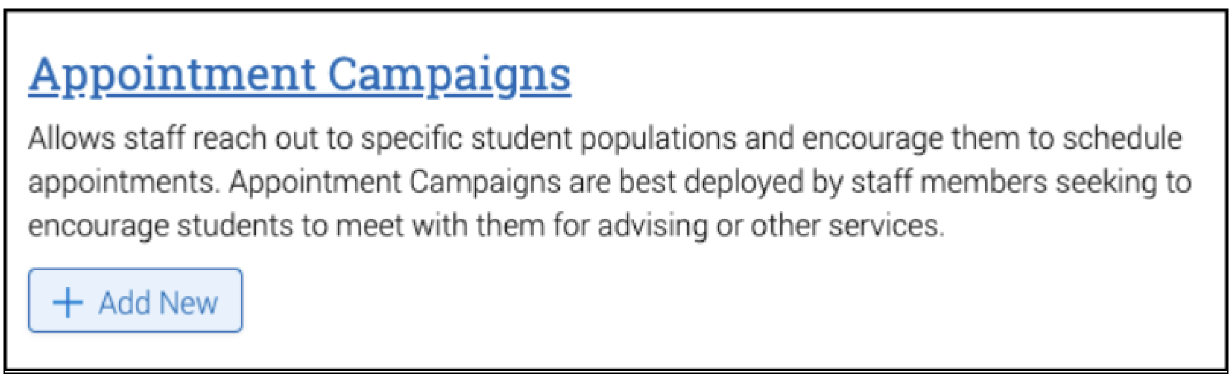
Appointment Campaigns and Navigate

Appointment Campaigns are a critical part of Navigate workflow. Strategic questions should be asked when creating appointment campaigns, such as:

- How would you like to impact your students with campaigns? What student populations do you envision this would be used for?
- Who should be launching campaigns? Should campaigns be part of each staff member's personal workflow? Or should they be more centralized and launched by unit leaders?
- What guidance do you plan to give to your staff as far as follow-up? If a student does not respond, when is an appropriate time to resend invitation, send email, or text?

Launching an Appointment Campaign

To begin, open the **Campaigns** page and select **Add New** from the Appointment Campaigns section.

