

MYWHARTON

For Advising Support Network

October 18, 2018

Agenda

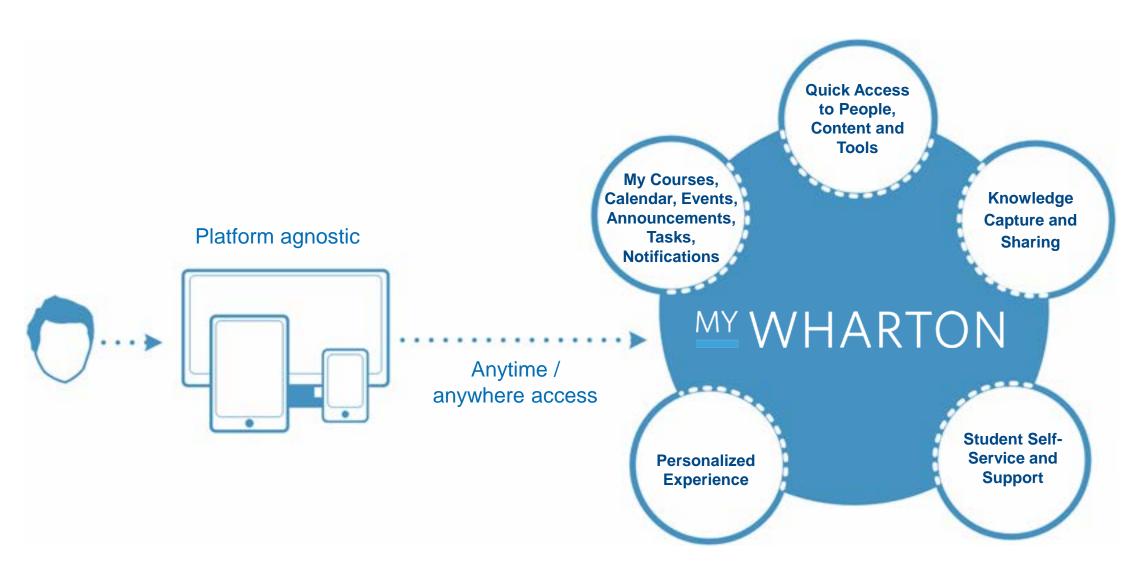
- 1. Current State: Advising for Students
- 2. Forward Looking: Advisor Link
- 3. Current State: Advising for Staff
- 4. Feedback, Support and Questions



Project Goals

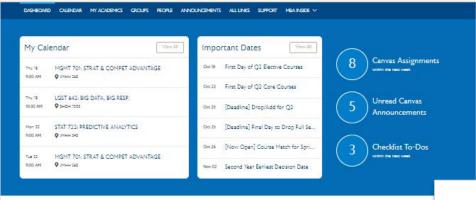
- 1. Deliver a personalized, more streamlined experience throughout the student journey
- 2. Aggregate and highlight key information at a glance
- 3. Enable students to self-serve and access support
- 4. Improve student satisfaction, feedback and insights

Bringing Our Student Experience Vision to Life



Current State: Advising for Students

Dashboard





Natalya Levina

natalya@wharton.upenn.edu

Schedule Appointment

Student Life Advising

Cluster 1: Meghan Gatti, megatti@wharton.upenn.edu

Cluster 2: Kristen Auch, auchk@wharton.upenn.edu

Cluster 3: Larry Rappoport, Irappo@wharton.upenn.edu

Cluster 4: Eddie Banks-Crosson, ebank@wharton.upenn.edu

Career Management Advising

Cluster 1: Todd Carson, tcarson@wharton.upenn.edu

Cluster 2: Manisha Jain, jmanisha@wharton.upenn.edu

Cluster 3: Colleen France, cfrance@wharton.upenn.edu

Cluster 4: Jennifer Savoie, savoiej@wharton.upenn.edu

McNulty Leadership Advising

Cluster 1: Gwendolyn McDay, gmcday@wharton.upenn.edu

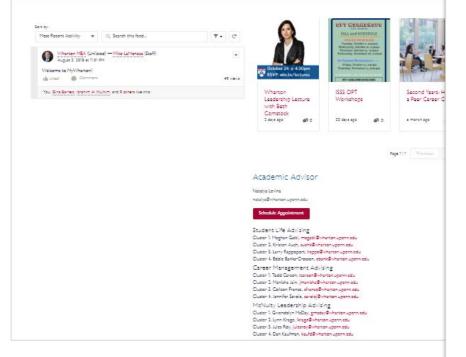
Cluster 2: Lynn Krage, Ikrage@wharton.upenn.edu

