q&A /Workshopping

## Which streamlining mechanisms in Navigate360 is your office or institution currently leveraging? (select all that apply)

Automated alerts

0%

Automated messages

0%

Custom relationship types

0%

Auto-assignments to relationships

0%

None of the above

0%

Start the presentation to see live content. For screen share software, share the entire screen. Get help at [pollev.com/app](https://pollev.com/app)

# Automations Overview

## What are Automated Actions?

**Workflows built on the following logic:** If X, then Y.

- X = a student meets the criteria of a specific saved search
- Y = send a message (SMS or email) OR issue an alert

## Sample Messaging Automations

### Intake Survey Responses

Email all students who say they are interested in certain resources with a message to connect (exclude initial matches)

### New Assigned Students

Email students with what to expect in the coming year + your Personal Availability Link- PAL (exclude initial matches)

### Category-Based

Email all first-generation students with a welcome message

## Sample Alert Automations

### Summer Melt

Issue an alert on any students who have 0 enrolled credits in the upcoming term (exclude initial matches)

### FAFSA Completion

Issue an alert for students with a category "FA info needed" coming from the SIS

### Missed Success Markers

Issue an alert for any student who has missed success markers

# Conditions and Scheduling

## Automation Conditions

Choose a Saved Search to specify the criteria students must meet for inclusion in your automation. Then choose the action you would like to take when students meet the Saved Search criteria. Choose any additional selection based on the automation action. Note that you will need to set these up in advance.

IF... students match the criteria in this saved search \*

Transfer1-1.5GPA X ▾

[Preview Saved Search ↗](#)

THEN... take this action \*

Issue Alert ▾

## Automation Schedule

Specify how long the automation should run. Then choose how often you want to check for new students that match the criteria. Any new students who meet the criteria will be added to the automation and the action will be applied on this schedule. You will be notified by email 2 hours before each automation run. You will be able to review a list of students included in the automation and have the opportunity to cancel an automation run or to omit individual students.

## Automation Duration

How long would you like your automation to run?

Start

January 1, 2024 ▾

End

April 1, 2024 ▾

## Automation Frequency

How often should we check for new matches? The selected action will be processed at the interval and time of day in your institution's time zone, subject to processing time delays.

Daily

Weekly

Day \*

Tuesday ▾

Monthly

Time \*

12:00 PM ⌚

# Advanced Search

### New Search

Saved Searches +

Keywords (First Name, Last Name, E-mail, Student ID)  Type

**Student Information** First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List, Last Login to LMS

**Enrollment History** Enrollment Terms

**Area of Study** College/School, Degree, Concentration, Major

**Term Data** Classification, Section Tag, Term GPA

**Performance Data** GPA, Hours, Credits

**Course Data** Course, Sections, Status, LMS Activity

**Assigned To**

**LMS Assignments** Assignment Type, Status, Points?

**Goals & Interests** Post Degree Goal, Favorites?

**Academic Plan** Planned Terms, Plan Warnings?

**Polls** Questions, Choices?

**Success Indicators** Predicted Support, Success Markers

**Nav Info** Milestone Filters

Include Inactive  My Students Only

## Popular Advanced Search elements for automation:

- Success Markers
- Full-Time Status
- New Assignment

# Categories

- Categories are system-wide identifiers or student attributes that are used to **group students into cohorts**.
- Users can view these categories on a student's profile and as a single student. They can also use these categories as a filter in the Advanced Search feature to **identify students who meet specific criteria**.
- Popular Categories for automation:
  - **Academic Probation/Notice**
  - **Holds**
  - **Missed Success Markers**

The screenshot shows a 'New Search' form with the following sections:

- Saved Searches**: A dropdown menu.
- Keywords**: A text input field for 'First Name, Last Name, E-mail, Student ID?'. The 'Type?' dropdown is set to 'Students'.
- Student Information**: A section with the following fields:
  - First Name?**: Text input field.
  - Last Name?**: Text input field.
  - Gender**: Dropdown menu set to 'All'.
  - Race**: Dropdown menu set to 'All'.
  - Category (In Any of these)?**: Dropdown menu set to 'All' with a plus sign icon.