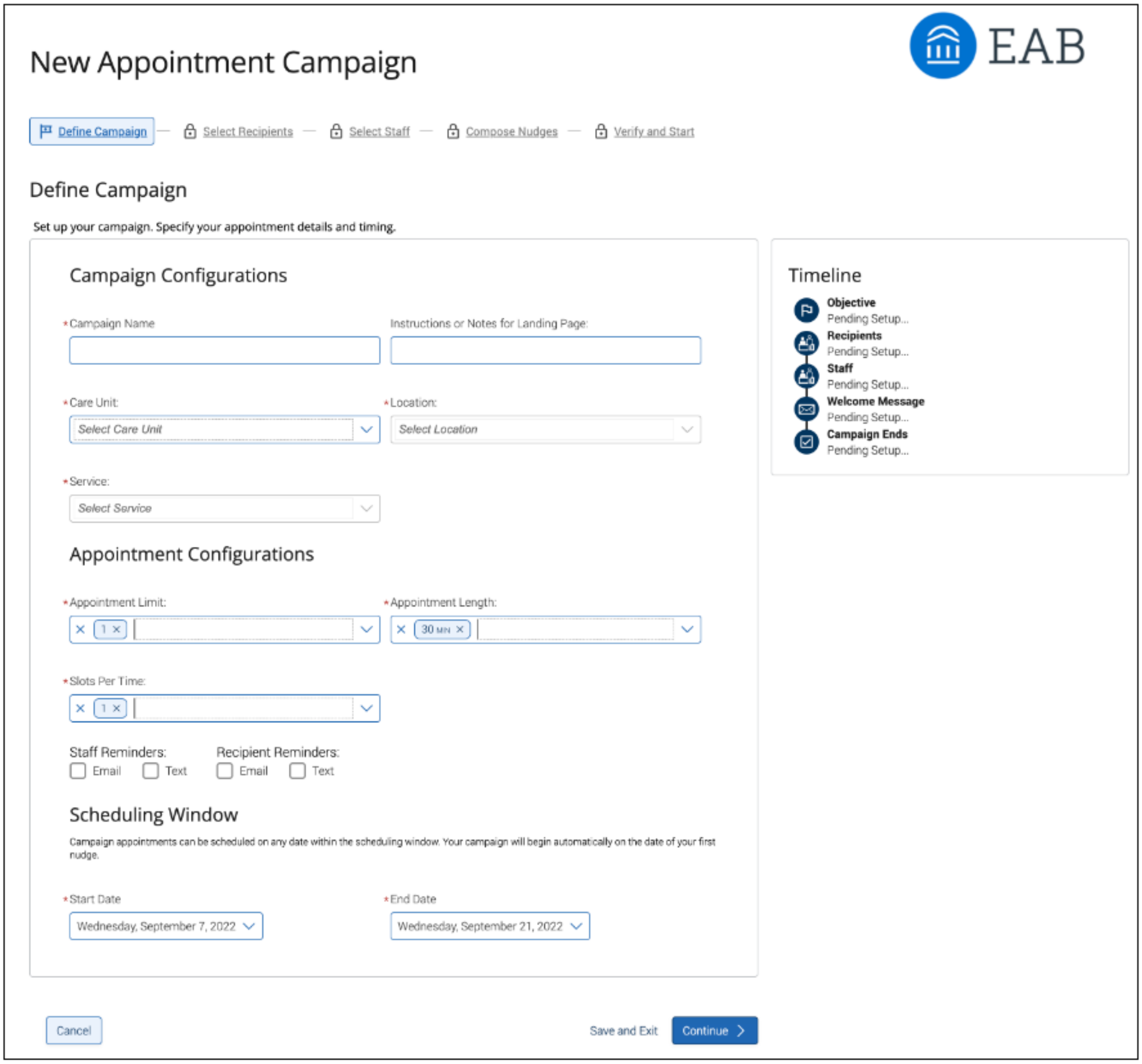


Define the Campaign

The **New Invitation Campaign** page opens. Now you set the criteria for the Appointment Campaign. The fields that must be filled out are listed and defined below.

> **Note.** If other staff are going to be included on this campaign, the reason/location/date range **must** align with Campaign Availability for the advisors that are going to be included in the campaign if you want them to be available.

Campaign Name



Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

> **Note.** Start campaign names with the most important info. Academic term is the most important!. Some formats could include: Term, Population, Purpose; Term, Population, College, Purpose; Term, College, Purpose, Last name of user who created the campaign. Examples include: "F19 Freshmen Reg Campaign", "F20 1st Time Freshmen Business 15-to-finish", or "S21 Freshmen Bio Major Decl, J. Smith"

Instructions of Notes for Landing Page

This field shows instructions for the campaign the student sees when they open the Appointment Campaign notification. Make this text short and descriptive.

Care Unit

The Care Unit the Appointment Campaign is associated with.

Location

The location where the appointments will be held.

Service

The Student Service associated with the campaign.

Course or Reason

The reason or associated course for the campaign here. This only appears if the Service is tied to a course.

Appointment Limit

How many appointments you want students to schedule during the campaign.

Appointment Length

How long the campaign appointment will be. Durations begin at a 5 minute length.

Slots per Time

Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment. The maximum number of slots is 500.

Allow Scheduling Over Courses

If checked, this box lets students schedule over course conflicts. *Course conflicts* refers to time slots where either the potential organizer or the student have conflicts due to either instructions or enrollments.

Staff Reminders

These checkboxes select what kinds of Appointment Campaign notifications the staff attached to the campaign will receive. The two options are Email and Text.

Recipient Reminders

These checkboxes select what kinds of Appointment Campaign notifications the campaign recipients (usually students) will receive. The two options are Email and Text.

