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## Best Practices of Virtual Advising: The Application of an Online Advising Portal

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## Best Practices of Virtual Advising: The Application of an Online Advising Portal

### Cover Page Footnote

Authors' Contributions Both authors contributed equally to the paper. Both the authors prepared, read and approved the final manuscript.

## **Best Practices of Virtual Advising: The Application of an Online Advising Portal**

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### **Introduction**

Student enrollment in distance education courses and programs has increased substantially in colleges and universities across the United States, during the past years (Lei & Gupta, 2010). However, the year 2020 marked an unprecedented change for higher education institutions, when they had to quickly shift their face-to-face courses to an online setting due to the COVID-19 pandemic. Colleges and universities not only had to adjust to the “new normal” moving their instructional format to an online setting but also, they had to transition their services such as academic advising. Colleges and universities that offer online programs struggle to engage and retain the students. The main purpose of academic advising is to provide the learners with appropriate resources that can help them achieve their professional and career goals. Before the pandemic, many institutions of higher education were already providing virtual advising services to their traditional and non-traditional students. Currently, institutions of higher education are implementing online advising services to engage and retain remote learners. One way to provide effective virtual advising services is by creating a virtual advising portal that integrates the different technology tools. The following article defines the concept of virtual advising, offers several best practices for conducting online advising, and explains the application of an online advising portal that contains some of the most useful technology tools to implement a successful virtual advising model.

### **What is Virtual Advising?**

Virtual advising or e-advising can be defined as a process in which an academic advisor will assist, support, coach, mentor, and empower a student with the use of technology tools. The communications and interactions between the advisor and the learner occur from remote locations (Golubski, 2016). Virtual advising can pose challenges to the academic advisor because it is harder to get to know the students remotely. Nonetheless, it is recommended to follow a systematic approach to advise distance learners so that the roles can be well defined, expectations set-up, and ways of communicating established to maintain consistencies in the virtual advisor-advisee relationship (Simpson, 2018). Virtual advising relies on the use of different technology tools to be able to mentor and coach the students. These tools can be used in an individual or group setting.

The majority of online learners feel isolated and disconnected from their college or university. Moreover, they usually experience high levels of anxiety. The feeling of isolation and anxiety may create a lack of engagement and increase attrition rates in distance education programs. Therefore, the use of e-advising best practices may help reduce attrition rates and increase commitment and meet the needs of distance education learners. Further, online advisors will improve their communications with the learners, by using different online advising tools and resources to support them in their educational journey (Argüello & Méndez, 2019).

### **Virtual Advising Best Practices**

As evidenced by the research, student advising is crucial to graduate student success and is closely tied to student retention, success, and satisfaction. (Schlosser et al., 2003; Chun-Mei et al., 2007). When researching graduate advisee satisfaction, Chun-Mei et al. (2007) discovered that there is a strong correlation between strong satisfaction and specific advisor behaviors. The students expressed their satisfaction when the advisor is “available when I need to talk about my program and progress” and “gives me regular and constructive feedback on my progress toward degree completion” (Chun-Mei et al., p. 268). It is evident that students need, and desire to have, well-timed and accessible support from advisors, this is particularly crucial at present because they feel isolated due to COVID-19 and distance learning. Technology offers the necessary tools to provide widespread online advising improvements, and Polson (2003) encourages advisors to respond to graduate students with empathy, flexibility, and innovation.

To ensure a high degree of satisfaction and engagement with graduate students, it is necessary to apply best practices for optimum success in virtual advising: proactive and frequent contact, encourage goal-setting, offer individual assistance, provide positive encouragement and reinforcement, guide students to additional services provided by the university, interact personally via several individualized methods, such as (a) video conferences, (b) text messages, (c) phone messages, (d) emails, and (e) the use of a virtual advising portal with 24/7 access from admissions to graduation with valuable information. These strategies persuade students to make decisions based on their environment rather than rationally.

Even if an advisor does not hear back from the student, it is important to proactively contact them, at least via text message, as the research has shown that 75% of the students will respond at least once, and even those who do not respond appear to be listening as they will confirm at a later date by expressing gratitude for the helpful reminders (<https://nudge4.org/nudge4-projects/remoteadvising/>). The first step in making a personal connection is by providing the student with a handout with the advisor’s name, photo, and short biography, not only included in the first message but also included in the advising portal. The personal connection, putting a face to a name, humanizes the advisor/advisee connection.

It is important to engage students by sending a message to inquire about how they are doing, and to check if they have any questions or concerns. Messages, whether sent by text, email, phone, or video conference, should be personalized according to the student’s specific interests or circumstances, in addition to reminding about important dates, such as deadlines for registration. Always start and end the communication on a positive, engaging note and offer encouragement or positive reinforcement, or praise for an accomplishment. Always keep the tone of your messages short, conversational, but professional. Do not use abbreviations in text messages, but

it is fine if you use emojis in the chats. Another best practice is for advisors to become a source of assistance and encouragement as students make headway on their path to success—graduation. Goal setting is the first step and essential in completing this objective; therefore, advisors assist students by either helping read the degree audit, find what steps are necessary to accomplish their goal and provide step-by-step support throughout this road to victory. A summary of virtual advising best practices can be found in Table 1.