A dropdown menu is open from the 'Category' field, listing the following categories:

- Honor Roll (A7)**
- International Student (A8)
- Lacrosse (A13)
- Pell Eligible (A19)
- Rock Climbing Club (A17)
- ROTC (A14)
- Rugby (A15)



# Key Considerations

1

**If...Then...**

Always begin with your "If...Then..." Statement

2

**Start with small workflows with a big impact**

Look for simple, repetitive business processes that occur in summer and are executed by a small group of staff

3

**Track permissions closely**

Automations can be viewed only on an individual user's saved lists and searches page

4

**Understand the logic for your search parameters**

Check the email confirmation every time (put a hold on your calendar to make sure you are available)

5

**Consider excluding initial matches carefully**

In many cases, it will make sense to exclude initial matches

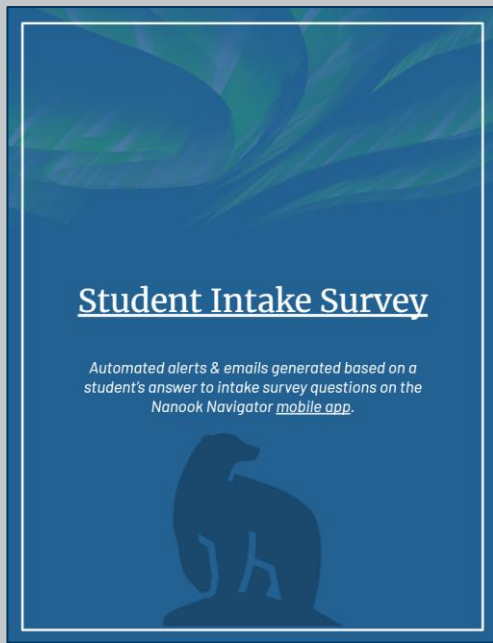
6

**Define success from the outset**

Consider how to measure time saved, output, frequency of errors, or another KPI (key performance indicator)

# Intake Surveys – Inspiration from University of Alaska Fairbanks

## A Great Place to Start



## Student Intake Survey

Automated alerts & emails generated based on a student's answer to intake survey questions on the Nanook Navigator *mobile app*.

**Student Intake Survey: All possible responses**  
 Note: Not all responses trigger an automated alert. See the following pages for more information.

What is the best way to reach you?	<input type="checkbox"/> Email me at my UADonline preferred email address <input type="checkbox"/> Text me <input type="checkbox"/> Call me
------------------------------------	---