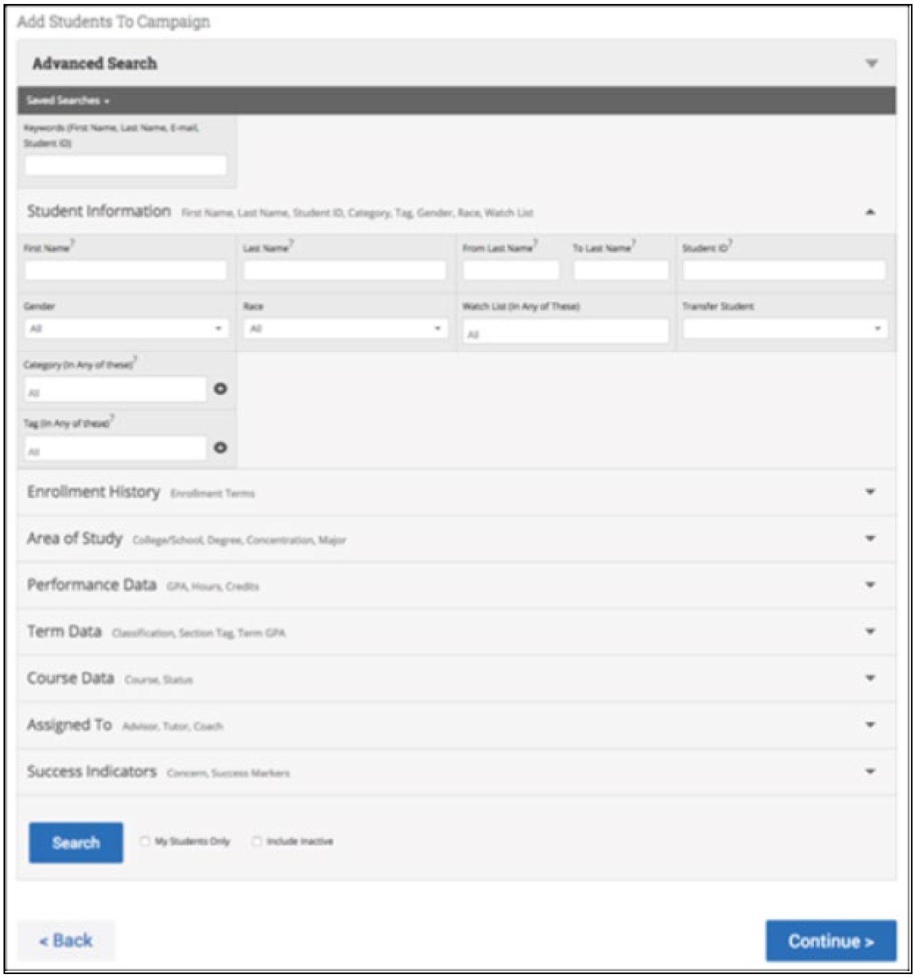
Start and End Date

The date range that you want students make campaign appointments for.

Add Students to Campaign

After entering the details on the Define Campaign page, click **Continue**.

Your next step is adding students. If you created this campaign directly from a Student List (recommended) or Saved Search, you are asked to review your students. If not, an Advanced Search opens. If you have a Student List (recommended) you want to use, you can select it using Advances Search too.

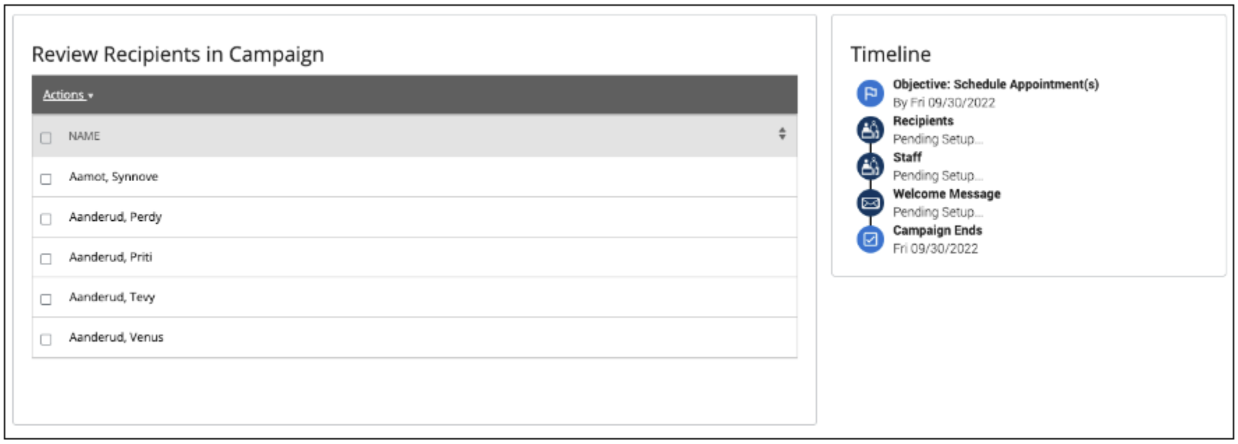


You have several ways to search for and select your students. You can add all students assigned to you to a campaign using the *Invite All My Assigned Students* option. The other option is an Advanced Search. Use Advanced Search filters to find and select students.

