Efficiency, Sustainability, and Intentionality in Advising

KARLI HANSEN, NACADA ANNUAL CONFERENCE 2021
AGENDA

Introduction
Intentionality
Sustainability Tactics
Efficiency Tactics
Idea Sharing
I work at a Microsoft Office institution - there will be MS Outlook heavy content to begin. I have found some of the tools in Gmail and will share the limited knowledge I have.

I also utilize MS Excel which could easily be applied to Google Sheets.
KARLI HANSEN

She | Her | Hers

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Intentionality

Student Populations
Sustainability Efforts & Commitments
Generation Z

Tech Savvy
Expect Instant Answers
One-On-One Communication
Career Minded
"We Centric"


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Sustainability Tactics

e-Checksheets
e-Graduation Plans
Follow-Up Emails
Efficiency Tactics

Microsoft Outlook
Mass Emails
Microsoft Excel
MS Outlook

QUICK PARTS (PC / DESKTOP)
TEMPLATES (MAC / WEB VERSION)

DELAY DELIVERY
SAVE SENT TO...
READ RECEIPT

READ ALOUD
CHECK ACCESSIBILITY

HTML. V PLAIN TEXT V. RICH TEXT

TRACKING DATA
What are Quick Parts or Templates and how could I use it?

- Saved drafts that you can drop into your emails as templates.
- *Quick Parts* = PC or Desktop Version
- *Templates* = Mac or Web Version
- Replaces that Word Doc on your home screen that you copy/paste from or scrolling back through sent emails to copy an email you already sent.
What are Quick Parts and how could I use it?

- Advising Follow-Up Emails
- "Please schedule an appointment" Emails
- "You're running late, here is the link in case you can't find it"
- "You missed your appointment, please reschedule (& hope you are okay)"
- Orientation Emails - You can include all messages & delete as you personalize
- Orientation Post-Registration Appt Email
- Anything else you find yourself sending often
Accessing Quick Parts
PC / Desktop Version

[Image of a computer screen showing the Outlook interface with the Quick Parts button highlighted]
Accessing Quick Parts
PC / Desktop Version
Accessing Templates
MAC / Web Version

To
Cc

Add a subject

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When using Templates there seems to be a maximum amount of data you can save.

The desktop version on PC (Quick Parts) have more storage and I have not run into issues with saving copies.
Creating Quick Parts

PC / Desktop

Step 1: Highlight the Selection you want to save.
TIP: don’t include your signature.

Step 2: Click the Quick Parts button.
LOCATED: insert tab.

Step 3: Click "Save Selection to Quick Part Gallery..."
LOCATED: very bottom of Quick Part drop down.

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Creating Quick Parts
PC / Desktop

Note: if you are trying to edit a quick part, you need drop in the original version, edit it and save it again as a new version. Then delete the original.

Step 4: Name & Select / Make Category

Step 5: Click "OK"

Step 6: CELEBRATE, because you are now going to save yourself LOADS of time!
Orientation Preparation Email

Hello XXX,

This email is to help with preparation for Orientation. Please be sure to read this email in its entirety.

**Registration Planning:**
- Attached is your check sheet for Registration. There are 2 pages, so please scroll to the second page before sending any questions.
- The courses listed are the ones being recommended to you that you will have met the pre-requisites for on registration day.
- If there are task items on page 2 (such as Math Placement Tool or CHEM Prep), they need to be completed IMMEDIATELY or it will delay your registration, limiting your access to course options.
  - Once you have completed these tasks, please email me.

**Why were these classes recommended?**
Your classes were recommended based on the information I have, such as:
- AP/IB Test Scores or Predicted Scores
- IB Test Scores or Predicted Scores
- College Transcripts from Dual Enrollment
- CHEM Prep Completion
- Math Placement Tool or Math Placement Exam results
- Enrollment in additional programs such as Honors, Key, PEP (you would know if you are in one of these)

If there is something missing, please let me know ASAP.

**Must Complete Before 11:30 AM on July 15th:**
- Registration Ready Tasks (minus the "Registration Hold" — this will be lifted when you attend Orientation)
- Online Orientation Tasks
- Review the How To Register for Classes Videos from Online Orientation
  - Video 1 — how to get to the registration system
  - Video 2 — the registration layout
  - Video 3 — basic searching and registering
  - Video 4 — scheduling and options

**Next Steps:** After reviewing everything, including your check sheet, please respond to this email with the course you are most excited about and the task items you are going to complete before your Orientation day. Until I receive that email, I will be following up regularly.

Best,
Karli
Hello XXX,

This email is your final preparation for tomorrow’s registration time.

Reminders:
- Please arrive to the morning session by 11:10 AM (MST) so we can get started right at 11:15. You will be in a waiting room until 11:15 when everyone is brought in together.
- Please arrive to the afternoon session by 1:10 PM (MST) so we can get started right at 1:15.