Cluster 3: Jules Roy, julesroy@wharton.upenn.edu

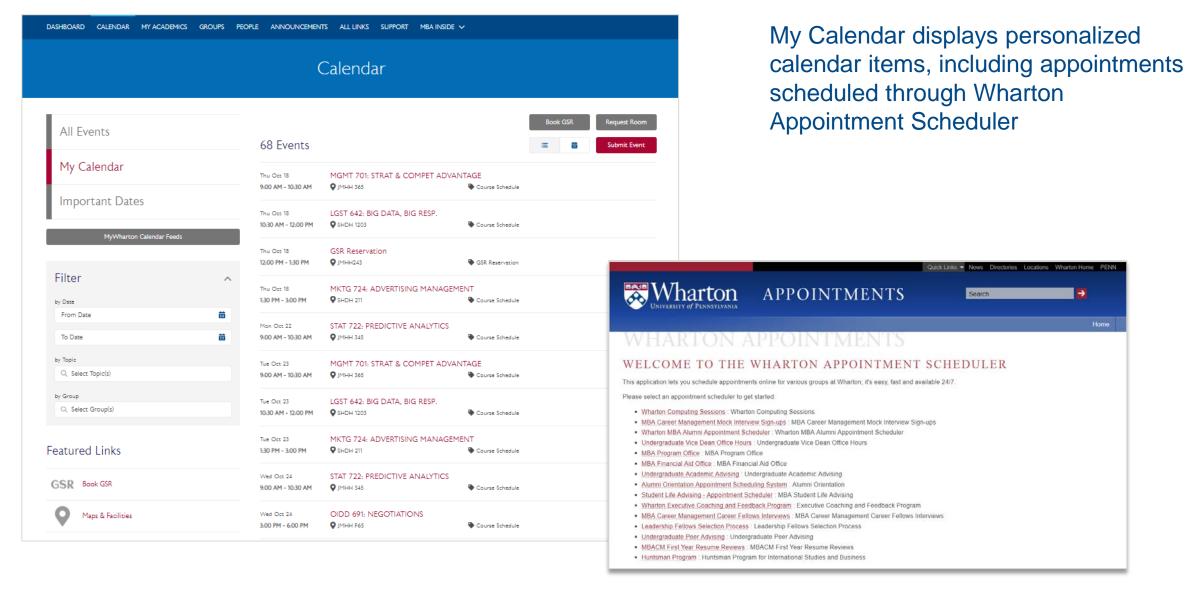
Cluster 4: Dan Kaufman, kaufd@wharton.upenn.edu

