



# Toolkit: Designing and Implementing a Targeted Outreach Campaign for At-Risk Students

## SSC Targeted Outreach Campaigns

Targeted campaigns enable advisors to direct proactive 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, advisors are able to maximize the impact of their overall efforts.

The SSC platform makes it easier to run campaigns by helping advisors quickly build lists of students that fit certain profiles of interest. By deploying SSC risk analytics in combination with work list filters, advisors ensure that no students fall through the cracks.

This toolkit provides step-by-step instructions and worksheets for designing your own targeted campaign using the SSC platform. Please reach out to your Dedicated Consultant with any questions.

Good luck!

## Advisors use targeted campaigns to...



Make an impact through improved processes for identifying and reaching at-risk students



Focus limited advisor time on manageable groups of students



Efficiently channel proactive outreach, resources, and attention toward groups of students with similar needs



Explore and popularize innovative ideas for data-driven advising practices

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# A Guide to the Targeted 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.5 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 instruction on creating a work list see p. 7)
3. Articulate objectives for the short-term (e.g., rounds of outreach, advising sessions) and long-term (e.g., persistence) impact 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 the appropriate message
6. Identify any next steps you will need to take to follow up with these students and ensure campaign impact
7. (Optional) Export your work list from the SSC platform and use student contact information to send outreach through your university email or CRM system

## Step 3: Evaluate and Communicate Your Campaign Success

8. Identify metrics for measuring the outcomes of the campaign and targets that will define success
9. Determine how you will communicate campaign 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?

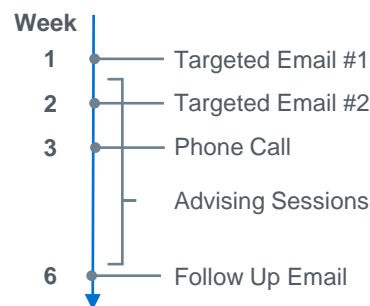
**Parameters Available in the SSC Platform:** student name, college, major, degree, earned credits, number of notifications, enrollment, student status, GPA, risk stratification



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



### Potential Campaign 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 decreased by the next term
- Persistence of the target population

# Campaign Design Worksheet

**SAMPLE**

## Define a Target Student Population

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

*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.*

Parameters I will use to create an SSC work list:

- College: *Business*
- Major: *Management*
- Earned Credits: *30 - 45*
- GPA Range: *2.00 - 2.70*
- Risk Stratification: *High*
- Status: *Currently Enrolled*

Objectives: This 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*

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:

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

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:

Metric	Target	Actual Outcome
<i>Percent of population contacted</i>	100%	
<i>Number of students that complete in-person advising sessions</i>	34	
<i>Number of students that make appointments with the tutoring center</i>	23	
<i>Number of students that improve their academic standing by the end of the following semester</i>	30	

# Campaign Design Worksheet

## Define a Target Student Population

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

Objectives: This campaign will...

- 1.
- 2.
- 3.

Parameters I will use to create an SSC work list:

- 
- 
- 
- 
- 
- 
- 

Total number of students identified: \_\_\_\_\_

## Plan Your Outreach Strategy

Action Steps These Students Need to Take:

My Communication Plan:

Method	Timing/Frequency	Communication Objectives and Resources
<input type="checkbox"/> Email		
<input type="checkbox"/> Phone		
<input type="checkbox"/> _____		
<input type="checkbox"/> Advising Session		

My Follow Up Steps:

## Evaluate Your Campaign Success


Metrics and Target Outcomes:

Metric	Target	Actual Outcome

# Commonly-Used Ideas for Targeted Campaigns

## Student Populations Targeted in Previous SSC Campaigns

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



If you have other ideas for targeted campaigns, send them to your SSC consultant!

# Three Strategies to Extend Your Campaign's Impact

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## **Collaborate to Sustain Momentum**

Run targeted 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 socialize!



## **Build Collective Knowledge**

Don't keep your campaign insights to yourself. Debrief with colleagues after campaign completion 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 Campaigns Generate Best Practices

Central Michigan University, Public Research University in Mount Pleasant, MI

**CMU by the Numbers**

**27,626**  
Total enrollment

**76%**  
First-year retention rate

**54%**  
Six-year graduation rate

## 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 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 proactive outreach, to engage at-risk students in advising and success coaches services

Presentations highlighted critical insights gained through the campaigns initiative, especially around proactive outreach and recommendations for the implementation of future campaigns.

## 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 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

### Central Michigan's Campaigns

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

### Portfolio presentations included:

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

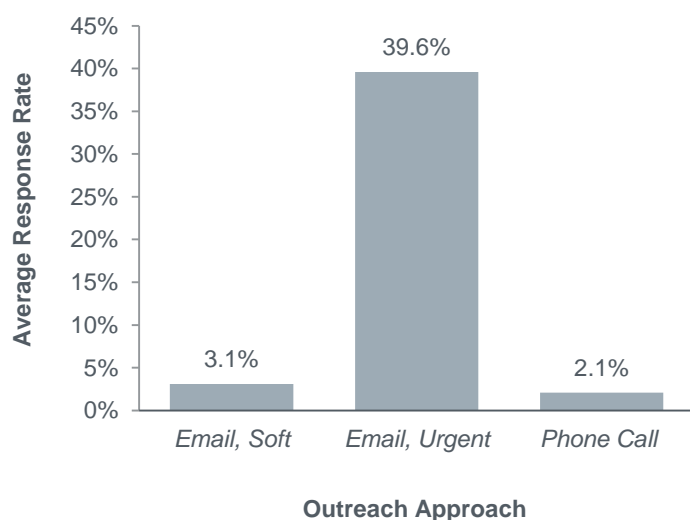
# Building Collective Knowledge on Proactive Outreach

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 proactive 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.”*