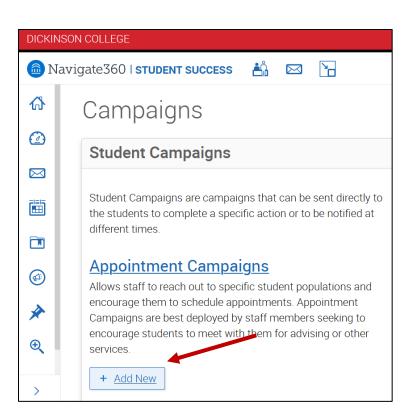
# **Digging Deeper-Appointment Campaigns**

NAVIGATE OFFERS THE CAPABILITY OF MESSAGING A COHORT OF STUDENTS AND REQUESTING THEY SCHEDULE AN APPOINTMENT DURING A CERTAIN TIME PERIOD (IE. YOUR ADVISEES, THE WEEK BEFORE COURSE REQUEST). THIS IS CALLED AN APPOINTMENT CAMPAIGN.

DICKIN	ISON COLLEGE	
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ቆ		
	Staff Home	Dickinson
	Students Appointments My Availability Appointment Queues	Quick Links
	Assigned Students	Take me to
	List Type: Assigned Students Term: Spring 2024 (Default T 🔻	School Information
$\bigcirc$	Relationship Type: All Relationship Types	Campaigns
*	Actions *	
€	□ NAME ♦ ID ♦ STUDENT LIST ♦ CATEGORY ♦ AT RISK? ♦ EMAIL ♦ HOME PHONE ♦ WORK PHON	Upcoming Appointments
≣	No matching records found	You have no upcoming appointments.

CLICK ON THE MEGAPHONE ICON ON THE LEFT-HAND SIDE OF THE HOME SCREEN

> THEN CLICK ON "ADD NEW" APPOINTMENT CAMPAIGN



# THERE ARE 5 STEPS TO SETTING UP AN APPOINTMENT CAMPAIGN

## **STEP ONE –** DEFINE CAMPAIGN

Edit Appointment Campaign: Course Request Spring 20.
Offine Campaign Select Recipients Select Staff Compose Nudges I Verify and Start

	Location: *	
$\sim$	Faculty Office	$\times$ $\checkmark$
)		
-	~	

Appointment Con	figurations		
Appointment Limit: *		Appointment Length: *	
1	× ~	30 min	×
Slots Per Time: *	× ~		
Allow Scheduling Over Co	ourses		
Staff Reminders:	taff Reminders: Recipient Reminders:		
🖌 Email 🖌 Text	🖌 Email	✓ Text	

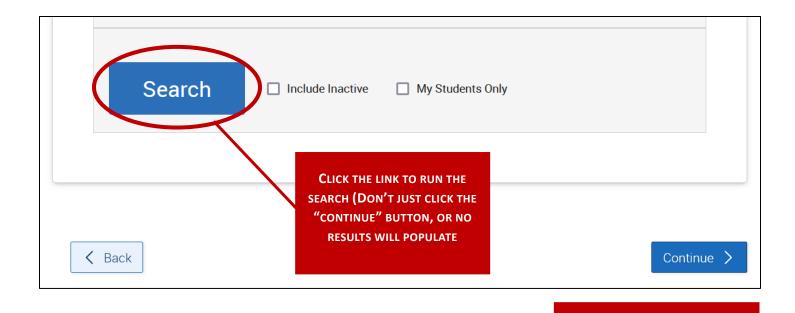
Scheduling Window				
Campaign appointments and events can be scheduled on any date within the scheduling window. For one-time events, select the same date for the start and end dates. Your campaign will begin automatically on the date of your first nudge.				
Start Date *	End Date *			
March 18, 2024 🗸	March 27, 2024 🗸			
Launch Date will be the date that the "Welcome Message" will send. If students are added to your Campaign after this launch date via Automation, the "Welcome Message" will send to that student as soon as they are added.				
Launch Date *				

# **STEP TWO –** SELECT RECIPIENTS



Student Info Student List	rmation First Name,	Last Name,	Student	ID, Category, Tag, 🔺
First Name?	Last Name?	From Last	To Last	Student ID <sup>?</sup>
		Name ?	Name ?	
				$\frown$
				Student List (In Any of These)
				All
E-mail(s)	Category (In Any of these)			
	- All			
	0			
Tag (In Any of these) $^{?}$				
All				
0				