**Table 1**

*Summary of Best Practices in Virtual Advising*

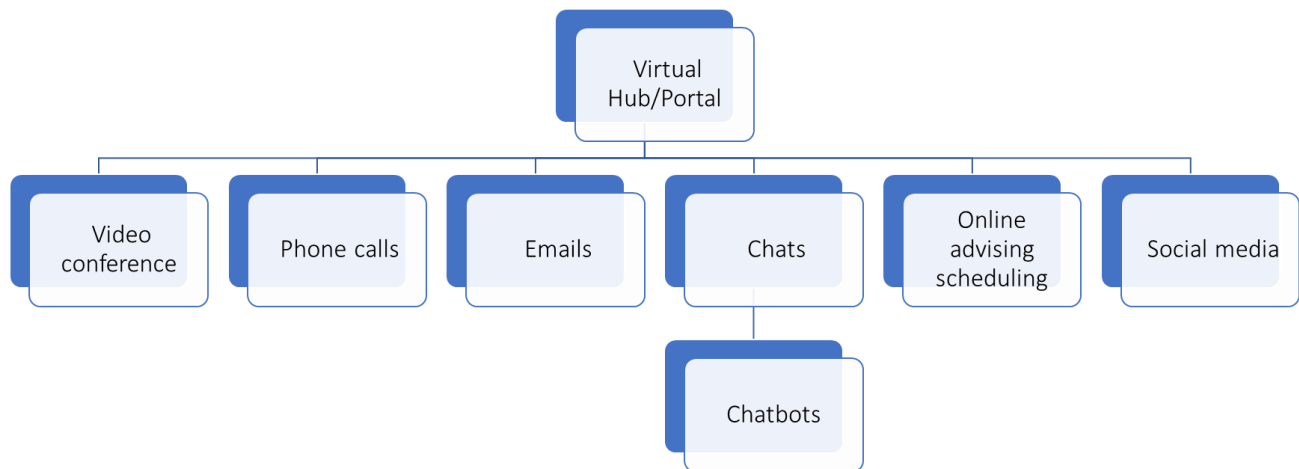
<b>Virtual Advising Best Practices</b>
<ul style="list-style-type: none"> <li>• Well-timed and accessible support</li> <li>• Respond to advisees with empathy, flexibility, and innovation</li> <li>• Proactive and frequent contact between the advisor and advisee</li> <li>• Encouragement of goal setting</li> <li>• Provide individual and group assistance</li> <li>• Offer positive encouragement and reinforcement</li> <li>• Guide students to additional services provided by the university</li> <li>• Interact personally via several collaborative methods and technology tools</li> </ul>

### **Technology Tools used in Virtual Advising**

The effective use and integration of technology tools are vital to online advising (Argüello & Méndez, 2019). Academic advisors can use a variety of technology tools to help conduct synchronous and asynchronous virtual advising sessions (Davison, 2016). Some features of real-time synchronous tools include videoconference, phone, social media, chatbots, and chats. On the other hand, some asynchronous tools include email, blogs, podcasts, videos, online scheduling systems, online degree audit systems, and a virtual advising hub. The benefit of using online collaboration tools is that conversations or chat history can be recorded and tracked. Figure 1 contains some of the most common technology tools used in e advising. We need to keep in mind that technology does not replace the interaction between the student and the advisor; rather, it complements the collaboration and helps increase the student's engagement (Argüello & Méndez, 2019). Also, we need to take into consideration that the technology tools may be challenging to use for the advisors and students and providing training on them may be required (Davison, 2016).

**Figure 1**

*Recommended Technology Tools to be used in Virtual Advising*



### **The Application of a Virtual Advising Portal**

To provide the online learner with a 24/7 service located in one place, we designed an online advising portal or hub, as part of the reconstruction of a master's degree program in Educational Leadership at a higher education institution in South Florida. This portal allows the students to have on-demand access to a variety of synchronous and asynchronous resources. One of the main objectives of the advising hub is to flip the traditional advising model and put more of the responsibility for obtaining basic information on the students. The advising portal may offer a one-stop-shop of relevant information, multimedia sources, links, forms, and other academic advising resources. Further, it will contain some of the most useful technology tools that can help provide synchronous and asynchronous communications with the learners.