After starting the search, you are presented with a list of students. Select the students you wish to add and then choose **Add Selected Users and Search for More** from the actions menu.

You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed.

Once finished, click **Continue** to move to the next page. You are asked to review the students in the campaign. If these are correct, click **Continue**.

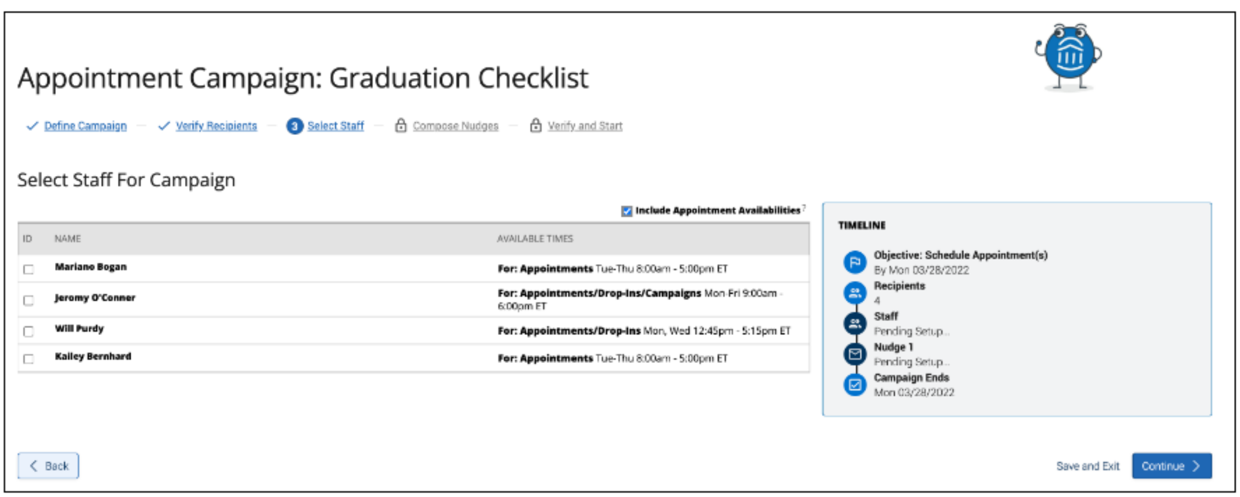


Add Staff to Campaign

Next, you need to choose Organizers for the campaign. You must select yourself. You can also select additional staff to make them available for appointments based on your role permissions.

Important. Staff must have availability defined before they can be added to an Appointment Campaign. If you do not see staff you expected to have availability, make sure their calendars and availability are up-to-date.

If your school does not use Campaign Availabilities, select the **Include Appointment Availabilities** options to show available advisors.



Add staff to the campaign and click **Continue**.

