

Student Support Onboarding Curriculum Map

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Glossary

Competency

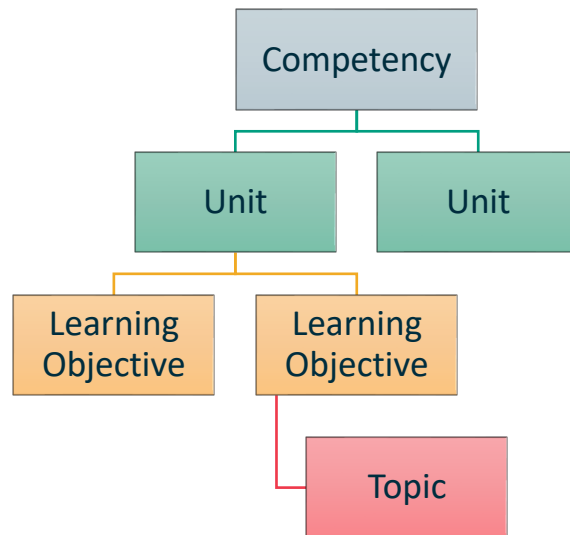
A competency is **what we expect from our agents**. When an individual holds a competency in some area, they have demonstrated the behaviors required to perform in a particular area successfully.

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 agent'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.

- ILT – instructor-led training
- OLT – online training
- 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

Job Shadow

Previously thought of as y-connects and focused solely on calls, job shadow sessions allow **new hires to connect with a veteran agent 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 agent on any calls that come in as well as the administrative tasks that agents 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

The Student Support Role

- The agent understands the university's mission, purpose, and organizational structure.
- The agent is aware of the role of student success and how the Student Support Team contributes to the overall student experience.
- The agent understands their team, its purpose, and how it differs from other teams, as well as how it fits into the larger Student Support Team.

Operational Skills

- The agent effectively manages their time to prioritize and handle multiple tasks during their daily responsibilities.
- The agent is familiar with available resources, including the Knowledge Base and contacts for information they don't have.

Excellence in Student Care

- The agent engages students in meaningful conversations beyond transactional troubleshooting.
- The agent demonstrates effective customer service by actively listening, identifying concerns, and resolving student issues.
- The agent communicates troubleshooting methods to students effectively.
- The agent works with escalated students to deescalate the situation and to help resolve complex issues.

Support Technology

- The agent navigates and uses internal systems effectively for tasks such as receiving calls, viewing open cases, making outreaches, and escalating or closing cases.
- The agent knows how to access student systems, understands their purposes, and possesses basic navigation and troubleshooting skills.

Competency-Unit Crosswalk

These charts show what competencies are targeted in each unit.

Unit 1: Understanding Your Role

The Student Support Role	X
Operational Skills	X
Excellence in Student Care	
Support Technology	

Unit 2: Preparing for a Call

The Student Support Role	
Operational Skills	X
Excellence in Student Care	X
Support Technology	X

Unit 3: Engaging with Students

The Student Support Role	X
Operational Skills	
Excellence in Student Care	X
Support Technology	X

Unit 4: Escalating & Following Up

The Student Support Role	
Operational Skills	X
Excellence in Student Care	X
Support Technology	

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 working at the university.
- New hires will recognize the importance of Student Success and how the Student Support Team fits into the larger picture of a student's experience.
- New hires will be aware of a typical day in the life of a Student Support Agent with 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 Success & the Student Support Team are	ILTs – Day 1 videos, welcome sessions, etc.
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 • Where Student Support Team fits in – finding permanent resolutions for students	OLT with job aid
Role Overview • Student Support Team Overview • Daily workflow • Team resources – Knowledge Base, Student Records System, Academic Calendar • Working with other departments	ILT (role SME)
Technology – access & basic navigation • Office 365 • CRM Platform • Telephone System • Ticketing System • Screen Share Tool • SIS • LMS	Access – live session (ops/role SME) Basic Navigation – OLTs with job aid, specifics to be covered in later units

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 open cases to plan their day effectively.
- New hires will be able to manage incoming calls and chat messages throughout their day.
- 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
Prioritize Cases, Calls, & Chat • Open cases • Inbound calls • Incoming chats	OLT with workshop follow-up (SME)
Prepare for Calls • Review student and case information (CRM Platform), including past cases • Access relevant Team resources • If necessary/possible, research possible solutions to the issue • If possible, prevent future issues by forecasting student's situation	OLT with workshop review (L&D)
Reaching Out to Students (Call Mechanics (Telephony System/GUI)) • Make outbound calls • Receive inbound calls • Access incoming chat	OLT with job aid

Job Shadow Focus(es)

- Preparing for the day
- Prioritizing and scheduling cases, calls, and chat
- Navigating the GUI
- Team-specific tools and information
- Tips and tricks to stay organized/finding answers
- 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 understand the different types of calls they may receive from students and 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 steps they will take to resolve the issue.
- New hires will be able to use internal systems to log calls and call information, share screens with students, and access student systems.
- New hires will be able to effectively communicate troubleshooting methods with students.
- New hires will develop skills to work with escalated students.
- New hires will recognize the importance of understanding the context of a case to find a permanent resolution for the student.

Topics to Cover & Modality Recommendations

Topic	Modality Recommendation
Call Overview • Types of calls • Call flow essentials ○ Connection ○ Compliance ○ Consistency ○ Resolution	OLT with job aid
Serving the Students • Active listening • Showing empathy • Asking relevant probing, open-ended questions • Matching the tone and pace of the call	OLT with call calibration Workshop with role-play
Building Relationships • Personalizing the call • Maintaining ownership/accountability of the situation – looking for permanent resolutions • Celebrating students • Understanding the complete picture	OLT with call calibration Workshop with role-play
Resolving Issues • Using Screen Sharing • Understanding troubleshooting methods • Navigating Team resources • Enabling students through self-service resources • Walking students through what they should do • Walking students through what you're doing	OLT with call calibration, job aid Workshop with role-play
De-escalating Students • Remaining professional • Validating concerns • What to say vs. what not to say	OLT with call calibration Workshop with role-play
Closing the Call • Review your notes with the student • Share next steps with the student • Document and close the case (CRM Platform)	OLT with job aid

Job Shadow Focus(es)

- Customer service skills
- Building relationships with students
- Resolving issues with technology
- Using Screen Sharing
- Call documentation
- Team-specific tools and information
- CALLS – New hires are listening and watching, seeing how these skills are applied in all 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 customer service and personalization techniques
- 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 be able to share follow-up next steps with students, if necessary.
- New hires will understand the importance of follow-up with students after issue resolution.
- New hires will be able to follow the procedures necessary to appropriately close a case after resolving a student's concerns.
- 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
Escalating Issues • Options for new hires who don't know the answer/can't solve the issue • Escalation path • Transferring students using the GUI • Sharing information across teams/departments	OLT with job aid, review session
Following Up • When/how 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 with review session

Job Shadow Focus(es)

- Escalation examples and what the agent did in that situation
- Team-specific tools and information
- CALLS – New hires are given the chance to take calls with the veteran agent 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