

# iGrad's Best Practices for a Campus-Wide Financial Literacy Initiative

User engagement is paramount for any successful financial literacy initiative. Even the best financial literacy platform available will prove ineffective if students, staff, parents, and alumni are not aware it's available for them.

Through our collaborations with hundreds of schools across the country, we've developed a comprehensive roadmap of best practices for a successful, system-wide financial literacy initiative.

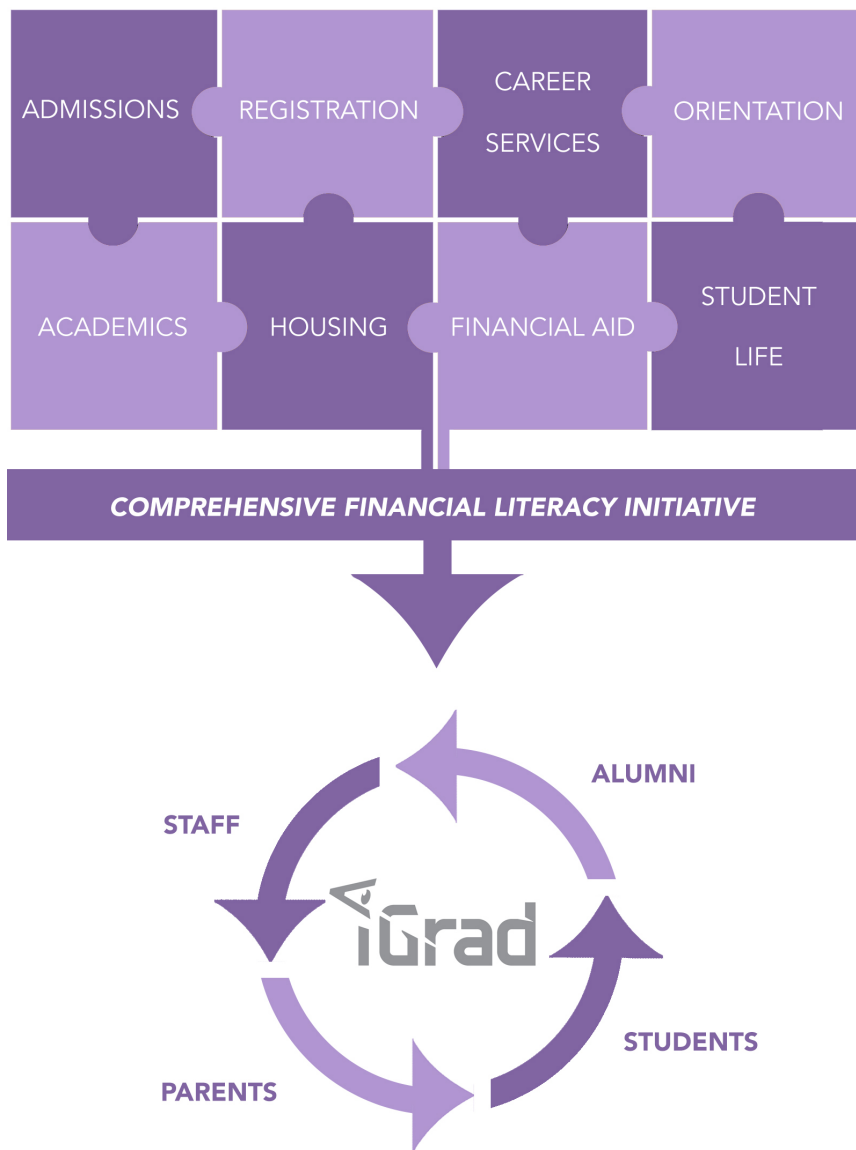
While every school has unique needs and challenges when it comes to their individual financial literacy initiative, these proven strategies will serve as a helpful checklist, as your school works with iGrad to craft a personalized financial literacy plan.

## Phase 1 Roadmap: Conduct A Successful, Highly Visible Launch



### HOST MEDIA DAY & LAUNCH PRESS RELEASE(S)

Bring initial awareness to your financial literacy efforts with a press release campaign through traditional media channels, as well as through your own channels (e.g. school newsletter, alumni communications, school blog). Additionally, inviting the media to an on-campus launch event is a great way to bring attention to your plan for integrating financial literacy across your system.