Dashboard displays Advisors and contact information

 Academic Advisor is personalized for MVP

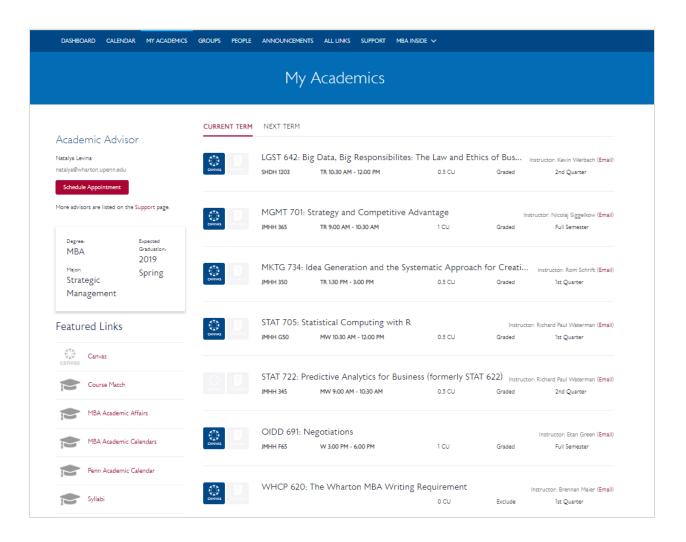


Calendar





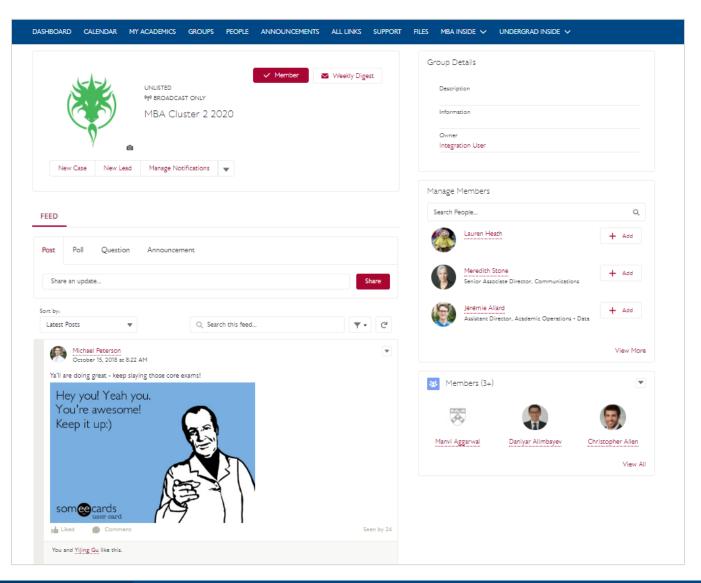
My Academics



My Academics displays personalized Academic Advisor, contact, and link to Appointment Scheduler