Things To Have Done by 11:15 AM
- Complete the following Registration Ready Tasks
  - INSERT TASKS
  - Chem Prep
  - Math Placement Tool
- If you have received any new AP/IB scores, please email me a screenshot ASAP that shows your scores as well as your information so I can verify it was you.
- Complete Online Orientation
  - Emphasis placed on the registration videos linked below — they are quick watches!
    - Video 1 — how to get to the registration system
    - Video 2 — the registration layout
    - Video 3 — Basic Searching and Registering
    - Video 4 — Schedule and Options
- Revisit these Registration Videos
  - Video 1 — how to get to the registration system
  - Video 2 — the registration layout
  - Video 3 — Basic Searching and Registering
  - Video 4 — Schedule and Options

Things to Finish ASAP (you may not be able to complete them by tomorrow morning, which will mean we will have to connect later to finish registration)
- Math Challenge Exam or Precalculus Tutorial in order to be Math Ready so you can register for Chemistry Courses.
  - Math Challenge Exam is available here, it is a proctored version of the Math Placement Tool.
  - To study for the MCE, check out this resource here.
  - Precalculus Tutorial is available here.

Your Course Recommendations: An updated sheet has been attached.
- VMB8100 (linked course — you need to add the recitation at the same time as the lecture)
- NB192
- LPE102 (linked course — you need to add the lab at the same time as the lecture)
- HONR95 (linked course — you need to add the recitation at the same time as the lecture)
- AUC2
- CHEM111 (linked course — you need to add the recitation at the same time as the lecture)
- CHEM112
- CO150
- ...
Karli's Examples

Potential No Shows

Hello

I wanted to check in as you haven't joined your virtual appointment yet.

You should have received an email after you signed up for your appointment with the link to join, however, just in case that email is lost somewhere, I am also including the link below. I will leave the meeting 5 minutes after the appointment start time if you still haven't arrived and recommend rescheduling at that point.

Link to Appointment: [https://shibb.cvmbcs.colostate.edu/advisingscheduler](https://shibb.cvmbcs.colostate.edu/advisingscheduler)

I hope everything is okay!

Best,

Karli

Schedule an Appt

Thank you for your email! Based on what you shared, it would be best to schedule an appointment and discuss this “in person”. Please use the following link to schedule an appointment: [https://shibb.cvmbcs.colostate.edu/advisingscheduler](https://shibb.cvmbcs.colostate.edu/advisingscheduler).

Best,

Karli
### Follow-Up Emails

<table>
<thead>
<tr>
<th>Subject</th>
<th>Advising Follow-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advising Code: INSERT</td>
<td>Registration Date / Time: INSERT</td>
</tr>
</tbody>
</table>

**Concentration Interest:**

- **Course Options:** HONR193 (3), CHEM113 (3), CHEM114 (1);
  - AP – BMS260; MATH155 or MATH160
  - EPH – ERHS220; MIP260
  - MID – MIP260,

After completing the Concentration Reflection assignment in VMBS100, I will follow-up with information on how to declare your concentration and finalize that decision. After that, I will pass your information on to the concentration advisor to connect with you. Be sure to bring the Graduation Plan you designed in VMBS100 to your first appointment with your concentration advisor.

Best,

Karli
SAVE SENT TO
Good if you are tracking how many emails you send and you don't want to have to file it away separately from your incoming email messages.

READ RECEIPT
Get an alert that a student read an email. Good for: Academic Probation students.

DELAY DELIVERY
Set an email to send at a later time. For those moments you open an email at 8PM and want to respond but don't want a student to know you're available after 4:30PM.
HTML V. PLAIN TEXT V. RICH TEXT

For when you get emails and you are responding but can't use bold / italicize, etcetera.

**First:** Open the email in its own window.
**Then:** Go to Format Text and select "HTML"
Google Gmail

TEMPLATES

DELAY AN EMAIL
Gmail System Users
Templates

1. See all settings
2. Step 2
3. Advanced
4. Enable
5. Templates
6. New Message

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CLICK THE ARROW NEXT TO SEND AND SELECT "SCHEDULE SEND"
Data Tracking & Note Taking

FOR THOSE BACK-TO-BACK DAYS
BY APPOINTMENT TRACKING
Make appointments / empty meetings next to each appointment and add your notes quickly throughout the day that you can transfer. Include # of appts each day.

END OF DAY TRACKER
Make an appointment / empty meeting at end of the day that you put notes in throughout the day that you can transfer.

END OF WEEK TRACKER
Make an appointment / empty meeting at end of week that you put numbers in.

