Advising team saves 100's of hours every week AND boosts Student Experience with online scheduling

Featuring **Portland State University**

Introduction

How Portland State University led with a **student-first focus** to **save time, improve equity and live their values** with an online scheduling tool.

Portland State University in Portland, Oregon on the US West Coast, **has a reputation as one of America's most innovative and diverse universities**. It serves 26,000 students, and offers more than 200 degree programs. A striking characteristic is its **large number of non-traditional students** - very often adults returning to education after time away - who make up more than 40% of the student population.

pdx.edu

> ## "We're doing more than just saving time. We're creating agency. We're creating equity. We're creating a consistent response across the division. And that's not captured in a number.

Danny Ryel
Portland State University

"PSU started out as a university for veterans returning to the area after World War 2, so it's always been a part of our mission to accommodate non-traditional students", says Danny Ryel, Executive Assistant in the Advising and Career Services Department.

Portland State's advising life cycle begins with prospective students and goes all the way through to post graduation.

"Our division includes Career Services, which is available to students for the rest of their lives. So we see people who graduated 40 years ago come in for advice. They're not current students."

"Many others are full time parents, full time workers, and full time students," Danny continues. "When you're juggling all those things, it might be that 11:30 at night is the only time you have to schedule an appointment."

This diversity of student needs was a particular driver when looking for alternatives to the standard 'phone in for an appointment' type of scheduling.

"To hamstring our student population by only giving them particular hours to get in touch is inequitable, and not kind," Danny says.

Waking up from a nightmare scheduling scenario

On top of a potentially **poor student experience**, a **time consuming and inefficient process** was **hampering the work of the appointment scheduling staff.**

Danny was working in the department in 2015, finding times for students to meet their advisor. "My experience back then was it was all scheduled over the phone. First, I was digging around for the right calendar. Then I had to manually put all of their information in. Then I had to manually import that data into our student information system. **It was a nightmare!**"

The Advising department could see the difficulty with this kind of scheduling, but also that students were getting a different experience depending on their major.

"Prior to 2016, departments, majors and colleges each controlled their own advising. Some majors had two or three advisors working with them and some majors had none."

A complete overhaul of the department centralized all 55 members of the Advising team under one division to guarantee a consistent experience for all.

YouCanBook.me really facilitated the equity for our students.

"So we were already in a very transitional phase, looking for ways to improve the experience and to make a process that was equitable," says Danny. **"When we pivoted to YouCanBook.me in 2016 it was a breath of fresh air to be booking people within minutes."**

Today, bookings come into the department in one of two ways. **Every Advisor has an individual booking page**. They use their YouCanBook.me booking link in their **internal communications and as part of their email signature** so students can book directly with them.

To accommodate those students who don't have access to the website or would prefer to call, there are also team pages. These allow schedulers to **easily access the whole team's availability**. "Our team pages are typically used for first availables, and for our front desk reception to schedule with advisors," says Danny. "Sometimes people don't realise that they need an appointment when they call. The team pages make it easy to make a booking really quickly."

Tangible Efficiency Gains

The **Advising and Career Services Department** sees more than **6,500 students every month** and 99.98% of appointments are scheduled through YouCanBook.me. Danny estimates **they save more than 1,100 hours per month with YouCanBook.me**. Breaking that down, it means an **extra 5 hours per week per team member**.

"That's based on roughly 10 minutes per booking. But having been one of the student employees who worked at the reception desk, took the phone call, tried to find a time that worked for the student . . . I know that it **actually saves more than 10 minutes quite often.**"

And Danny notes that YouCanBook.me offers much more value for the advising team. For example, **easy rescheduling and canceling for the students**, confidence that their **booking page availability is always up to date**, and the ability to **give every student a consistent, excellent experience.** "So really, I wonder if that number isn't a bit small, just from my perspective".

> Between the web hooks, the reminder emails, and our ability to really craft the booking form questions ... it was a sell.

Flexibility & Customization: Features that make an impact

Each of the PSU teams has different needs, but the breadth of YouCanBook.me's features gives Danny confidence it can meet everyone's requirements. What are the features that make YouCanBook.me so valuable for this 55-strong team?

Elizabeth Benner, Society & Identity Advisor
Please select the appointment type to make a booking.

First Year Mandatory Advising
Current Portland State students are required to meet with their academic advisor at least once in your first two terms at PSU.

🕐 45 minutes

30 Minute Appointments
For short-term course planning (2-3 terms) and students who are admitted for the upcoming term, and other questions that will require more than 15 minutes.