**\*Hyperlinked responses lead to automated email.**

<input type="checkbox"/> I am working 10 or more hours a week throughout the academic year <input type="checkbox"/> I am new to UAF <input type="checkbox"/> I am returning after a semester or more away from college <input type="checkbox"/> I am unsure how to schedule an appointment with financial aid <input type="checkbox"/> I am a full-time caregiver for 1 or more family members <input type="checkbox"/> I am unsure of career opportunities <input type="checkbox"/> When off campus, I do not have access to a reliable computer or device <input type="checkbox"/> When off campus, I do not have access to a reliable internet connection to access my classes and coursework <input type="checkbox"/> I do not feel ready for this semester <input type="checkbox"/> I am considering withdrawing/dropping out from classes for the rest of the term. <input type="checkbox"/> I am concerned about transportation to get to my classes at UAF <input type="checkbox"/> I want to meet with a student success professional to discuss concerns <input type="checkbox"/> None of these apply to me	<input type="checkbox"/> I plan on attending part time <input type="checkbox"/> I plan on attending full time <input type="checkbox"/> I plan on attending 51% or more of my courses distance (online, phone, video conference with a meeting time) <input type="checkbox"/> I plan on attending 51% or more of my courses distance (NO meeting time) <input type="checkbox"/> I plan on attending 51% or more of my courses in-person <input type="checkbox"/> I plan on attending some distance courses and some in-person (various modalities) <input type="checkbox"/> I plan on exploring other majors <input type="checkbox"/> I plan to attend graduate or professional education after graduation <input type="checkbox"/> None of these apply to me <input type="checkbox"/> Study abroad opportunities <input type="checkbox"/> Internship opportunities <input type="checkbox"/> On-campus job opportunities or work study <input type="checkbox"/> Volunteering service <input type="checkbox"/> Leadership opportunities or campus involvement <input type="checkbox"/> Services for students with disabilities <input type="checkbox"/> Resources and involvement with equity, diversity, and inclusion <input type="checkbox"/> Mental health counseling/resources <input type="checkbox"/> Access to additional assistance programs (food, housing, clothing, etc.) <input type="checkbox"/> Tutoring Services <input type="checkbox"/> Academic Coaching <input type="checkbox"/> Undergraduate Research <input type="checkbox"/> None of these apply to me
---	---

I want UAF to know...

<input type="checkbox"/> I want to learn more about the following at UAF...	<input type="checkbox"/> None of these apply to me
---	--

**Student Intake Survey: Automated Email: Technology**

**Who & When**

**No alert associated with this automation.**

**Automated email from the Following Response(s):**

- I want UAF to know: When off campus, I do not have access to a reliable computer or device.
- I want UAF to know: When off campus, I do not have access to a reliable internet connection to access my classes and coursework.

**Email Sent to Student**

**Subject:** UAF in-take survey response resources

Hi {Recipient\_name}

Thank you for completing the **Navigate Student Mobile App** in-take survey. Please see this  **flyer for more information** connected to the following responses:

- When off campus, I do not have access to a reliable computer or device
- When off campus, I do not have access to a reliable internet connection to access my classes and coursework

Please let us know if you have any questions or additional concerns at [uaf-nanooknavigator@alaska.edu](mailto:uaf-nanooknavigator@alaska.edu). We can connect you to a support office or your **academic advisor**.