MAKE SURE TO MAKE THESE NOTES PRIVATE AND DELETE THEM AS SOON AS YOU POST THEIR NOTES.
Personalized Mass Communication (Mail Merge)

HOW TO MAIL MERGE
MS WORD
MS EXCEL

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Mail Merge in Google requires an Add On called GMASS
Draft your email in MS Word. Put the areas you want to merge in brackets or other designation to make it obvious. Ex. "<First Name>,," Merged it would become "Karli,"

MICROSOFT EXCEL
Put together or save your list of people, make sure you have headers that are clear "First Name" "Email" "GPA" "not yet meeting expectations" and eliminate any unnecessary data. TIP: add your name and email so you can get an example of it when sending.

MICROSOFT OUTLOOK
Have it open to your sent folder to watch them send.

ALL OF THEM
You will send from MS Word, using data from MS Excel to send through MS Outlook. Be patient with all of them and double check the information (esp when Mercury is in Retrograde).
Hello INSERT NAME,

As your academic advisor, I want to help you complete this semester successfully. According to information I received as part of our Early Performance Feedback initiative, you are not yet meeting expectations in INSERT COURSE.

I’d like to meet with you to discuss academic resources, help you reevaluate your academic success strategies, and share information about the individual course withdrawal policy and other options that might be available as you move forward this semester. Below is some information about available resources that may want to explore between now and the time that we meet.

To schedule an appointment to discuss your progress, you can use the online scheduler at https://shibb.cs.colostate.edu/advisingscheduler.

Best,
Kari

Kari Hansen, M.Ed.
(pronounce: kahr)
COORDINATOR FOR STUDENT SUCCESS
College of Veterinary Medicine and Biomedical Sciences

Strategies for Moving Forward
Link: https://bit.colostate.edu/Training/Uturn/pdfs/strategiesSP20-011020.pdf

U-Turn Academic Event for Students
Link: https://bit.colostate.edu/Training/uturn
Online Academic Workshops will be available during U-Turn, do your self-assessment today: https://secure.studentachievement.colostate.edu/UTurn

After drafting your email, go to the "Mailings" tab. Click "Start Mail Merge," then "E-mail Messages." The screen view will shift.
MERGING - STEP TWO

Click "Select Recipients" and then "Use an Existing List." You will then have a screen open to select your associated Excel File and Sheet. Select & Click "Open".
MERGING - STEP THREE

Highlight a Merge Field, then click "Insert Merge Field" and select the Header of the column you want to insert.
Once your merge fields are showing up as seen to the left, you can Preview your results. This will allow you to confirm the merge data is accurate.
MERGING - STEP FIVE

After confirming the information is accurate, you are ready to merge, click "Finish & Merge" and "Send Email Messages..."

Finally select the field with your emails, type a subject line and send!
In order to include attachments, you can click the link button and select the file you want to attach. The recipient will then be able to open the attachment in a web window.
Microsoft Excel

TRACKING CHECKSHEETS GRADUATION PLANNING
CONDITIONAL FORMATTING

New Formatting Rule

Select a Rule Type:
- Format all cells based on their values
- Format only cells that contain
- Format only top or bottom ranked values
- Format only values that are above or below average
- Format only unique or duplicate values
- Use a formula to determine which cells to format

Edit the Rule Description:
Format all cells based on their values:
Format Style: Color Scale

Minimum
- Value: (Lowest value)
- Color:

Maximum
- Value: (Highest value)
- Color:

Preview: OK Cancel
### DATA TRACKING

<table>
<thead>
<tr>
<th>Student Information</th>
<th>Advising Tracking</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>First</td>
</tr>
<tr>
<td>1111111111</td>
<td>Cam</td>
</tr>
</tbody>
</table>
These have logic where as you add in the credits below they are added up here as well.

These two fields turn GREEN when the condition is met that they reached 120 or 42 credits respectively. (see below)

These can be copied and pasted into the appropriate semester by the student or advisor (super helpful when working with other advisors as well - Pre-Health; Pre-Law; etc.)

<table>
<thead>
<tr>
<th>Course #</th>
<th>Credits</th>
<th>Upper Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>VM83100D</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>118</td>
<td></td>
</tr>
<tr>
<td></td>
<td>41</td>
<td></td>
</tr>
<tr>
<td></td>
<td>120</td>
<td></td>
</tr>
<tr>
<td></td>
<td>41</td>
<td>(upper division 300/400 level courses)</td>
</tr>
</tbody>
</table>
These X's can be changed to Green Checkmarks.

I used conditional formatting for the color to change depending on the letter in the cell and webding font using letter "a" for check and "r" for X.

Logic that changes the marker based on their GPA to more easily identify when they are below or above requirements.
Idea Sharing

TIPS & TRICKS YOU HAVE FOR:
- EFFICIENCY
- SUSTAINABILITY
- INTENTIONALITY