

Advisor Onboarding Curriculum Map

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Glossary

Competency

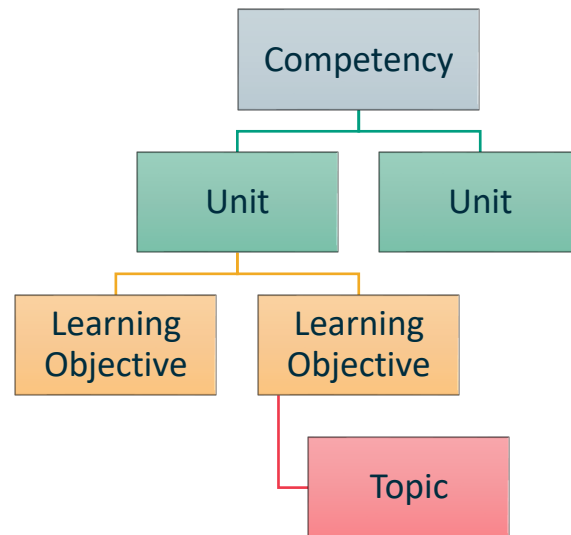
A competency is **what we expect from our advisors**. When an individual holds a competency in some area, they have demonstrated the behaviors required to perform in a particular area successfully.

Unit

Think of units **like chapters in a textbook**. The units in this map include related learning objectives, topics to cover and suggested modality, and assessment and evaluation recommendations. These units are packaged and structured in such a way that aligns with an advisor's workflow.

Learning Objective

Learning objectives define **what knowledge, skills, and abilities new hires will have after completing the unit**. These are more specific than the competencies but not as specific as the topics to cover.



Modality

The modality is **how the information could be shared**. Once a needs analysis is conducted for a particular topic, this recommendation may change.

- Live Session – administrative session with a facilitator
- ILT – instructor-led training
- OLT – online training, could be an iorad, microlearning course, or full Rise course
- Call Calibration – exemplary calls in the Audio Call Library
- Job Aid – document new hires can refer back to as a quick reference
- Workshop – activity-based live session to practice skills
- Review Session – facilitated session reviewing previously learned material

Job Shadow

Previously thought of as y-connects and focused solely on calls, job shadow sessions allow **new hires to connect with a veteran advisor on their team to learn more about all aspects of the job and how their team functions specifically**. Focuses for these sessions relate to the content the new hire will be learning in each unit. The new hire will shadow the veteran advisor on any calls that come in as well as the administrative tasks that advisors work on throughout their day.

Assessment

Assessments are intended to increase quality, while evaluations are meant to judge quality. Because of the nature of onboarding, assessments are used more regularly than evaluations, and these may include knowledge checks, skill demonstrations, role plays, etc.

Competencies

Many of these align with the Annual Performance Evaluation; specific items are listed.

The Advising Role

- The advisor understands the university's mission, purpose, and organizational structure.
- The advisor understands the essential policies and the services offered within the university.
- The advisor is aware of how the role of student success and specifically Advising contributes to the overall student experience.

Operational Skills

- The advisor effectively manages their time to complete their administrative responsibilities throughout the day.
- The advisor effectively manages their time to prioritize and address incoming student needs while completing their required scheduled tasks.
- The advisor navigates and uses internal systems effectively for tasks such as receiving calls, viewing open cases, making outreaches, escalating or closing cases, and maintaining appropriate documentation.

Excellence in Student Advising

- The advisor builds and maintains relationships with their students.
- The advisor communicates and collaborates with their students to ensure success in their academic journey.
- The advisor effectively determines a student's need through preparation and dialogue.
- The advisor identifies and offers appropriate solutions based on student needs.
- The advisor works with escalated students to de-escalate the situation and to help resolve complex issues.

Program Knowledge

- The advisor has essential knowledge of the programs they serve and common career paths for their students.
- The advisor knows how to find information about their programs when they don't know an answer.

Competency-Unit Crosswalk

These charts show what competencies are targeted in each unit.

Unit 1: Understanding Your Role

The Advising Role	X
Operational Skills	X
Excellence in Student Advising	
Program Knowledge	

Unit 3: Engaging with Students

The Advising Role	X
Operational Skills	
Excellence in Student Advising	X
Program Knowledge	X

Unit 2: Preparing for a Call

The Advising Role	
Operational Skills	X
Excellence in Student Advising	X
Program Knowledge	X

Unit 4: Escalating & Following Up

The Advising Role	
Operational Skills	X
Excellence in Student Advising	X
Program Knowledge	

Unit 1: Understanding Your Role

Learning Objectives

- New hires will understand the mission and purpose of the university, as well as the organization's structure.
- New hires will become familiar with necessary policies related to serving students at the university.
- New hires will recognize the importance of student success and how Advising fits into the larger picture of a student's experience.
- New hires will be aware of a typical day in the life of an advisor and have a basic understanding of the expectations associated with the job.
- New hires will be able to identify the purpose of essential systems needed to perform their role and will gain basic navigation skills in each one.

Topics to Cover & Modality Recommendations

Topic	Modality Recommendation
University Overview • Mission & Purpose of the University • What Student Advising & the Advising Team are	ILTs
Compliance Policies • FERPA • Red Flags Rules • Responsible Communication	OLTs
University Services Overview • Disability • Military	OLTs
Understanding the Student Journey • The University • Offices/departments and their purpose • Satisfactory Academic Progress Policy • Financial Aid • Where Advising Team fits in	OLTs with job aid
Role Overview • Advising Team Overview • Daily workflow • Advising Team & student resources ○ Wiki ○ Academic Calendar ○ Student Records System ○ Student Handbook & Catalog • Working with other departments	ILT with a role SME
Technology – access & basic navigation • Office 365 • CRM Platform • Telephone System • SIS • LMS • Student Portal • Academic Guides page	Live Session OLTs with job aids

Assessment Considerations

Since this unit is primarily focused on knowledge acquisition rather than developing skills, I recommend more standard assessments such as knowledge checks embedded into the courses.