🕐 30 minutes

45 Minute Appointments
For mandatory first year advising, current students doing long term course planning (3 or more terms), and current students exploring major, career and graduate school options.

🕐 45 minutes

Appointment types

Advisors at Portland State work with a wide variety of students at different stages of their educational career. **They could be meeting with a first year student about classes for their major, or with graduating students about future career plans.** "Appointment types make a huge difference," says Danny.

The team uses the Appointment Types feature to allow students to select the kind of appointment they're looking for. It's a bonus on all counts: **the Advisor knows what kind of meeting it will be, the student has thought about what they need, and the correct amount of time is allocated for the meeting.**

Reminders and follow up emails

Working with busy students, Portland State staff know things can fall through the cracks. By sending reminder emails, they're able to **prompt students about the appointment in plenty of time**.
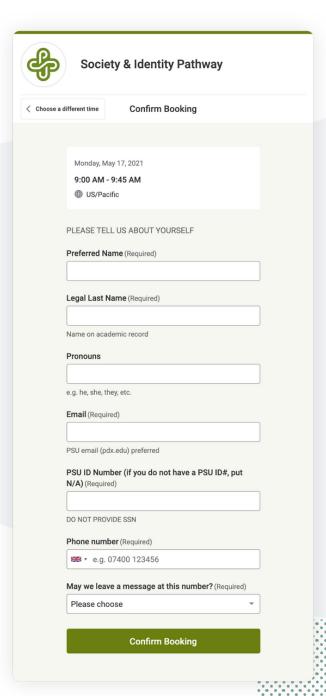
"And follow-up emails are one of the features that we're really grateful for," Danny says.

The teams send one **follow-up email right after the appointment that asks for feedback**. A second, that includes the Advisor's link, goes out **4-5 days later with information about how to get in touch in the future**.

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No-shows dropped after integrating YouCanBook.me.

Booking form customization

With all the different types of appointments, it helps Advisors to have **customized questions on the booking form of each booking page so team members can be fully prepared**. "The types of questions you can ask and the ways that you can ask them - radio buttons or drop downs or short form answers, and having ones that are required. I really love the new feature where you can confirm the email addresses."

Society & Identity Pathway

⟨ Choose a different time   Confirm Booking

Monday, May 17, 2021
9:00 AM - 9:45 AM
🌐 US/Pacific

PLEASE TELL US ABOUT YOURSELF

Preferred Name (Required)

Legal Last Name (Required)

Name on academic record

Pronouns

e.g. he, she, they, etc.

Email (Required)

PSU email (pdx.edu) preferred

PSU ID Number (if you do not have a PSU ID#, put N/A) (Required)

DO NOT PROVIDE SSN

Phone number (Required)

🇬🇧 ▾   e.g. 07400 123456

May we leave a message at this number? (Required)

Please choose   ▾

Confirm Booking

Booking page customization

Danny can add Portland State **branding to all the booking pages and email communications**. "At the University, we're required to have either our PSU logo or Portland State University spelled out on everything that is an external site. So just being able to easily upload that into everything is super, super useful."

Webhooks

Danny uses webhooks to **pass booking data from YouCanBook.me into the other systems** the University uses so all the data is in one place. "If you can use webhooks, then it's a game changer," says Danny. "That was a big part of our decision to use YouCanBook.me."

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People are seeing how useful YouCanBook.me is, how they can integrate it, and they're jumping on.

Portland State University's stated values include promoting access and equity, striving for innovation to solve problems, and treating everyone with integrity and respect. Using YouCanBook.me for their online scheduling aligns completely with those values and, with Danny's help, the **benefits are spreading throughout the university**.

"Any time a person from another division wants to start using the paid version I help with the set-up. That's happened about three or four times this academic year already. People are seeing how useful YouCanBook.me is, how they can integrate it, and they're jumping on."

Danny's tips for how to successfully use YouCanBook.me

"First imagine **the biggest possible win** that you want. Outline the things you want to achieve and then have a conversation with someone from YouCanBook.me because you'll find out that things are available that you might not have noticed. **There are a number of ways to achieve different things** and the **YouCanBook.me Support team is amazing** for that."

"Front-load a lot of marketing to the people you want to make bookings with so they know it's available and how to use it."

"Finally, **use YouCanBook.me to its full extent**. If you're relying on it fully, you'll be able to see and demonstrate how successful it is. YCBM is a great platform, and we're really grateful for it."

YouCanBook.me is an online scheduling tool which eliminates back and forth emails. Connect your calendar and share the times you want with your customers — scheduled meetings then go straight into your calendar.

Check out how YouCanBook.me can help you save time

Start FREE trial