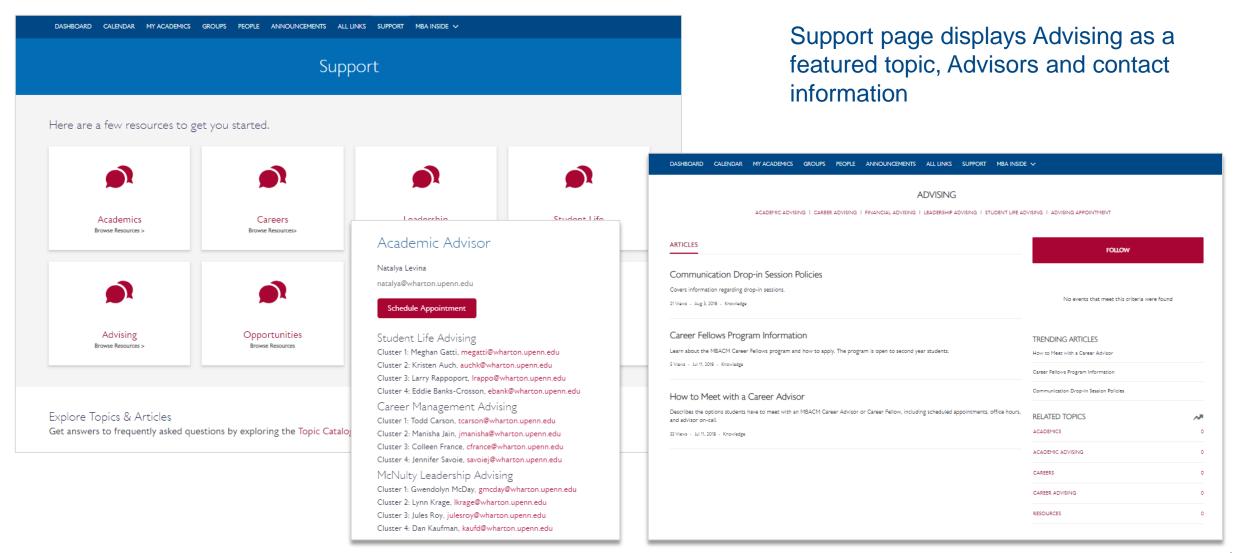


Groups

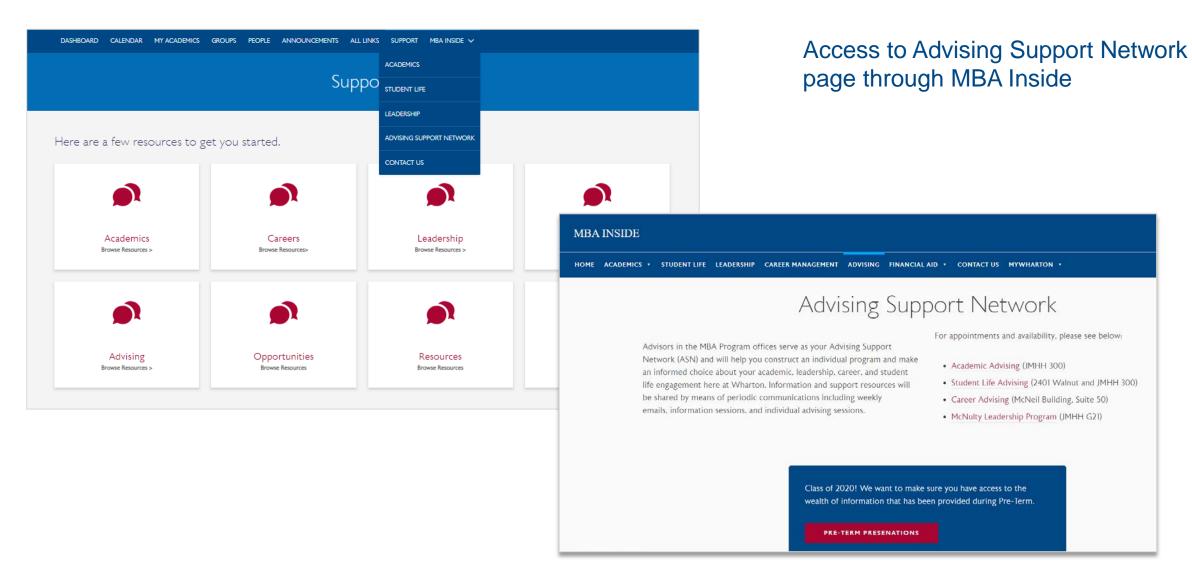


Cluster Groups

Support

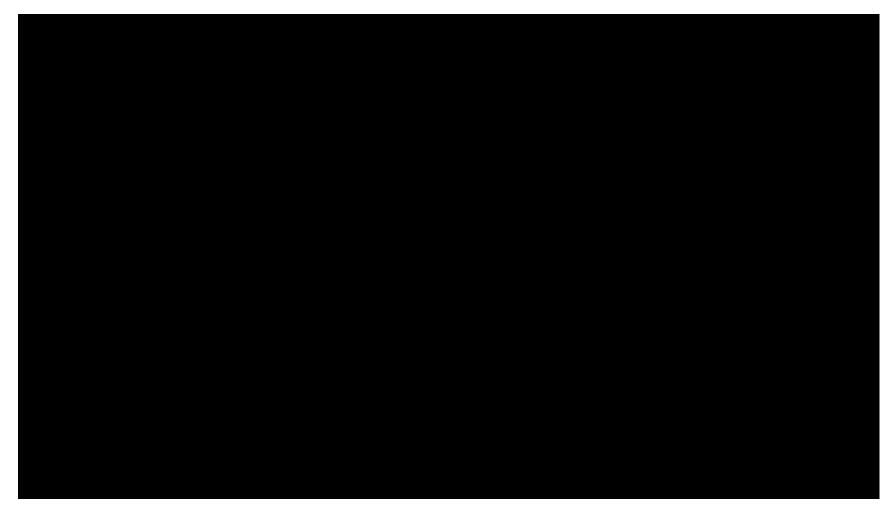


MBA Inside



Forward Looking: Advisor Link

Advisor Link



https://www.youtube.com/watch?v=yuczdCX83qQ&feature=youtu.be



Transform the Student Experience

Advising is at the center of student success. Students want advisors to understand their whole story, from academics to personal challenges to career goals. They need a copilot for their journey.

For students, this helps create a sense of belonging, which is a key driver of student retention.

A Unified Approach for Advisors

Salesforce Advisor Link helps advisors be more efficient and proactive, so students can be more successful. From a single-screen interface, advisors can have richer conversations with students and better understand the issues that matter most.

With real-time insights, collaborative tools, and a platform for engaging students on every channel, your advisors can help students go further.

Download: Salesforce Advisor Link Product Snapshot

Learn more about the Salesforce products or about the Power of Us product donation program for higher education.