## CONDUCT LAUNCH EMAIL CAMPAIGNS

Based on the best practices we've identified by launching the iGrad platform at our many partner schools, we're ready to help your school craft a series of highly optimized e-mails for select user groups, bringing awareness to your financial literacy launch efforts. These e-mails can be sent directly by your school or sent by iGrad on your behalf, as per contractual agreement. Distinct launch e-mails should be sent to the following user groups, highlighting the unique benefits for each group: Staff (explaining the benefits for staff and how they can leverage iGrad with the students they work with), Parents (explaining the unique benefits for parents and how they can support and encourage their child's financial literacy engagement), Students and Alumni.



## INTEGRATE iGRAD ADS, GRAPHICS AND LINKS WITHIN YOUR SCHOOL'S WEBSITES

We've designed a suite of banner ads, graphics, and promotional language for easy integration on our partner's websites and student portals. Advertising the financial literacy platform as a key resource within the secure web environments that your school's users are familiar with is an important aspect in bringing people to the tools that iGrad offers. These banners and links can bring users through a Single Sign On process (recommended) or directly to your school's branded iGrad content.



## DISTRIBUTE CAMPUS MARKETING MATERIALS TO CAMPUS-WIDE DEPARTMENTS

iGrad has a suite of ready-made, co-branded promotional materials for use on campus, including brochures, bookmarks, posters, flyers and pens. Additionally, our Content, Media, and IT Departments are available to help your school realize any unique promotional goals you may have. To complement our suite of physical marketing materials, iGrad has multiple promotional videos specifically designed to appeal to college students and motivate them to learn more by visiting the platform. These videos are available for your school to embed on your websites and/or use on campus.

## Phase 2 Roadmap: Empower Your Staff To Leverage iGrad And Promote Usage



## LEVERAGE iGRAD'S SELF-SERVICE STAFF TRAINING AND RUN STAFF CONTESTS

We've seen a great deal of success when schools require their administrators to complete iGrad's financial literacy modules early in the implementation process. Feedback from administrators after taking the financial literacy modules typically exudes a combination of 'feeling more comfortable' with the subject matter, as well as a heightened enthusiasm for promoting the

platform to students. Additionally, running administrator contests where departments compete to see who can drive the most student registrations is a fun and effective way to promote usage.

As a complement to our financial literacy modules, we've developed a 'Staff Training' module, which can be pushed only to staff members, walking them through the various resources offered on the site and how they can leverage and easily share these resources with the student groups they work with.



#### UTILIZE iGRAD'S STAFF RESOURCE GUIDES FOR EACH CAMPUS DEPARTMENT (e.g. FINANCIAL AID, CAREER SERVICES, REGISTRAR)

At iGrad, we realize that different departments will leverage iGrad in different ways. We've developed key resource guides for major school departments, such as financial aid offices, career services, and academic advisors, that can be hosted in the cloud to empower these departments to easily direct the students they work with to relevant resources. For example, our key resource guide for career services staff enables them to quickly direct students to job search and resume optimizer tools on iGrad, while our key resource guide for financial aid officers enables them to direct students to our FAFSA and NSLDS tutorials.



#### LAUNCH ONGOING STAFF 'iGRAD UPDATE' EMAIL CAMPAIGNS

We've found it incredibly effective to routinely update staff members on how iGrad is a key differentiator, the latest iGrad features, and best practices / examples of how other departments are using iGrad across campus. As with any e-mail efforts, iGrad is available to help develop, optimize, and send these e-mails.

## Phase 3 Roadmap: Integrate iGrad Into Existing Campus Initiatives Across Departments



#### IMPLEMENT SINGLE SIGN ON FOR EACH CAMPUS PORTAL

iGrad highly recommends that each of your school's campus portals interface with the iGrad platform via Single Sign On, allowing users to access the iGrad platform and enjoy a personalized experience with just one click. When we release Single Sign On, we often see registrations increase by 10x 'overnight' (after integrating via Single Sign On).



#### INCENT MODULE COMPLETION WITH STUDENT SWEEPSTAKES

We've witnessed firsthand the benefits of utilizing sweepstakes-type incentives; in fact, regular sweepstakes are used by many of our partners, ranging from one \$250 drawing per semester for students who complete multiple modules, to a \$250 tuition reduction for every student who completes our financial literacy modules.