Recommendation:

- Knowledge checks within OLTs

Unit 2: Preparing for a Call

Learning Objectives

- New hires will be able to access and prioritize their outreach, tasks, and open cases to plan their day effectively.
- New hires will understand the importance of quality student engagement.
- New hires will be able to identify and effectively use resources available for obtaining information both before making a call and while working with a student to resolve issues.
- New hires will be able to make outreach to students and to receive incoming calls from students.

Topics to Cover & Modality Recommendations

Topic	Modality Recommendation
Planning Your Day • Calendar Management (Best Practice) • Cases & Tasks review and prioritization (CRM Platform)	OLT Review session
Preparing for Calls • Quality Student Engagement (Best Practice) • Preparation skills • Review student's account/case info, Degree Audit Tool, Program Planning Guides • If necessary, review Satisfactory Academic Progress and financial aid	OLT Review session
Reaching Out to Students • Call Mechanics (Telephony System) ○ Make outbound calls ○ Receive inbound calls • Leaving voicemails • Using SMS • Sending emails	OLT with job aid

Job Shadow Focus(es)

- Preparing for the day
- Prioritizing and scheduling appointments and cases
- Preparing for calls
- Tips and tricks to stay organized/finding answers for students
- CALLS – New hires are paying attention to the kinds of calls coaches receive and how they navigate systems while on the call.

Assessment Considerations

Because this unit focuses on tasks and practices, the recommended assessments for this unit are traditional knowledge checks within the courses.

Recommendation:

- Knowledge checks within OLTs

Unit 3: Engaging with Students

Learning Objectives

- New hires will be able to work with students to ensure they continue to make progress in their academic journey.
- New hires will understand the different types of calls they may receive from students and the standard call flow.
- New hires will acquire skills in active listening to understand student concerns and issues.
- New hires will be able to identify concerns and issues raised by students during calls and explain how they will resolve the issue.
- New hires will be able to use internal systems to call students, to log calls and call information, and access information for students.
- New hires will develop skills to work with escalated students.

Topics to Cover & Modality Recommendations

Topic	Modality Recommendation
Call Overview • Call flow ○ Opening ○ Identifying the reason for calling ○ Finding a resolution or identifying next steps ○ Customer Satisfaction Survey (Best Practice)	OLT with job aid
Serving the Students • Active listening • Showing empathy • Asking probing, open-ended questions	OLT with job aid
Types of calls – common reasons students come to advisors • Onboarding Students (Best Practice) • Ongoing Advising • Student Requests	OLT with introductory information
Building Relationships with Students • Presence & Personal Connection (Best Practice) • Celebrating Students (Best Practice)	OLTs with call calibration Workshops with role-play
Standard Advising • Accessing and using advising resources to answer questions • Registration & Degree Audit Tool (Best Practice) • Understanding your program	OLTs with job aids Workshops with role-play
De-escalating Students (Best Practice) • Remaining professional • Validating concerns • What to say vs. what not to say	OLTs with call calibration Workshop with role-play
Completing the Call • Share next steps or when you'll reach out again • Setting Tasks (Best Practice) • Share the Customer Satisfaction Survey • Document the call and close the case (CRM Platform)	OLTs with call calibration and job aid Workshops with role-play

Job Shadow Focus(es)

- Building relationships with students
- Basic advising tasks – registration, accessing advising resources
- Call flow
- Call documentation
- Product-specific information
- CALLS – New hires are listening and watching, seeing how these skills are applied in calls.

Assessment Considerations

The knowledge checks and role-plays recommended in this unit will allow new hires to practice the interpersonal skills. Leveraging Video Submission Tool's video submission capability will allow new hires to get specific feedback on these abilities from their managers and peers.

Recommendation:

- Knowledge checks within OLTs
- Role-plays within workshops
- Video submission to demonstrate effective call flow with presence, active listening, and sharing the Customer Satisfaction Survey
- Video submission to demonstrate de-escalation skills

Unit 4: Escalating & Following Up

Learning Objectives

- New hires will be able to identify issues beyond their control and follow the established escalation path.
- New hires will understand the importance of follow-up with students after issue resolution.
- New hires will be able share relevant information about a student's case with other departments when required.

Topics to Cover & Modality Recommendations

Topic	Modality Recommendation
Solving Problems • Credit transfers • Saving Students (Best Practice) • Course Withdrawal • Program, Specialization, Concentration changes • Grievances, Petitions, Understanding student escalation pathways • Leave of Absence & Returning to the University	ILT with a SME Job aids
Escalating Issues • Options for new hires who don't know the answer/can't solve the issue • Escalation path • Transferring students to other departments (when necessary) • Sharing information across teams/departments	OLT with job aid Review session
Following Up • Setting Tasks (Best Practice) • When/how/why to follow up with a student • In what instance a follow-up should happen • What happens in a follow-up call • How to document follow-up	OLT Review session

Job Shadow Focus(es)

- Escalation examples and what the advisor did in that situation
- Follow-up practices
- CALLS – New hires are given the chance to take calls with the veteran advisor with them to assist.

Assessment Considerations

Because this unit focuses on tasks and practices, the recommended assessments for this unit are traditional knowledge checks within the courses. Video Submission Tool's video submission feature could be used to assess new hire's ability to confidently share next steps/escalation path.

Recommendation:

- Knowledge checks within OLTs