



insidetrack[®]

RETENTION TOOLKIT

**5 coaching elements that
leaders and student supporters
can use to improve staff and
student outcomes**





A coaching methodology that supports student retention and staff capacity

At the heart of every college or university is a simple yet powerful goal: changing learners' lives through a degree or credential. But reaching this milestone — of course — starts with persistence. Data from the National Student Clearinghouse Research Center's [2025 Persistence and Retention Report](#) shows that, while average persistence rates have increased, significant disparities remain. For instance:

- Latine and Hispanic, Black, and Native American students persist at rates lower than the national average
- Full-time learners persist and are retained at a higher rate than part-time learners
- Younger students persist at higher rates than older students

These insights show that a one-size-fits-all retention strategy isn't enough. To close the gap, *we must be as resilient as the learners we serve*. At InsideTrack, we've seen how a single coaching conversation, tailored to meet an individual where they are, can change a student's trajectory. This human connection is the key to retention, **but it's only possible when staff have the capacity and support they need to thrive**.

The Five Elements of Coaching — a core foundation of [our coaching methodology](#) — are designed to empower learners to believe in themselves, take action, persist and ultimately complete their education. But they aren't just for student-facing interactions. When leaders use these same techniques with their teams, they create a ripple effect of support that strengthens the entire institution.



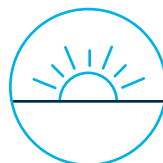
**BUILDING
RELATIONSHIPS**



ASSESSING



ADVANCING



**BUILDING
MOTIVATION**



STRATEGIZING

How leaders and student supporters can use the Five Elements of Coaching

FOR LEADERS AND MANAGERS

Leaders who manage teams can use these elements to build staff capacity and create more efficient teams, allowing for meaningful reflection and growth. By developing staff knowledge, skills and beliefs (KSBs), you'll fuel stronger commitment and better institutional outcomes.

FOR STUDENT SUPPORTERS

Supporters working directly with students can use these elements to build deep relationships and help learners advance toward their goals. This methodology gives supporters the tools to form connections and allows students to develop the self-efficacy they need to persist through graduation and beyond.



BUILDING RELATIONSHIPS

Building an authentic, human-to-human connection is the foundation of trust. In higher education, this trust allows individuals to share their true goals, challenges and lived experiences. When you prioritize these relationships, you help others develop a sense of belonging that can improve outcomes, increase retention, boost positive mental health and more — for both your students and your staff.

Building meaningful relationships takes time, however. Instead of diving right into meeting details, try this:

- **Demonstrate respect** by listening actively and asking genuine, curious questions.
- **Tailor communication** specifically to your student or staff member. They can tell when they're receiving an automated script, so it's important to make them feel seen as an individual rather than an item on your checklist.
- **Share personal information appropriately.** This is important for humanizing yourself and creates a safe space for mutual growth and vulnerability.
- **Summarize and narrate** complicated processes during meetings to ensure everyone is clear on expectations and next steps.

Framing: A technique to build authentic relationships



Being up front about who you are and what your role is allows students and staff to understand how they can work with you and will ultimately empower them to reach out proactively the next time they have a problem. [That's where framing can help.](#)

Framing is the intentional use of phrases to guide a conversation. It sets a clear agenda and establishes your role as a partner in the other person's journey. Whether you're a leader or a student supporter, a good frame saves time and ensures the other person feels heard from the very start.

Two examples of using framing to build stronger relationships

FOR LEADERS AND MANAGERS

Try the collaboration frame: "As your manager, I'm here to collaborate with you on your professional growth and ensure you have the resources you need. What would you like to prioritize in our 1:1 today?"

FOR STUDENT SUPPORTERS

Try the active listening frame: "What I hear you saying is that your work schedule is making it tough to find study time. Tell me more about how that's impacting your week."

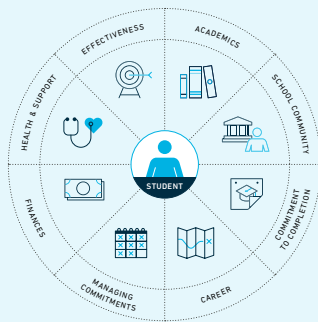


ASSESSING

Holistic support is all about tailoring interventions to each individual by learning more about their specific goals, priorities and lived experiences. This assessment process helps you understand someone’s values, as well as their “why” for being in school or choosing a career at your institution. Tap into this unique motivation to help them keep going through any challenges that come up.