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## Intake Survey

### Inspiration from Montana State University

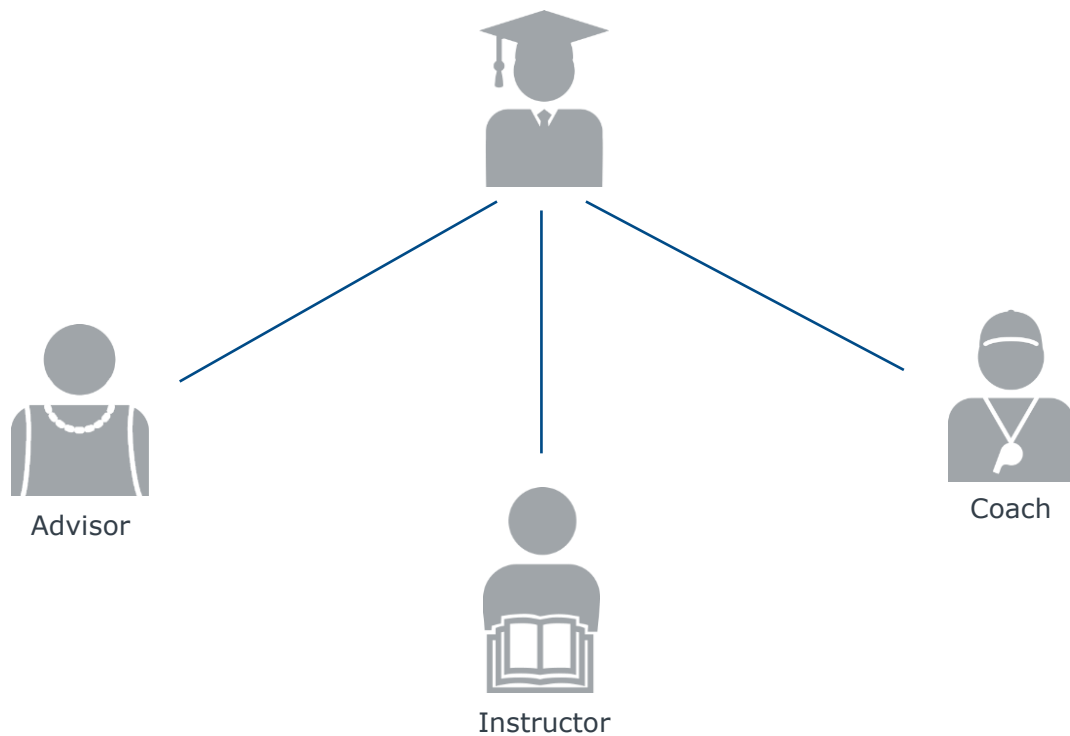
“

We just rolled out Automated Actions this semester – we’ve employe them in relation to particular responses on our Intake Survey... I am the primary persona managing our day-to-day implementation of Navigate... so automation has become a necessity capacity-wise to be able to connect students with supports...

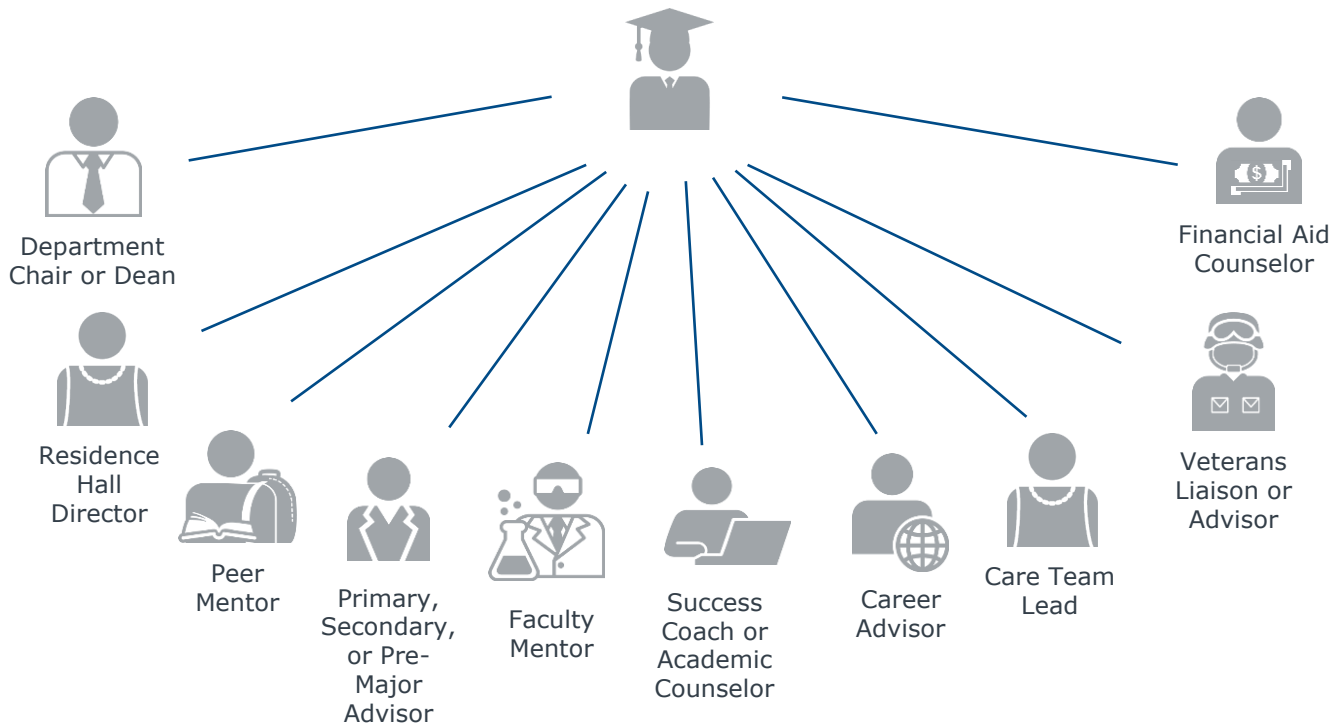
*Katharine Moffat, Retention Director, via  
the Navigate360 Community*