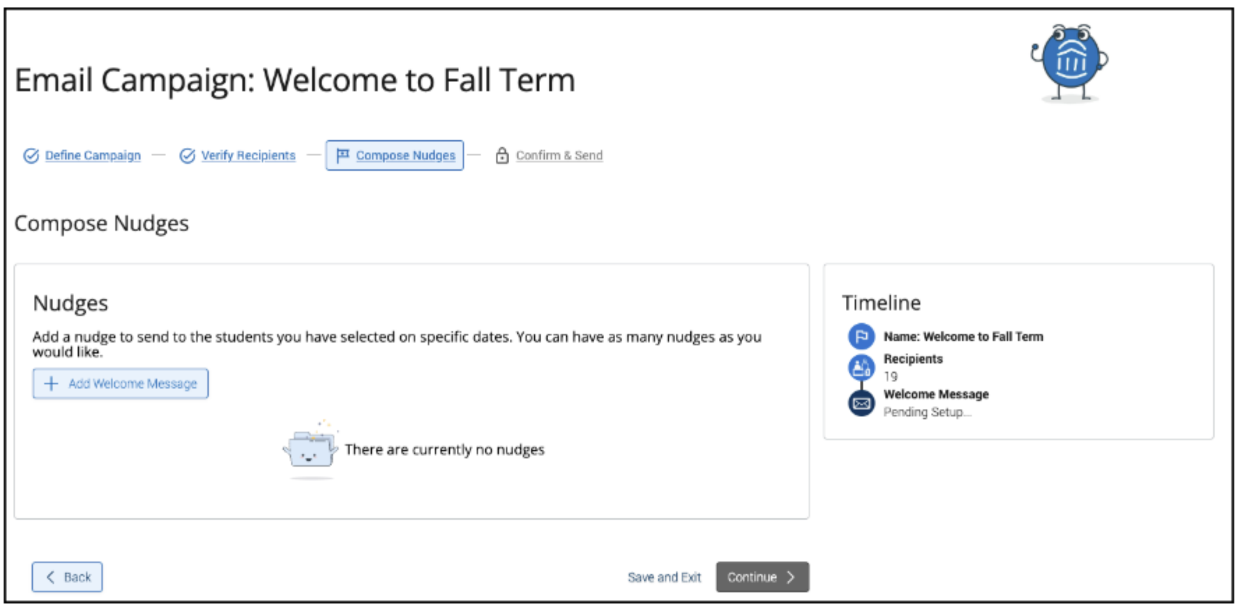
Add Welcome Message, Nudges and Success Message

> **Note.** Welcome messages are the first nudge sent to students.

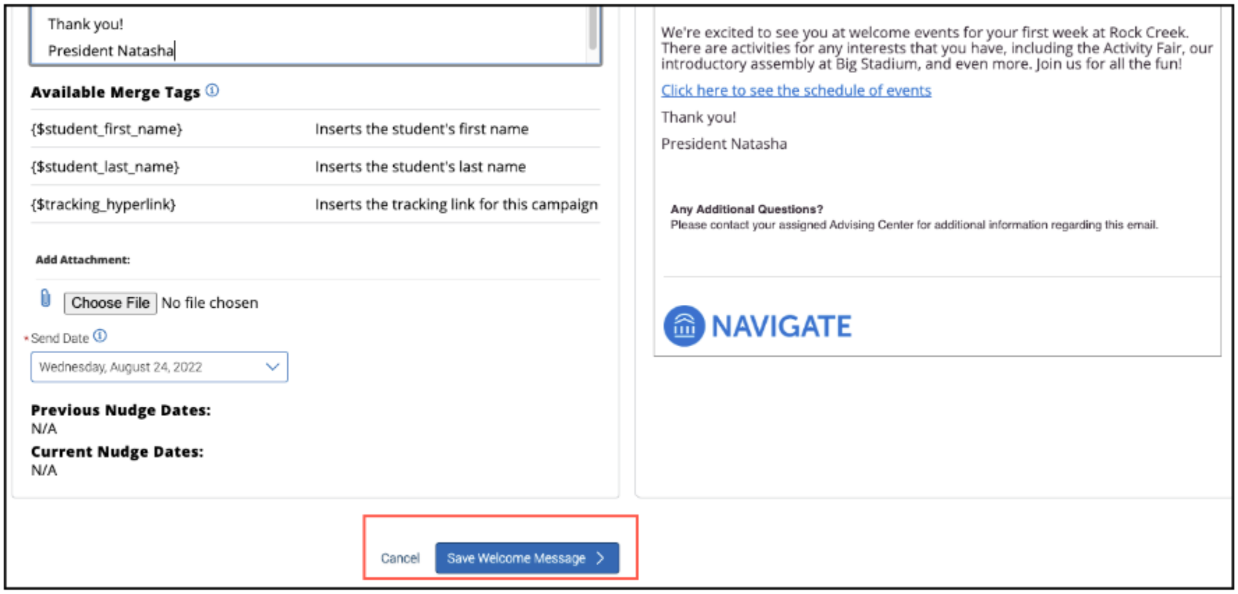
Nudges replace the Compose a Message functionality and allows for more communication from your school to students during an Appointment Campaign. Each nudge is an email sent to your campaign list. You can customize the message sent to the student; however, the link and link text will always be the URL and text set in the first step of the Appointment Campaign.

