



# TIPS AND TRICKS

## INITIAL APPOINTMENTS OVER THE PHONE



### 1) TAKE A DEEP BREATH

Meeting with a student over the phone can be intimidating. Although many social cues are lost over the phone, and sometimes it can take a little longer to cover a concept, you have plenty of tools in your toolbox to optimize outcomes for your student. The first step is to pause and take a deep breath.

### 2) SMILE

The tone of the meeting can impact how the student receives the information. Our cadence and tone are critical even though they can't see your face. When you smile, your tone will be more positive, helping ensure the appointment is a more positive experience.



### 3) ENSURE SAFETY

Before you start, ask your student if they are in a safe and private location. If they are driving, get off the phone as soon as possible. Respectfully let your student know that they need to reschedule for a time when they can be safe and focused on the meeting.

### 4) IF POSSIBLE, ENSURE THE STUDENT IS AT A COMPUTER

When reviewing their program overview, how to find their class schedule, the Transfer Credit Report, or the AAR, it is essential to have your student follow along for better information retention. If they do not have access to a computer, do what you can and then recommend a follow-up in-person appointment once they are on campus.



### 5) OUTLINE THE APPOINTMENT AGENDA

At the beginning of the appointment, clearly state what you will cover during their first appointment and ask them to hold their questions until the end. Often their questions are answered while discussing degree and major requirements and setting up their schedule.

### 6) KNOW YOUR TOOLS AND FOLLOW YOUR STEPS

Phone appointments require more preparation. Familiarizing yourself with Louie, the Academic Catalog, the NAUgo App, and the University Advising YouTube channel makes it A LOT easier to describe how to use those tools. When directing a student step-by-step, you should open the website and follow your breadcrumbs as you go.



### 7) TAKE DETAILED NOTES

Take your time writing detailed notes about what you discussed. Notate your student's key questions and concerns, and utilize hyperlinks that will take your student to helpful web pages and our University Advising YouTube videos.

### 8) IF YOU CAN'T GET THROUGH EVERYTHING THAT'S OK!

Have a list of useful links prepared on your follow-up template. Include links to YouTube tutorials for things you needed more time to cover in your follow-up email. If the student needs to follow up on a concept, direct them to your office hours or other drop-in opportunities. Lastly, feel free to assign homework to your student. They can make the time to practice the strategies you cover during their appointment.