”

# Relationships in Navigate360

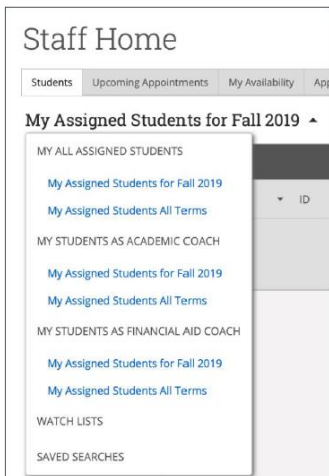


# Common Relationships to Consider Adding

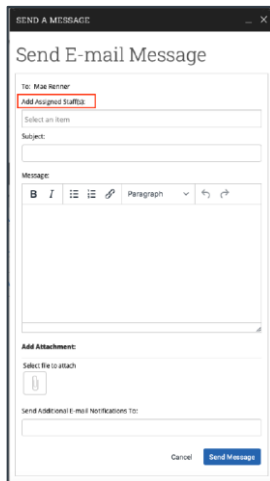


# What Do Custom Relationships Impact?

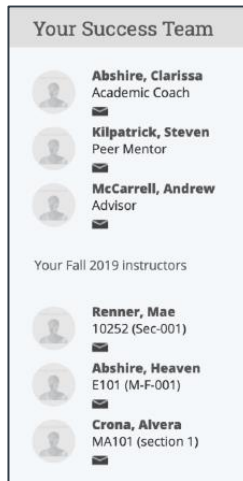
Anywhere Assigned Advisor Options Exist Today, Custom Relationships Are Available



**Assigned Students on the Staff Homepage Appointment Options Available for "Assigned Staff"**



**Email and Texting**



**Success Team on a Student's Profile in Navigate360 Staff Success Team in Navigate360 Student App\*  
(\*Optional)**



**Automatic Alert Email Notifications Case Auto-Assignments**

*Note: Assigned Staff Also Available in Advanced Search and Applicable Exports/Reports*

# The Mechanics



## There are multiple ways to add or update staff-student relationships in Navigate360

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- Automation Through Nightly Files
- Auto-Assignment by Major or Category
- Flat-File Import (CSV)
- Manual Assignment

**For more info on each of these methods, see the final slide of this presentation's appendix.**



# Inspiration from Iowa State University

## Step 1

Decided to implement a **case management model** using alerts and cases **to support re-enrollment processes**

## Step 2

Created **specific alert types** for "Re-Enrollment: Not Registered:

- Hold
- Advisor
- Financial
- No Holds
- Probation Hold
- Student Health

## Step 3

Set up **cases to be auto-assigned** to members of Student Success & Retention team



## Results

Staff across campus **better understand the challenges and needs** of this student cohort. Model has optimized collaboration and communication and streamlined efficiency, **saving hundreds of staff hours** as they send personalized communications to unenrolled students



# Inspiration from Buena Vista University

## Previous State

- Cases were assigned during weekly meeting, resulting in 7-10 day delay in student outreach
- Case management approaches varied greatly, with some cases never closed out
- Many faculty complained about lack of follow up
- Meeting time was spent manually working through lists rather than discussing more serious issues or broader themes

## Solution

- Moved to auto-assign system for early alert staff
- Created Early Alert Case Management Overview document to standardize approach
- Reviewed all alert types and cases and their pathways
- Introduced positive alerts