Our custom module deadline system supports sweepstakes, as well as mandatory module requirements. Deadlines can be determined by your school and then assigned to each module automatically based on new student registration. These deadlines drive notifications to the student's profile page and reports are available to school administrators.



### **ADMISSIONS & REGISTRATION:** ADD REQUIRED iGRAD ACTIVITY TO ENROLLMENT PROCESSES

We've had tremendous success with integrating iGrad into the existing enrollment processes at our partner schools. One great way to do this is to identify a single step in the enrollment process (e.g. when a student meets with a financial aid advisor to sign their MPN) during which iGrad can be introduced to the student. During this identified point in the enrollment process, your school can ensure 1-to-1 conversions for all incoming students, by working with iGrad to train financial aid advisors to show the students the iGrad platform, walk them through the registration process, and explain that various modules must be completed according to a pre-determined timeline.



### **ORIENTATION:** INTRODUCE iGRAD TO STUDENTS AT ORIENTATION

Student orientation represents another great opportunity to introduce students to the iGrad platform, by integrating iGrad content into information sessions, workshops, and exercises. One way to do this is by integrating 1-2 financial literacy modules into an orientation course (either credit-based or not).



### **STUDENT LIFE:** HOST A CAMPUS FINANCIAL LITERACY AWARENESS DAY EACH SEMESTER

We recommend hosting a "Financial Literacy Awareness Day" event at each campus, every semester. These events are designed to promote the various campus departments and resources that are available to help students with their money management, student loan, and career needs. For example, each department or service can utilize a booth, which students need to get signatures from after hearing a little bit about the service and benefit.



### **ACADEMICS:** INTEGRATE iGRAD IN THE CLASSROOM

Our articles, videos, and online modules have been integrated into both elective workshops and credit-bearing classroom courses at various schools. One effective way to use the iGrad platform is in a "Flipped Classroom Model," using the online modules as the homework preparation activity, and then reinforcing the knowledge in a classroom through applied knowledge exercises.



### **HOUSING:** INCLUDE iGRAD IN RESIDENT LIFE EVENTS

Another way to introduce iGrad content to students is by incorporating iGrad content into resident life events. For example, an annual resident life event designed to help prepare students who are moving off campus, is easily augmented with an iGrad budgeting exercise and a financial game.



### **CAREER SERVICES:** LEVERAGE iGRAD'S RESOURCES TO COMPLEMENT CAREER DEPARTMENT INITIATIVES

iGrad's suite of career resources, including job search, career profiles, free resume critique, and career articles, videos, and infographics are a great resource for career services departments. Integrating iGrad's tools, such as the free resume critique, into regular career services workshops, allows career counselors more time to work one on one with their students.



### **FINANCIAL AID (AND OTHER DEPARTMENTS):** STREAM iGRAD VIDEO IN STAFF OFFICES AT DIFFERENT CAMPUS LOCALES

Take advantage of our ability to push iGrad videos in real-time to campus staff offices via our streaming Roku Channel. Not only is this a great way to increase the visibility of the iGrad platform, but it can serve as a nice resource for busy departments, such as financial aid officers streaming our Personal Finance Coach videos, which answer the most commonly asked financial aid questions. iGrad promotional videos can be streamed in campus lounges and student centers.

## PHASE 4: Run Ongoing, Targeted Campaigns for Select User Groups



### **LAUNCH CUSTOM EMAIL AND NEWSLETTER CAMPAIGNS**

iGrad will work with your school to develop e-mail campaigns that are effective, personalized, and co-branded, driving student engagement around the unique student learning cycles at each school. In addition, co-branded quarterly newsletters to students, families, and staff, highlight new and key resources on the iGrad platform, driving usage to iGrad.

iGrad can provide your school with a variety of branded templates to promote the iGrad platform with emails containing teasers for specific articles, videos and games; these links can optionally be formatted to direct the student to the Login/Registration page before redirecting to the appropriate page. iGrad is available to develop landing pages with unique information for user groups (e.g. 'Having Trouble Paying Your Loans?' video page) and craft separate email campaigns to drive users to these pages, such as student loan borrowers in repayment, alumni, and more.