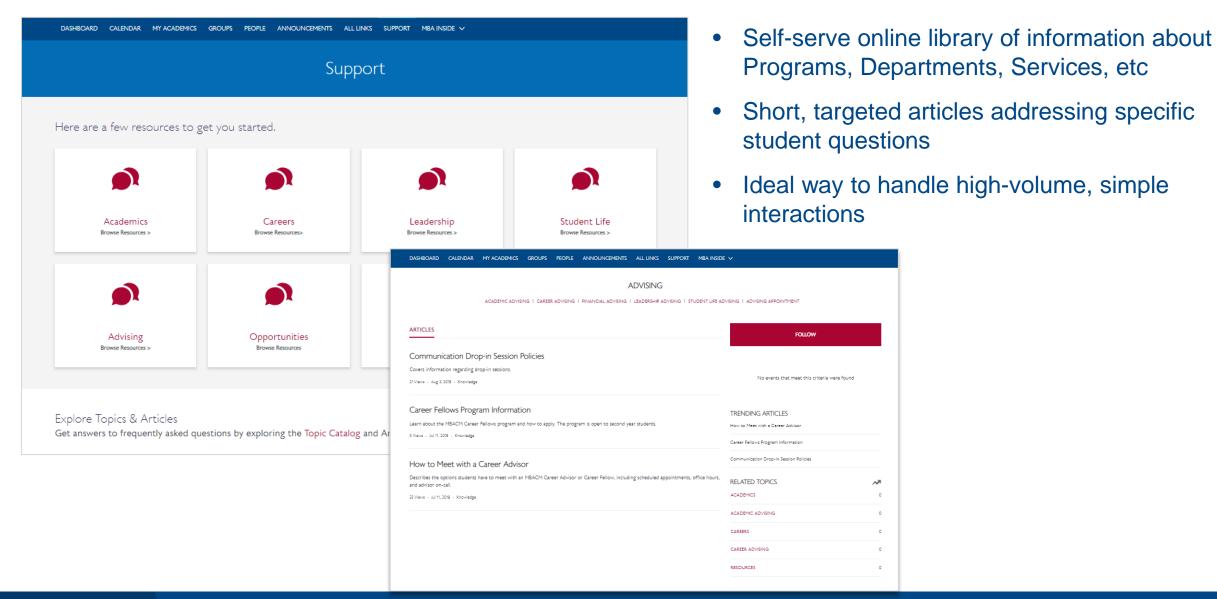


http://www.salesforce.org/highered/salesforce-advisor-link/



Current State: Advising for Staff

Knowledge Articles

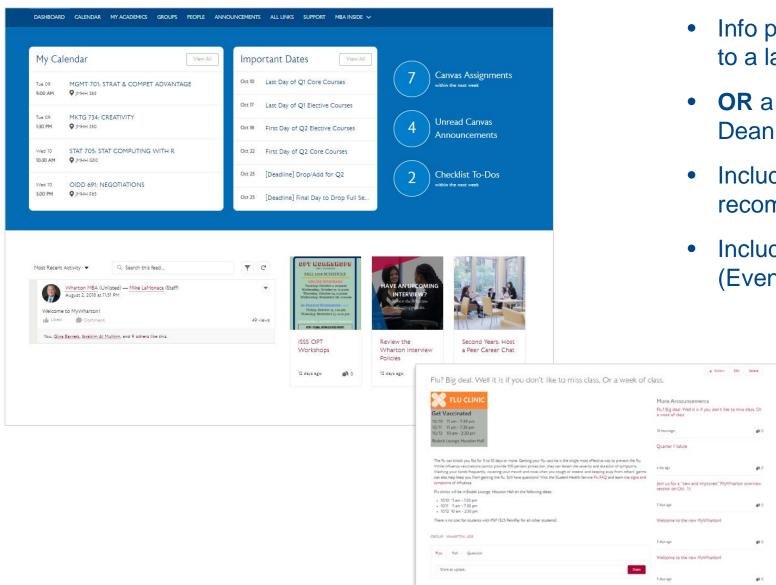


Knowledge Articles: Recommendations

- Push these out by including article links in communications with students
- Keep a running list of frequently asked front desk questions and email inbox questions
- Write the articles from the student perspective
 - How are they asking for the info?
 - How would they search for the info?
 - Consider splitting up long articles
- Monitor the number of views
 - If views are low, review the article for length, title and/or relevancy
- Review stages of academic year and common questions that come up at each stage
 - What additional articles are needed?
 - How can we keep the content timely?
- Think about the information you are sharing with students in conversations/meetings
 - What might be relevant to a broader audience?
 - What might make sense to move to MyWharton?