## Current State

### Across 2022-23 AY

- **Over 2,000 Early Alerts issued, a 38% increase from prior year**
- **94% of cases closed with student intervention or follow-up**



# Additional Inspiration from Across the Collaborative



## Fayetteville State University

- Streamlining the Emergency Aid Assistance process
  - Needed to **break down silos** and **increase efficiency**
  - Piloted in Oct 2022 and made permanent in Nov 2022
  - “Broncos Helping Broncos” **Alert Reason** helps expedite approval process
  - **Cases** allow quick and thorough vetting by all stakeholders in this campus-wide initiative and quicker response time to aid applicants
  - **Central document storage** allows for better coordinated care and follow-up outreach to this critical population



## University of South Alabama

- Custom **Success Markers** for curriculum assessment
  - Needed **scaled way to identify when student had completed core prerequisite courses**, this was only happening IF students proactively scheduled advising appointments
  - Created Success Markers to quickly identify students ready for upper-level courses in biology
  - Entire Department of Biology advising faculty was trained on utilizing advanced tools in Navigate360
  - **Specialized training** was provided for department administrators on how to use success markers for their assessment needs

# Campaign Nudges

## Behavior-Centered Emails Lower the Barriers to Action

### Best Practice Nudging Tactics



Dispel **common misconceptions**

**Myth #1:**

Most students don't qualify for financial aid.

**Fact #1:**

Over 80% of students at ASU receive financial aid.

Drill in on the **task** at hand

**Submit your application by the Sunday, March 1, priority deadline.**

Break process into **component steps** and **link to relevant resources** so students don't have to hunt for them

[✓] Get ASU's college code—it's 001081

[ ] [Retrieve your PIN](#)

[ ] [Figure out](#) if you need your parents' financial information

Send **differentiated messages** at different stages of the process



**8 messages across 8 weeks**

Send from a **specific person** so students feel comfortable responding

Sincerely, Melissa Pizzo  
Executive Director, Financial Aid and Scholarship Service

1

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**Discussion/Q&A /Workshopping**

## CONNECTED24

### Streamlining Your Existing Processes

Existing Process #1	<p>Examples</p> <ul style="list-style-type: none"> <li>Re-enrollment outreach</li> <li>Probation outreach</li> <li>Early alert</li> </ul>	Existing Process #2
Ideas for Streamlining	<p>Examples</p> <ul style="list-style-type: none"> <li>Case workflow audit</li> <li>Looking at relationship types</li> <li>Automating "tier 1" outreach</li> </ul>	Ideas for Streamlining
Navigate360 Tools to Accomplish	<p>Examples</p> <ul style="list-style-type: none"> <li>Campaign nudges</li> <li>Messaging automations</li> <li>Creating new categories</li> </ul>	Navigate360 Tools to Accomplish
One Concrete Next Step	<p>Examples:</p> <ul style="list-style-type: none"> <li>Meet with App Admin</li> <li>Train staff</li> <li>Assemble team for case workflow audit</li> </ul>	One Concrete Next Step

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## Efficiency Process-Mapping Worksheet

- Start with two existing outreach/intervention processes at your campus/department.
- From our conversations today, brainstorm ideas for how to streamline each process.
- Think about what tools/workflows in Navigate360 might be helpful.
- Determine one concrete next-step!

# CONNECTED24

## Share Out

Let us know what streamlining work you'll be diving into back on campus.

Don't forget to engage your Navigate360 Strategic Leader for more in-depth planning!

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## Resources

Help Center: [Automated Actions New Feature Spotlight](#)

Community Post: [Automated Actions](#)

Help Center: [Custom Relationship Types](#)

EAB.com: [Student Success Annual Calendar](#)

## Other CONNECTED Sessions

**PAST SESSION: How a Residence Life and Housing Care Unit Provides Holistic Student Support**

Find resources in the app

**PAST SESSION: Scaling Actions and Differentiating Care: Strengthen Your Outreach Strategy for Outsized Impact**

Find resources in the app



# CONNECTED24

## Appendix

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## Alerts Triggered by Observation-Based Risk Assessment

### Success Markers

**Definition:** Success Markers help platform users gauge whether a student is on track in their major by comparing their behaviors and outcomes to standard milestones of degree progress and performance.