YOU CAN USE A LIST THAT YOU'VE ALREADY MADE IN THE SYSTEM (SEE: NAVIGATE-CREATING LISTS), YOU CAN PASTE IN A LIST OF STUDENT I'S OR EMAIL ADDRESSES FROM ANOTHER DOCUMENTS, OR YOU CAN DO A SEARCH BASED ON CRITERIA, SUCH AS CLASS ENROLLMENT



CHECK THE BOX NEXT TO NAME

	Actions <b>▼</b>	TO AUTOMATICALLY SELECT ALL NAMES ON THE LIST, THEN CLICK "CONTINUE." AFTER CLICKING
	NAME ID   1. ID   2. ID   3. ID   4. ID	"Continue," the system will prompt you do to do this a second time (Review Recipients in Campaign.")
	Previous 1 Next 4 total results	
<	Back Continue >	

# **STEP THREE –** SELECT STAFF

IN ORDER FOR YOU SO APPEAR AS "AVAILABLE STAFF" YOU MUST HAVE ALREADY DONE THE FOLLOWING WHEN ORIGINALLY SETTING UP YOUR AVAILABILITY IN NAVIGATE:

- 1. INCLUDED AVAILABILITY WITHIN THE DATE PARAMETERS SELECTED IN STEP ONE OF THE CAMPAIGN
- 2. INDICATED THAT YOUR AVAILABILITY IS FOR APPOINTMENTS AND CAMPAIGNS

IF THOSE STEPS HAVE BEEN TAKEN, YOU SHOULD THEN SHOW UP IN THE LIST OF "AVAILABLE STAFF."

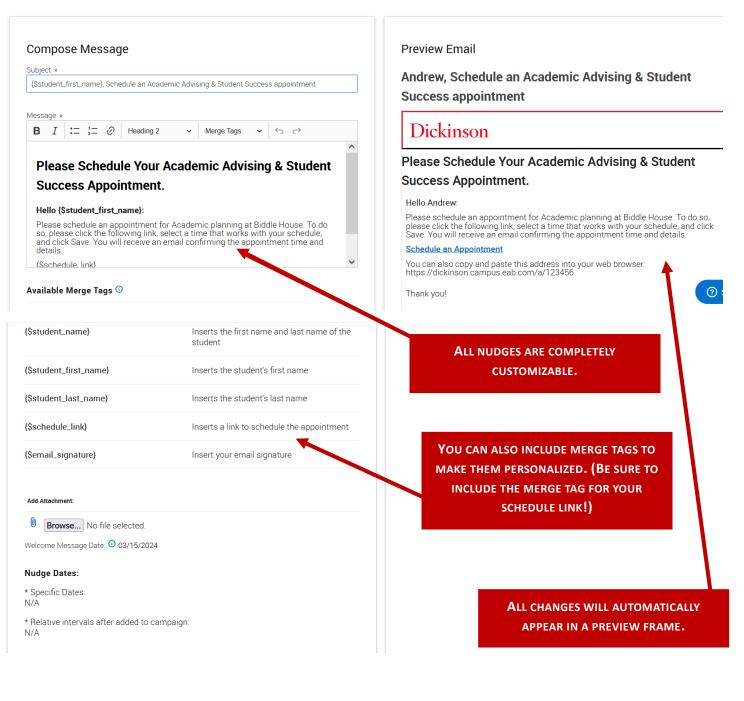


# **STEP FOUR –** COMPOSE NUDGES

NUDGES ARE THE MESSAGES THAT GET SENT TO STUDENTS, INCLUDING THE WELCOME MESSAGE, OPTIONAL SUCCESS MESSAGE, AND OPTION REMINDER MESSAGES.

Select Staff — Compose Nudges — Select Staff — Compose Nudges — Select Staff
Compose Nudges
Nudges What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign. + Add Welcome Message
There are currently no nudges

### Add Welcome Message



Compose Nudges

Additional Nudges can be set up as reminders. These nudges can be scheduled for specific dates, and will **ONLY** go to individuals who have not yet scheduled.

### Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

Ø

#### + Add Nudge

#### Welcome Message

#### Send Date: 03/15/2024

Email Subject: {\$student\_first\_name}, Schedule an Academic Advising & Student Success appointment

Email Message: Please schedule your Academic Advis..

### **STEP FIVE –** VERIFY AND SEND

NUDGES ARE THE MESSAGES THAT GET SENT TO STUDENTS, INCLUDING THE WELCOME MESSAGE, OPTIONAL SUCCESS MESSAGE, AND OPTION REMINDER MESSAGES.