Dashboard Announcements

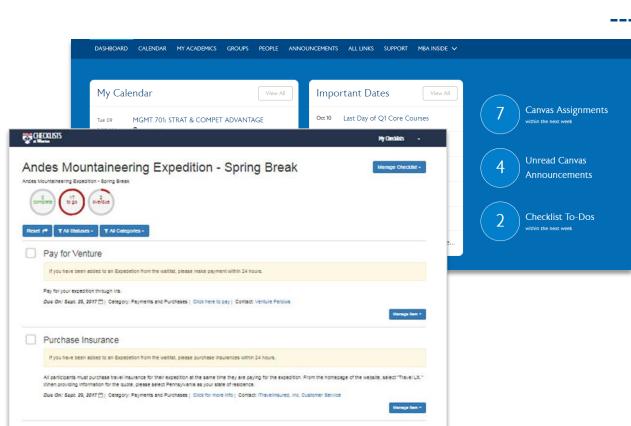


- Info previously sent via MyEmma; applies to a large percentage of the group
- OR a high-profile event, such as with the Dean or speaker
- Include an image (photos are recommended; no attachments)
- Include links to relevant content on the site (Events, Knowledge Articles, etc)

Dashboard Announcements: Recommendations

- Review emails being sent for content; opportunity to re-emphasize emails being sent
- Replicate content posted on Facebook
- Think of it as social media it's about consistency of posting
- Select the most specific group you can
- Set expiration immediately after the event/deadline passes
- Make sure you are an admin of the group so the announcement will also be posted within the group
 and members will receive a notification (based on their settings) otherwise, it will only post to the
 dashboard

Checklists



- Series of action steps required to reach a milestone or complete a task
- Actions/information are in multiple locations
- Actions/information may have a different contact
- Can be assigned to individuals or entire groups
- NOT events, standalone deadlines, or reminders to RSVP



Attend Info Session

Attend Thermoregulation Session

This item will be evaluate on Nov. 10, 2017.

Attend an expedition-specific info Session, Your VF will contact you via email with details.

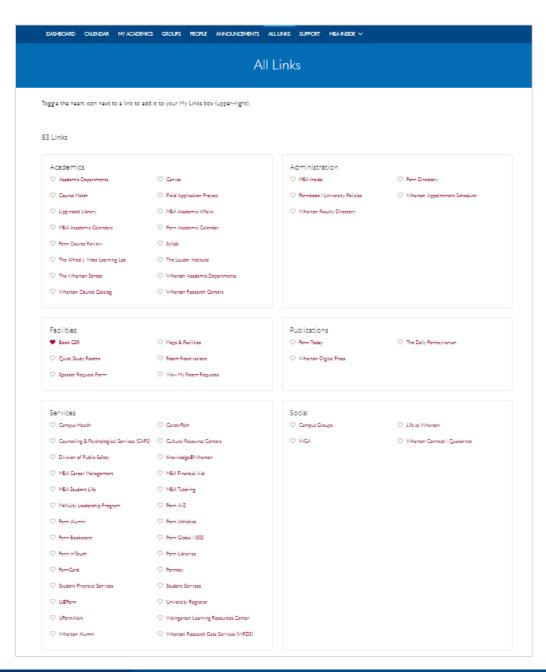
Due On: Oct. 15, 2017 (**) | Category: Info Sessions and Trainings | Contact: Venture Fellows

Due On: Nov. 10, 2017 [Category: Info Sessions and Trainings | Contact: Janese Jackson

This session provides critical information on self-care and how to layer clothing for all expeditions. It's also useful for staying warm through the Philadelphia winter as well

Checklists: Recommendations

- Evaluate emails, newsletters, presentations, handouts, advising follow-up, etc. for potential checklist items
 - Action items in weekly emails/newsletters
 - Regular touch points for advising and recommended student actions
 - Shared activities across departments that could be streamlined
 - Groups of students with specialized requirements (ie International Students, SSF)
 - Programs (GIP, GMC, etc)