You can deepen your assessment practices by:

- **Approaching each conversation with a curious mindset** and asking questions to develop a clear picture of your student’s or staff member’s definition of success
- **Using open-ended and closed questions intentionally** based on the specific information you’re seeking
- **Listening actively** and asking follow-up questions to show them their voice is valued
- **Listening for gap words** like “should” or “supposed to” that highlight a disconnect between where they are and where they want to be
- **Digging deeper** to uncover someone’s most powerful level of motivation to help them stay on track toward their goals



The Focus Wheel: A technique to assess holistically

The Focus Wheel is a tool used to assess eight key areas of a person’s life: academics, school community, commitment to completion, career, managing commitments, finances, effectiveness, and health and support. Using this tool helps you see the full context of an individual’s life, ensuring you go beyond surface-level issues to understand the root causes of stress or performance gaps — because, many times, assessment doesn’t go deep enough.

Using the Focus Wheel to support students and staff

FOR LEADERS AND MANAGERS

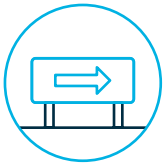
Use the Focus Wheel categories to identify staff pain points. For example: “With the new initiative launching, how are you feeling about your ability to **manage current commitments** alongside these new tasks?”

Or: “Reflecting on your current project list, what’s one way I can help you streamline your process to make your day-to-day more **effective**?”

FOR STUDENT SUPPORTERS

Use the Focus Wheel to look beyond grades and understand a student’s personal context. For example: “Beyond your classes, do you feel like you’ve found a **group of people you connect with** on campus?”

Or: “Outside of our conversations, what does your **personal support system** look like right now, and who can you turn to when things feel overwhelming?”



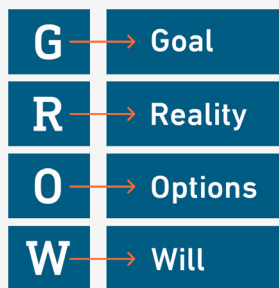
ADVANCING

Advancing is a critical phase you can use to help others move along their professional or educational journey. However, it's also where many people can get stuck. That's why it can be meaningful to take the time to build a relationship and assess thoroughly before jumping straight to this stage.

Helping someone identify clear next steps does more than just move them toward their goal. It helps them build confidence and reduce stress associated with perceived barriers. Through advancing, you're not just giving others the answers they seek — instead, you're helping them build the problem-solving skills they need to identify goals, navigate resources and follow through on a concrete plan.

You can help someone advance in their educational or professional career by:

- **Working together** to identify clear and achievable outcomes for their goals
- Determining if they need **direct recommendations or a brainstorming partner**; both approaches are appropriate depending on the scenario
- Ending every meeting with **specific next steps and a clear timeline** to take action



The GROW model: A helpful technique for advancement

InsideTrack uses the [GROW model](#) — Goal, Reality, Options and Will — to break down large objectives into manageable steps. This framework promotes self-awareness and keeps the other person in the “driver’s seat,” empowering them to uncover their own solutions rather than relying on your expertise.

Leveraging GROW to guide your next conversation

FOR LEADERS AND MANAGERS

G – Grow: “What would success look like for you in your role this quarter?”

R – Reality: “What has worked well for you so far in helping your students thrive, and what’s the biggest challenge you’re currently facing?”

O – Options: “Come up with five potential solutions to this barrier in the next two minutes. Write down anything that comes to mind, big or small.”

W – Will: “What is the very next thing you will do to put this plan in motion within the next 24 hours?”

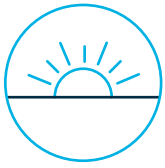
FOR STUDENT SUPPORTERS

G – Grow: “What do you want to accomplish today, and how will you know when you’ve successfully achieved it?”

R – Reality: “On a scale of 1 to 10, how confident do you feel in your preparedness for accomplishing this task? What has worked well for you so far in preparing?”

O – Options: “Let’s come up with eight options in two minutes. Write down anything that comes to mind, big or small.”

W – Will: “Of these options, which one are you willing to try? What is the very next thing you need to do to put this option in motion?”



BUILDING MOTIVATION

What our students and staff do every day is hard work. That’s why keeping up their motivation is critical to helping them achieve their professional and educational goals. When you’re building motivation, you’re reminding them why they’re working so hard and connecting their immediate actions to their long-term vision.