Using the same learning management system (LMS) that students use for their online courses, this virtual advising portal is designed, created, and monitored by advisors to keep the information current and to allow students to schedule a conference with their advisors at a mutually suitable time. Students are assigned to the portal upon admissions and continue to have access until graduation. This way, the advisor/advisee relationship is forged at the on-set, and the nurturing engagement with students is developed throughout their college career.

The advising hub can be divided into sections by modules, which provide timely responsiveness and personal connections to promote successful experiences and a thoughtful attitude. As evidenced in the research (Havice et al, 2009; Chun-Mei et al., 2007; Ohrablo, 2016; Waldner, et al., 2011), this is what promotes engagement and retention. The technology tools, previously mentioned are embedded within the platform, starting with a link on the home page for students to request a personalized appointment with their advisor. Some of the links to other university services contained within the modules include: Financial Aid Office, Office of Judicial Affairs, Registrar's Office, Library, Course schedule and syllabi, and the Bookstore, to name a few. Additionally, some modules contain archived podcasts on several advising topics such as time-management, work-life management, and stress reduction. Also, a section on Frequently Asked Questions (FAQs) is included, where students get immediate responses to many common/frequently asked topics. Furthermore, there is a link to a chat where students may get an

immediate connection with their advisor during office hours or join online groups by areas of interest or concentration.

In addition to the different modules, we recommend incorporating the following technology tools in the advising hub to increase the level of collaboration, service, and support. These tools range from software and emails to artificial intelligence. Following, we will explain the different synchronous and asynchronous technology and collaboration tools that we are currently using in the virtual advising portal.

### ***Videoconference Platforms***

Videoconference platforms provide real-time communication and can help the advisor and advisee get to know each other and build a relationship of trust. The use of videoconference presents several benefits to virtual advising. First, the advisor can share with the student documents, university resources, and websites with the screen-sharing capacity. Second, the advising session may be recorded and tracked. This can help the student refer back to the conference. Third, the use of videoconference is the best way to replicate a face-to-face advising meeting and get to know the student. Some of the more common videoconference platforms include Zoom, Go To Meeting, Skype, Microsoft Teams, Google Hangouts, Adobe Connect, Bluejeans, and Dialpad (<https://eab.com/insights/expert-insight/strategy/virtual-meeting-tools-tips-and-alternatives-to-address-covid-19-travel-restrictions/>). The higher education institution might have licenses with some of these platforms and they can be incorporated in the LMS used by the institution.

### ***Email***

Email is the most common way that advisors communicate with advisees. The virtual advising portal contains a section where both parties can send and retrieve email messages. It is important to follow email etiquette guidelines. Further, when advising students via email, the advisor should be as detailed as possible and use a positive tone. The use of emails is also helpful to remind students about upcoming registration periods, reminders, and announcements from the college or university. It is recommended that the response to emails occurs within 24 to 48 business hours.

### ***Chats***

Chats can be helpful for short or quick questions and consultations. Advisors should establish virtual office hours where the student may contact the advisor synchronously using this tool. Be conversational, but professional by spelling out words, like “you” instead of “u”.

### ***Online scheduling systems***

Online scheduling systems provide the ability to schedule a virtual advising appointment with the advisor at a mutually agreeable time. This is possible because the advisee will have access to the advisor’s calendar to determine the availability. There are different online scheduling systems such as Calendly, Doodle, YouCanBook.me, Acuity Scheduling, SimplyBook.me, and Navigate, among others. Some of these scheduling systems are free and others require a license. Also, some can be integrated into the institution's LMS. New college students should request one-hour appointments with their academic advisor, whereas recurring students can schedule half-hour appointments.

### ***Online Degree Audit Tools***

An online degree audit aids the student to keep track of their major, minor, concentrations, and academic progress from admissions to graduation. Also, the degree audit shows the transferred courses and allows the student to do “what if” scenarios. This is a powerful tool for advisors and advisees because it can help with the planning of the courses term-by-term. A link to the degree audit system used by the higher education institution can be incorporated into the advising portal.

### **Conclusions**

The COVID-19 pandemic has exponentially increased the number of online learners in higher education institutions, since most of the brick and mortar students transitioned to virtual classes almost overnight. To address the need of all these brand-new online learners and the existing virtual learners, it became imperative to provide a quality virtual academic advising program. Online advising offers many different benefits to distance learners, and higher education institutions. Academic advisors play an important role in motivating and engaging the online learners, by effectively using the various synchronous and asynchronous technology tools and providing well-timed support, frequent and proactive advisor/advisee contact, and responding to students needs with empathy, encouragement, and praise. Since virtual learners are accustomed to having 24/7 access at their fingertips, an advising portal designed, created, and monitored by advisors provides a direct line of communication between the advisor/advisee. Students have access to this portal from admissions to graduation, and it is easy to use as it resides on the same LMS platform as their online courses. As evidenced, the advisor/advisee relationship is established at the beginning of their program and the nurturing engagement with students is cultivated throughout their college career until completion.



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