A Success Marker can be created based on information obtained via Institution Reports (through the evaluation of graduation trends among key courses) or institutional knowledge or goals.

Note: Success markers are not intended to replace degree audits.

# How Success Markers Work



## Anatomy of a Success Marker

- **Important milestone course for the major** (e.g., Chemistry 101)
- **Minimum recommended grade** (e.g., B-)
- **Appropriate timing** (e.g., 0 – 30 credits)

## Success Marker Statuses

- ✓ Success Markers already **completed**
- X Success Markers **missed** due to grade or timing
- Success Markers that are **upcoming**

# Success Markers in the Platform



## Summary of All Success Markers in the Success Progress Tab

**Success Markers**  
The student has missed guidelines for progress. Acting on them can help get the student back on track for successful completion.

3 missed markers

Notification	Outcome
<b>ACCT2101</b> Recommended grade: B- (1 course) Complete between 30 and 60 credits	Needs attention 2 Attempts
<b>BUSA2106 and CIS2010</b> Recommended grade: B- (2 courses) Complete between 45 and 60 credits	Needs attention 2 Attempts
<b>ECON2105 and ECON2106</b> Recommended grade: B- (2 courses) Complete between 15 and 30 credits	Needs attention 2 Attempts

## Number of Missed Success Markers on a Student's Overview Page

**Thady Ourada**

Course Grade	Passed Courses	Withdrawn Courses	<b>Missed Success Markers</b>	Cumulative GPA
0	1	5	<b>4</b>	3.86

Credits attempted for Spring 2015: 22 credits, 8 classes

Year Credits Earned: 67.31

Credits Completion % at this institution: 70%

**English**  
with a concentration in Literature  
College of Arts & Sciences

STUDENT ID: 738490541

CLASSIFICATION: Junior

NEXT RECENT ENROLLMENT: Fall Semester 2014

## Success Markers and Number of Missed Success Markers as Filters in the Advanced Search

Success Indicators Risk, Success Markers

Risk (In Any of these) <sup>?</sup>	# Missed Success Markers > <sup>?</sup>	# Missed Success Markers < <sup>?</sup>
All		
Success Marker (In All of these) <sup>?</sup>	Success Marker Status <sup>?</sup>	
All	All	

## An Ongoing Process

Determine whether all, some, or a few programs should have Success Markers available in the site. Institutions often start with 3-5 markers for a major and grow/modify these over time. Your institution may start by building out Success Markers for just 2-3 majors.

# What Do Custom Relationships Impact?

## Student Profile Access Can Be Limited to Assigned Student Populations

### Profile Access Based on Assigned Staff

**Student Profile**

View Student Profiles

- View Student Profiles for All Students
- View Student Profiles for Only Certain Students
  - View Only Assigned Students' Profiles
  - View Only Profiles of Students Enrolled in Their Class

David Johnson

Overview Success Progress History Class Info Major Explorer Path Academic Plan More

Course Grade GPA	Repeated Courses	Withdrawn Courses	Missed Sessions/Markers	Cumulative GPA
1	2	0	0	2.98

Total Credits Earned: 35.00

Credit Completion % at this institution: 100%

Risk: **Moderate**  
[View detail](#)

**Music**  
Bachelor of Music  
with a concentration in Instrumental Music  
Education  
College of Arts & Sciences

STUDENT ID: 063397350  
CLASSIFICATION: Sophomore  
MOST RECENT ENROLLMENT: Fall Semester 2017

**\*Enables access to student profiles for specific student populations**

*To date, options have existed only for limiting Assigned Advisees or Professors' Students in Courses.*



