



# How to Survive Peak Advising Times

Best Practices for Managing Your Time and  
Your Student Caseload During Registration



## **About EAB Navigate**

EAB Navigate is a student success management system that helps advisors manage their world and guide more students to success. Built based on a decade of research, Navigate was designed to overcome advisors' most pressing challenges. The platform provides predictive analytics for tailored student support; communication, scheduling, and case management tools; and access to a library of advising resources like this one.

# Mastering Inbox Essentials

## Start with Your Desktop

Quick Tips to Save Time Year-Round



## Put Your Signature to Work

Automatic Email Signatures Can Answer Common Questions So You Don't Have to

SAMPLE

**John Lin**  
Success Coach

**Whitehurst University Success Center**  
4455 East State Street.  
[Find on a campus map.](#)  
(202)555-5555  
[Schedule an appointment.](#)

**Important Links**  
**Academic Calendar:** [www.whitehurst.academiccalendar.edu](http://www.whitehurst.academiccalendar.edu)  
**Advising Calendar Dates:** [www.whitehurst/dates](http://www.whitehurst/dates)  
**Academic Standing:** [www.whitehurst.edu/academicregulations](http://www.whitehurst.edu/academicregulations)  
**Advising Policies and Procedures:** [www.catalogue.whitehurst.edu/policies](http://www.catalogue.whitehurst.edu/policies)  
**Advising Syllabus:** [www.catalogue.whitehurst.edu/advising](http://www.catalogue.whitehurst.edu/advising)

SAMPLE

## Reduce Inbox Volume by “Playing Defense”

If You’ll Never Want to Read It, Unsubscribe

**15%** of “deleted items” are from senders you should unsubscribe from



Would you ever want to read an email from this sender? If not, are they going to keep emailing you anyway? Unsubscribe.

If You Can’t or Don’t Want to Unsubscribe, Use “Rules”

FOR EXAMPLE

- Send professional newsletters to a “read later” folder
- Send manager’s emails to a high-importance folder
- Flag emails from important people (or create a rule to format them differently)
- Automatically delete something you can’t (or don’t want to) unsubscribe from

▶ Click File > Manage Rules & Alerts > New Rule

## Reduce Cognitive Load with an Inbox Management Strategy

Two Viable Inbox Management Strategies

1

Items: 0

### Inbox Zero

- Keep as few items in your inbox as possible
- Archive messages you don’t need to act on again in a single folder
- Delete messages you don’t need
- Only retain messages you will need later

2

Items: 18,101

### Inbox Unlimited

- Delete only junk mail
- Respond to relevant messages in the moment
- Use the search function to find old messages later
- Don’t rely on folders or flags

Five Acceptable Actions for Email

*Act on All Emails, Tackling Newest Messages First*



### Delete

If no action is needed, delete it or put it in your archive folder



### Delegate

If someone else can respond, forward it to them



### Respond

If you can respond in two minutes or less, do so



### Do

If you can act on the email in two minutes less, do so



### Defer

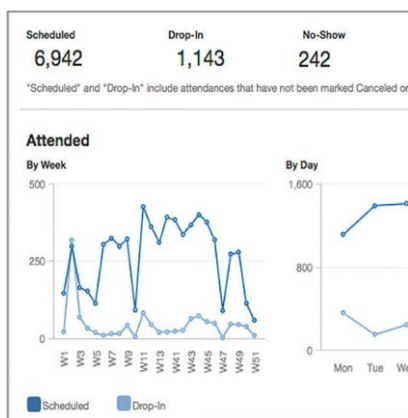
If responding would take more than two minutes, flag for follow-up



### Already an EAB Navigate user?

For more email templates and resources on effective student communications, log in to the Navigate Help Center then click this link: <https://helpcenter.eab.com/hc/en-us/sections/360002829013-Student-Promotional-Materials>

# How EAB Navigate Helps You Survive Peak Advising



## 1 Find Ways to Streamline Your Appointment Processes

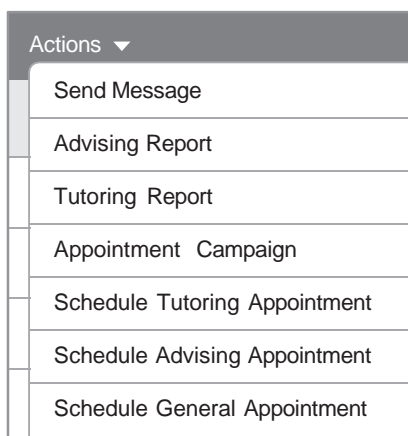
**Advisor Reports** Can Reveal Trends to Help You Better Manage Appointments

### SAMPLE TREND

High number of no-shows or cancellations at a specific time, ex. 9 a.m. to 10 a.m.

### SOLUTION

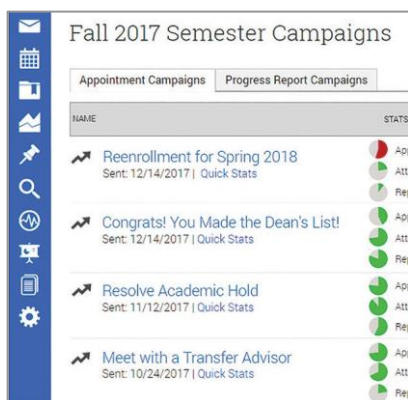
Block off your calendar or adjust your availability; use that time for work other than appointments



## 2 Automate Daily Tasks

**Actions**, Email Sync, and Appointment Reminders Help Save Time on Every-Day Tasks

- The Actions drop-down contains a variety of mass operations you can perform for all students in a given list including sending a message or adding a note.
- Navigate syncs with Outlook and Gmail, so you can track at all email threads in one place. You can also configure automatic appointment reminders.



## 3 Proactively Free Up Time During Your Busiest Periods

**Appointment Campaigns** Can Help You Pull Forward Conversations and Activities

### IDEAS

- Pull forward conversations that would otherwise need to happen during peak time, like mentoring conversations with students who are not in need of a high level of support
- Proactively work to improve students' standing so that they will not experience high levels of support need during a time when you aren't able to provide as much support
- Help students declare a major or move to upper division

### ▶ Already an EAB Navigate user?

For more advising campaign ideas and how-to guides, visit: <https://eab.com/technology/info-graphic/student-success/61-campaign-ideas/>



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## ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at [eab.com](http://eab.com).