Nudge emails are sent the morning of the date chosen when you create the nudge. Welcome messages send immediately after starting the appointment campaign. As with any email, some may be slightly delayed.

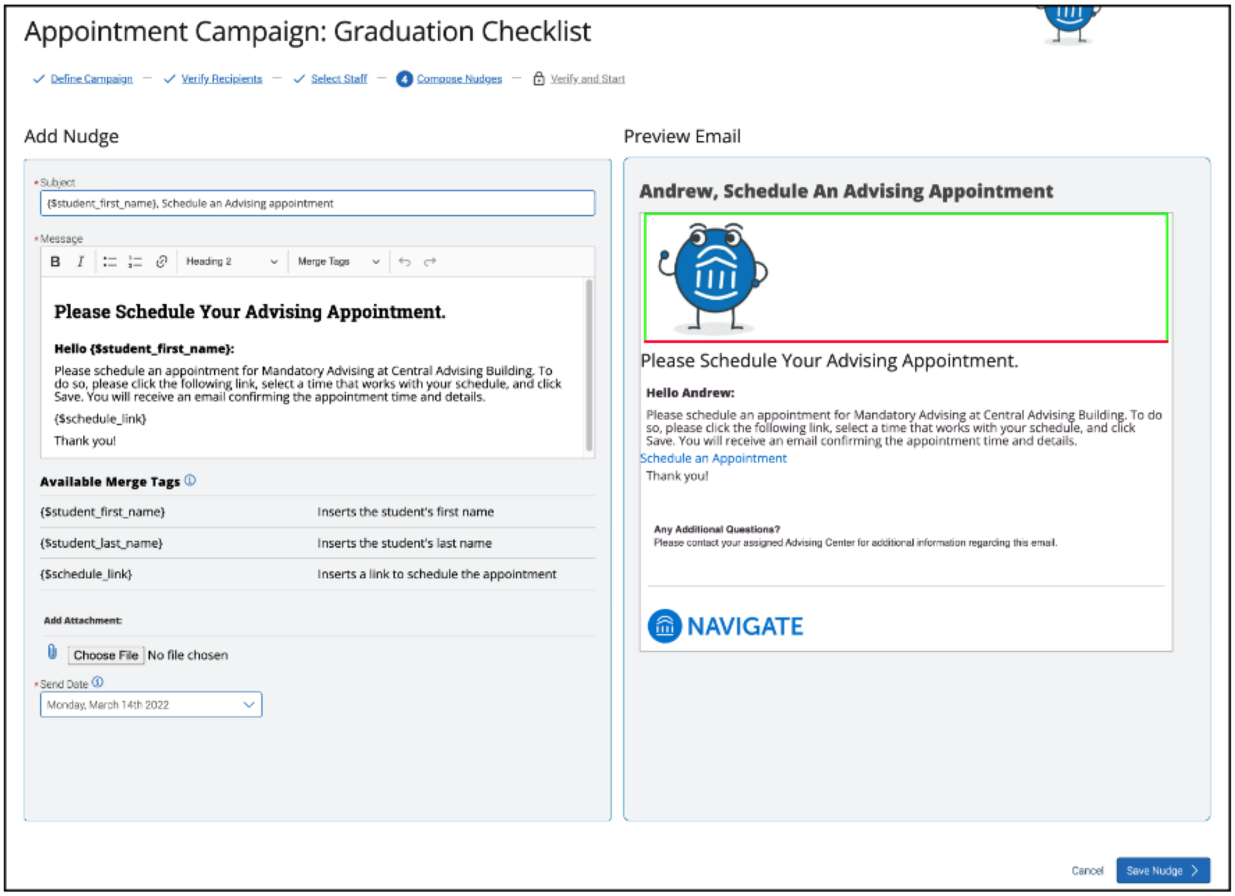
To create a nudge, define your campaign and create your list of students for the Appointment Campaign. The Nudges page opens.



Click **Add Welcome Message** to create your first nudge. When composing the Welcome Message nudge, the compose message page shows **Save Welcome Message** instead of **Save Nudge** at the bottom.



You must create at least one nudge per campaign; however, you can create more. There are no limits on how many nudges you can send.



Warning. Do not remove the schedule link from the email body.

Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel. You can also attach a file to this message.