# Four Ways to Implement Relationship Types

## Options for Adding or Updating Staff-Student Relationships

### Automation Through Nightly Files

- For partners implementing Navigate360, work with your Implementation BA
- For partners live on Navigate360:
  - Members will be slotted throughout spring for updates based on interest and capacity
  - Let your Strategic Leader know as soon as possible if you would like to make a change in early spring
  - Submit a Change Request form to the Member Support Team with the details

### Auto-Assignment by Major or Category

- Under each user profile or through the Administration “Edit a User” page, you can choose to “Edit User Settings” and then select the appropriate Auto-Assignments by Major or Category on the bottom, right-hand side
- Assignments are updated nightly as Majors and Categories change

*\*Consider potential new Categories you may need to add to facilitate new staff-student relationships.*

### Flat-File Import (CSV)

- New staff-student relationships can be manually updated in bulk by importing a CSV relationship file with details of what relationships should be added or removed

### Manual Assignment

- New relationship assignments can be added through the Administration “Mass Edit of Students” page.
- Using the Advanced Search, identify the group of students you want to assign, and choose “Assign to Someone” tab. Then, add to or remove from the selected relationship type with the designated staff member.

*\*Ensure you have a plan for long-term maintenance, including updates, to ensure lists are accurate and the process accounts for staff members switching roles or leaving the institution.*

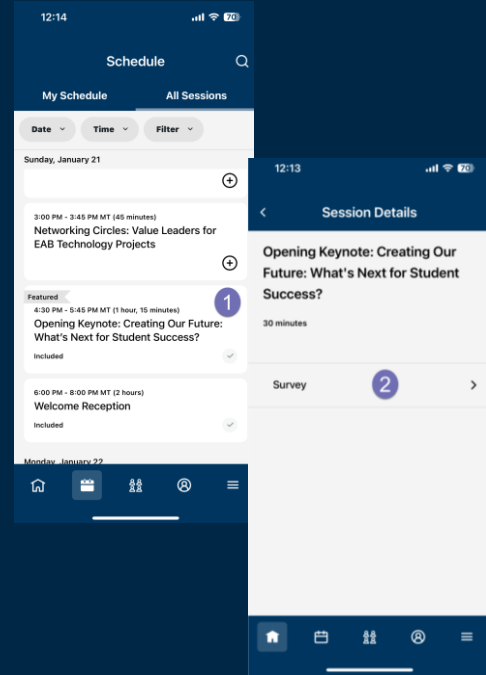
# Complete Session Evaluations

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!**

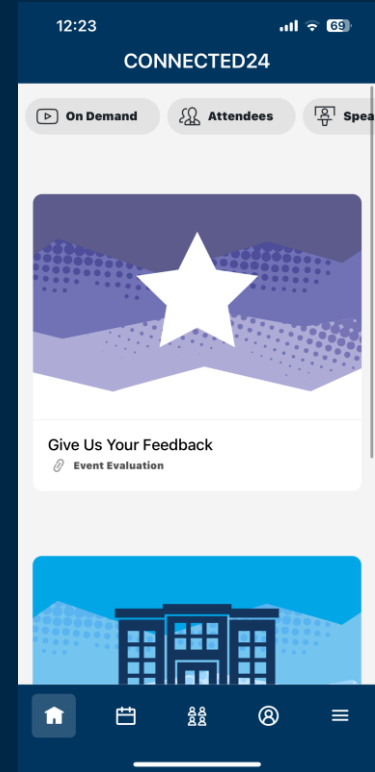


# Complete the Event Feedback Survey

From the front page of the app, click the Give Us Your Feedback box.

**Need help with the app?**

Stop by the **information desk!**



# CONNECTED24

Thank you for joining us for

# CONNECTED24

**Remember to complete the overall event feedback  
survey in the CONNECTED app.**

Travel home safely and we'll see you next year!







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