

Student Success Advisor Tasks - Checklist

Daily

_____ Arrive at beginning of shift

_____ Turn on/off heat/air conditioning

_____ Make sure lobby is neat and tidy

_____ Check bathrooms for cleanliness (soap filled, paper towels/toilet paper stocked)

_____ Turn on TV's in lobby

_____ Prepare for intros

1. If you didn't prepare the folder/student info form/clipboard/water bottle the day before, do so before the intro is scheduled to come in
2. Double check the Intros For The Day Spreadsheet (Office Specialist updates this daily and there may be last minute changes/notes)

_____ Greet intro

1. Know the name of the parent and the child
2. Tell them where to sit, where the bathrooms/drinking fountains are
3. Tell them which classroom they will be in and their instructor's name
 - a. All of this is located on the Intros For The Day Spreadsheet

_____ Scan Student Info Form(s) into Google Drive

_____ Check email(s) and respond accordingly

_____ Go through your Prospect Pipeline Steps

_____ Go through your Student Pipeline Steps

_____ If it doesn't look like the instructor is going to approach the new intro's parent, walk up to the parent and ask if they have any questions regarding our program before they leave

_____ Do the enrollment conference after the first group class

1. If you are unable to talk to the parent for the enrollment conference after the first group class:
 - a. Send a registration email immediately to the intro (found in Operations Manual - Registration Email Templates)
 - i. Make sure to update this month's leadership principle, program name/level, cost

_____ Answer the phone (take the phone off the charger in the office and keep at your desk). Place back on charger at the end of your shift.

_____ Check to make sure FLUID color sheets are stocked in the office

1. Extras each month can be placed in the file cabinet to use for next year

_____ Enroll students

1. Sign Agreement (initial for auto pay and sign/date 2 locations)
2. Take payment
3. Measure student for leotard
4. Hand them a leotard and dance bag
5. Scan Student Agreement into Google Drive
6. Activate student in Compete
7. Change Studio Director account to 'send emails to family' and check auto pay.

_____ Hang up color sheets as they are turned in

_____ Answer questions from parents

_____ Answer questions from instructors/assistant instructors

_____ If there is a walk in interested in classes:

1. Offer our intro program (2 classes, an instructor evaluation and a water bottle for only \$49.99).
2. Set up first and second intro class (depending on level)
 - a. In Studio Director, set up family account, add student, register into the class you set up for them, add charge for intro program and take payment
 - b. In Compete, set up a new prospect
3. Email the Office Specialist and let them know you set up an intro for a specific date. The Office Specialist will get them scheduled for reminder emails/texts.
4. You may also take down all of their information (email/phone/address, etc.) and let them know our Office Specialist will give them a call tomorrow to schedule their intro program

_____ Log off computer at the end of your shift

_____ On Saturdays, closing up (South). Make sure TV's are off, lights are off (including disco lights/night lights in studio rooms and bathrooms), Purple side at South leave thermostat at 60 degrees and turn on auto. Push on outside studio room doors to make sure latched and check to make sure locked. Teal side thermostat is programmable and can be left alone.

Weekly

_____ DNS Report - contacting all who have missed checking in on them (usually done on Thursdays)

_____ Check inventory and report things needed

1. Leotards (when only 5 left in a size, we need to order more)
2. Dance Bags (when down to 20, we need to order more)
3. Water Bottles (when down to 20, we need to order more)
4. Candy (starbursts and skittles)
5. Stuffed animals
6. Treasure box toys
7. Dance Dollars
8. Free gift supplies (Dance Dollar pouches, chapstick, fanny packs, etc.)
9. Soap
10. Paper Towel
11. Toilet Paper
12. Hand Sanitizer
13. Office supplies (toner, printer paper, intro folders, birthday cards, envelopes, staples, tape, post it notes, etc.)

_____ Attend Weekly Zoom meetings (9am on Wednesdays)

_____ Update hours on Schedule (in Google Drive under your name) if they differ from what was scheduled

_____ Prepare Saturday intro folders/water bottles/clipboards/student info. Forms on Thursday during your shift so they are ready to go on Saturday morning.

Monthly

- _____ Update rosters (make sure completed by the 1st of the month). Print and place in instructor boxes
- _____ Place previous month's rosters in Karen's box
- _____ Print Assistant schedules and place in boxes
- _____ Change out leadership posters (in studio rooms and in lobby)
- _____ Change out leadership flyer (on desk)
- _____ Print FLUID activity sheets for the month and place in box in office
- _____ Check and stock treasure boxes in each classroom if needed
- _____ Take down all color sheets on front windows at the end of each month
- _____ Reach out via email to all students having a birthday 2 months out
- _____ Birthday Cards (done the last week of the month prior to the birthday month). Mail out weekly.

May/November each year

- _____ Fill out evaluation forms for each class with each name
- _____ Highlight which ribbon they are working on
- _____ Group together by class and by day
- _____ Once evaluations are completed, input results into Studio Director
- _____ Attach ribbons if earned
- _____ Place in each instructor's accordion folder (clip each class together)

August/March each year

- _____ Measure all students for recital costumes
- _____ Record measurements in shared spreadsheet

Seasonal/As requests come in

- _____ Work all Open House events
- _____ Work all December & June Dress Rehearsals and Shows/Recitals
- _____ Stuff bags for recital gifts
- _____ Stuff birthday party goody bags
- _____ Work New Season Kick Off week (update shared spreadsheet)
- _____ Put together Kick or Treats and hang flyers
- _____ Silent Auction gift certificate requests
- _____ Work Special Events as needed