Fields used in the message composition are:

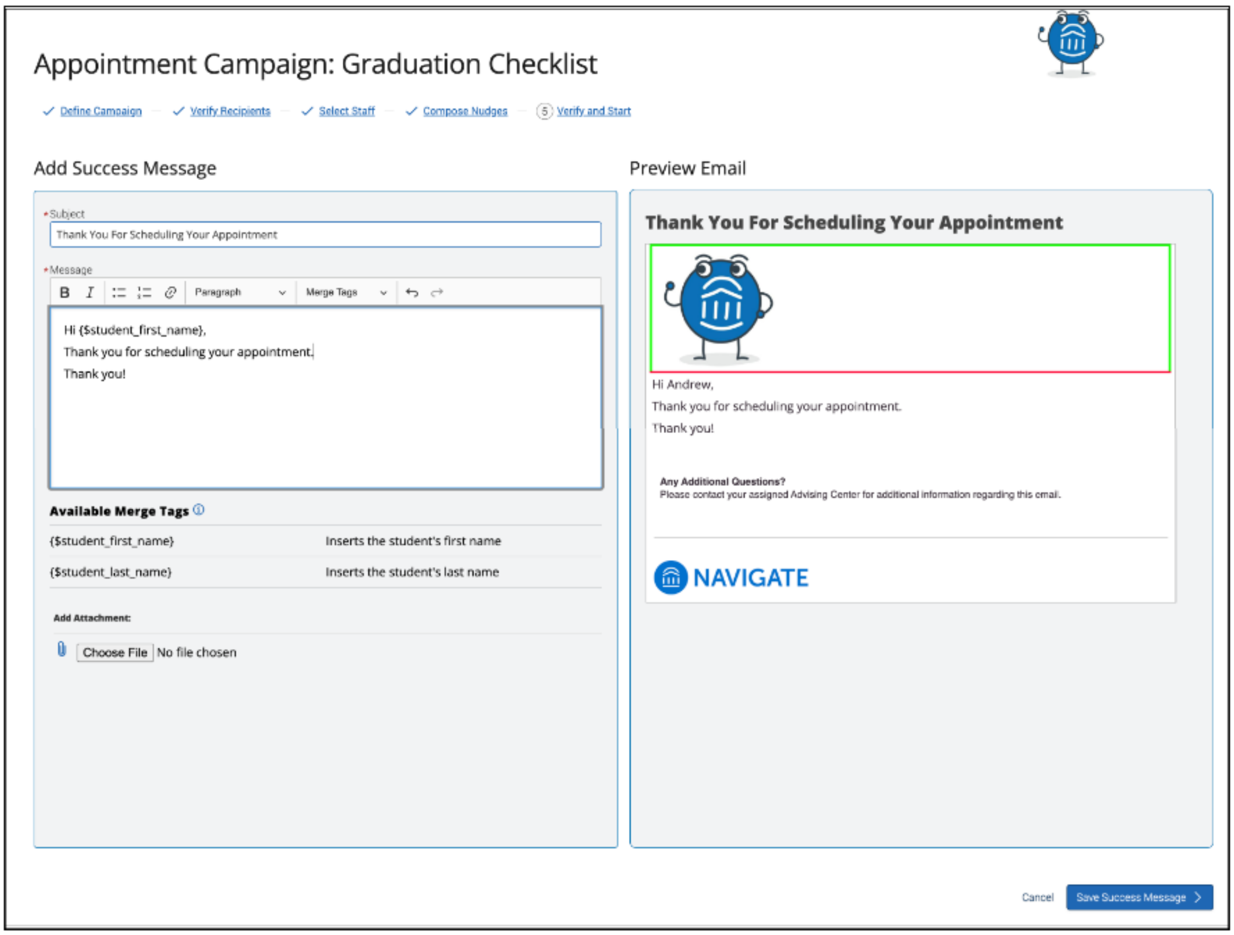
Email Subject
: The subject of the nudge email going to the student. It is Schedule an Appointment by default.

Message
: The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date
: The date the email nudge is sent.

After creating a nudge, click **Save Nudge** to continue. You may continue creating nudges after this.

You can also create a Success Message on the Nudges step of an Appointment Campaign. This is an email sent the day after the recipient schedules all appointments for the campaign. It is for communication purposes only. Click **Add Success Message** to start creating a Success Message.