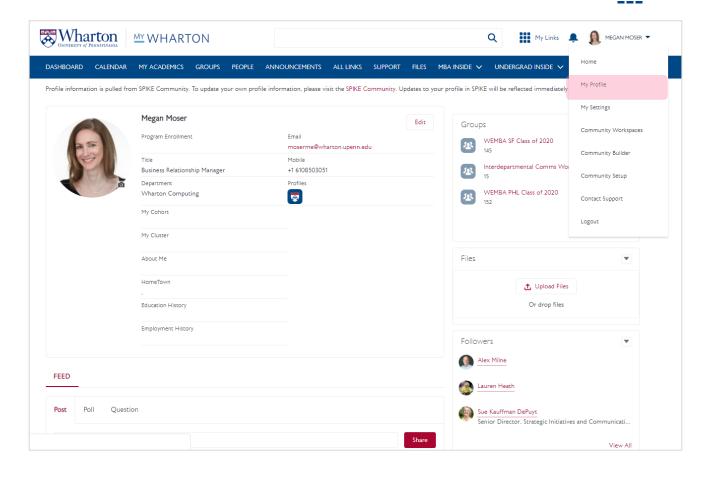




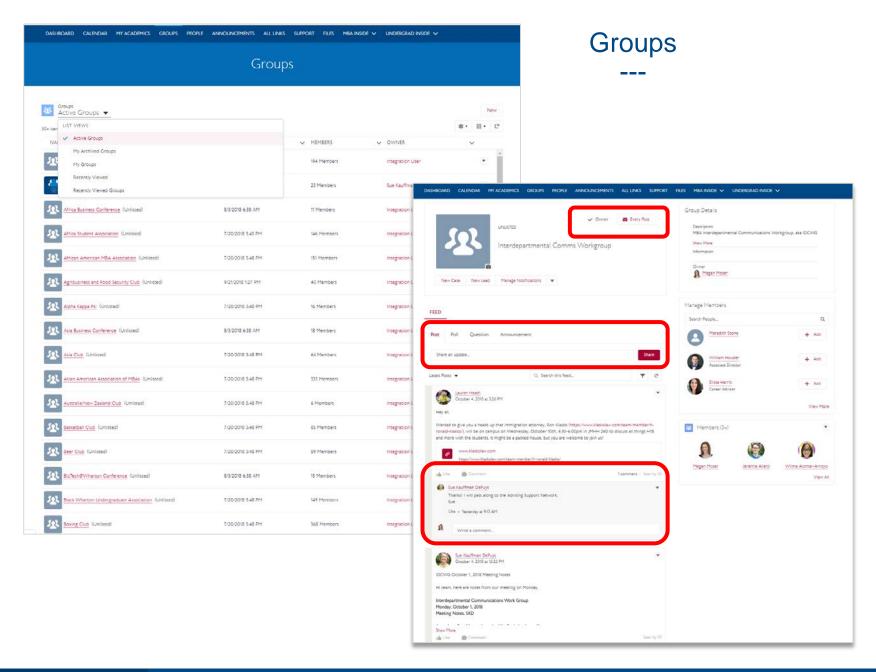
Collection of curated links to resources