You can help others build motivation by:

- Helping them **define a clear vision** for their future. By painting a picture of what success may look like, you help individuals see past today’s hurdles and stay anchored to their ultimate “why.”
- **Connecting immediate actions** to short- and long-term educational goals or career targets. When a person sees how a small task — like finishing a single assignment or organizing a spreadsheet — is a direct stepping stone to their career or credential, the work feels purposeful rather than just busy.
- Recognizing and **celebrating progress, no matter how small the win**. Acknowledging growth builds self-efficacy and creates the positive momentum needed to tackle larger, more daunting challenges down the road.
- **Normalizing** any challenges they may face. Reassuring a student or staff member that setbacks are a natural part of the journey reduces the shame or frustration that often leads to stopping out or changing careers.

Core values: A technique for building motivation

You can use the above assessment tips to tap into the deeper motivators that connect to someone’s **core values** — principles or beliefs they view as being of central importance in their life — and drive their decision-making. These values are often shaped by social norms, cultural backgrounds and unique lived experiences.

When someone feels stuck, helping them come back to their core values allows them to reconnect with their purpose and find the energy to continue. While “why” questions can sometimes make people feel defensive, you can uncover these motivators by asking “what” or “how” instead.

Try these kinds of questions to help build motivation

FOR LEADERS AND MANAGERS

Ask: “When you look back on this week, what was a moment where you felt you truly made an impact?” This helps staff identify their own wins, building the self-efficacy needed to stay engaged.

Ask: “What’s one part of your role that you’d like to lean into more?” This connects immediate professional tasks to your staff member’s long-term vision of who they want to be in this role.

FOR STUDENT SUPPORTERS

Ask: “If you could fast-forward to graduation day, who is the first person you’d want to share that moment with, and why?” Connecting a goal to a personal relationship taps into deep, value-based motivation.

Ask: “How would it feel to move this off your plate so you can be more focused as we move into this next semester?” This helps normalize a challenge while refocusing the learner on their academic “why.”



STRATEGIZING

Strategizing is the behind-the-scenes preparation that makes your time together more efficient and impactful. It's the "pause" that allows you to be truly present when a meeting begins. By taking a proactive approach, you show others that you truly care about their success.

You can actively strategize by:

- **Prioritizing the people you know need extra assistance right now.** Making sure they feel seen and heard can increase retention because they know there is someone who cares about them.
- **Experimenting with different communication methods.** For example, an adult learner might prefer a quick text during their lunch break, while your student support staff may want to meet face-to-face to discuss a learner they're having trouble connecting with.
- **Reviewing past notes** to determine an initial area for assessment, while leaving enough room for curiosity so the other person can still drive the conversation.
- **Anticipating potential roadblocks before they arise.** Think through the what-ifs — like a financial aid challenge or a software rollout — so you can offer a calm, steady hand when the individual you're supporting feels overwhelmed.

Self-assessment: A technique for strategizing

Before joining a meeting or sending an email, take a moment to center yourself. This self-assessment ensures you're approaching the interaction with the right focus and energy. It allows you to review past notes, listen for gap words like "should" or "supposed to," and enter the conversation with clear intention.

Examples of self-assessment for leaders and student supporters

FOR LEADERS AND MANAGERS

Before a 1:1, ask yourself the following questions:

"What is my intention for this check-in? How can I assess my staff member's intention?"

"Am I prepared to hear about challenges with team capacity or work-life balance? If not, how can I get there?"

"What possible goals would I like my staff member to set in this meeting?"

FOR STUDENT SUPPORTERS

Before reaching out to a student, ask yourself the following questions:

"Based on our last conversation, what do I anticipate this student will bring up today and how can I help address it?"

"Is there anything I think this student is actively avoiding discussing? If so, why?"

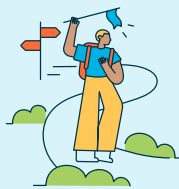
"If I hear my student say 'should' or 'would,' how can I gently push them to explore this gap further?"



The Five Elements in action

When leaders use these five elements with their staff, they create a culture of capacity, reflection and mutual respect. When supporters use them with students, they empower learners to persist toward their goals. Together, these tools build the resilience needed to improve retention outcomes across the entire institution.

TWO PATHWAYS TO SUPPORT — AND RETAIN — YOUR STUDENTS AND STAFF:



RETENTION COACHING

Our expert coaches work to provide personalized, human-powered support that helps learners stay on track and reach the finish line.

[EXPLORE COACHING PROGRAMS >](#)



COACHING DEVELOPMENT AND TRAINING

Build lasting in-house capacity by equipping your student support teams with our research-backed certifications and training programs.

[EXPLORE TRAINING PROGRAMS >](#)