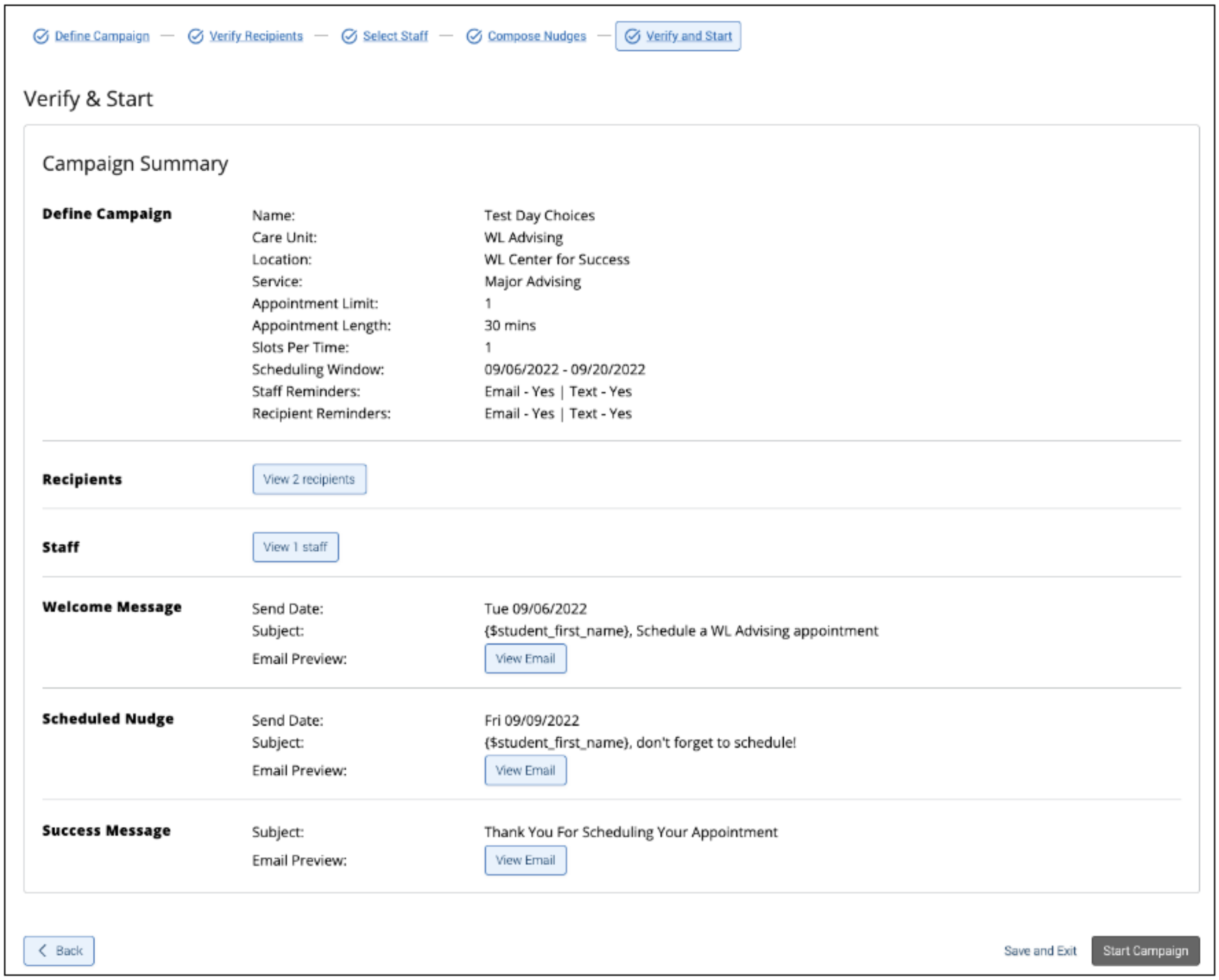


The **Add Success Message** page is like the Add Nudge page; however, there is no Send Date because the Success Message only sends after the student schedules an appointment. You may also use merge tags when writing your Success Message.

After you have finished composing your message, it's time to send out your campaign!

Verify and Start

Review your campaign details, nudges, invitees, and advisors on this page.



Click **Start Campaign** when you are ready to email the invites to the selected students.