Profile

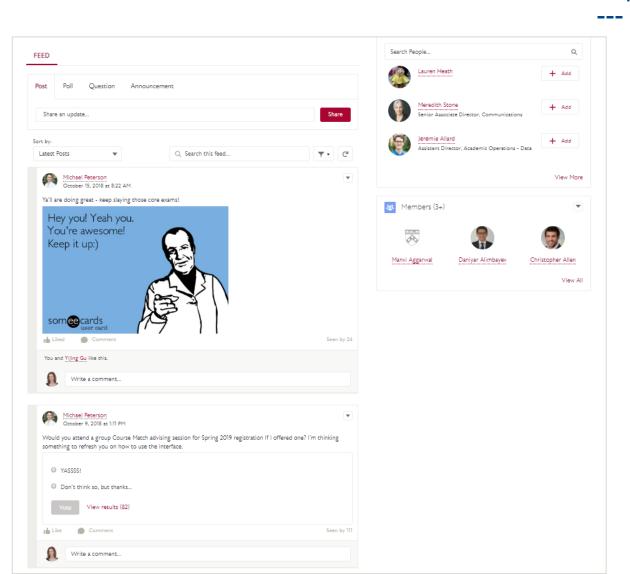


- Upload a profile picture
- Update your Title and Department

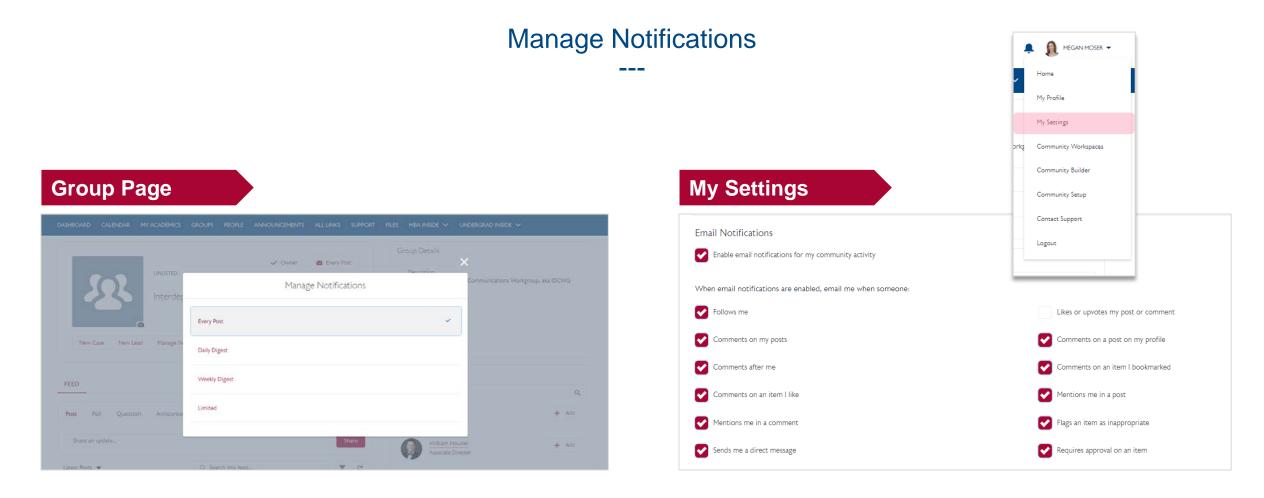


- Leverage the ASN group to share information and experiment with functionality
- Set your notification preferences for the group
- Post, Poll, Question or Announcement
- Like, Comment

Groups



Use Cluster Groups to share information with students



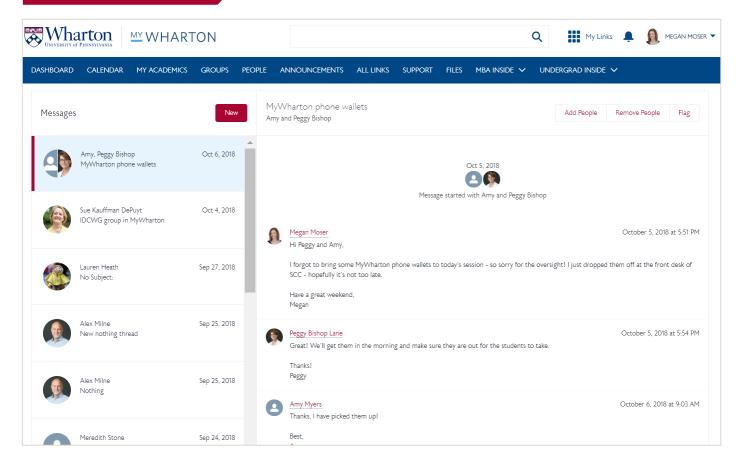
Update your settings for each Group you are in and in My Settings

Notifications



Notifications + Direct Messages

Direct Messages



Feedback





Analytics



Survey Data



Interviews



Focus Groups

Iterative
Development
of Features

Feedback and Support

Technical Support

admin-support@wharton.upenn.edu

Support Resources

<u>support.wharton.upenn.edu</u> (log-in for access to staff-only articles) <u>Salesforce Trailheads</u>

Feedback and Wish List

https://docs.google.com/spreadsheets/d/1ENERygmVVwl1uMTKO0YyKuy4KbE98QhuzN4CrpwoJ9k/edit?usp=sharing

Questions?

