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.

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

THEN CLICK ON "ADD NEW" APPOINTMENT CAMPAIGN

STEP ONE – DEFINE CAMPAIGN

Edit Appointment Campaign: Course Request Spring 20...

✓ Define Campaign — Select Recipients — Select Staff — 🔒 Compose Nudges — 🔒 Verify and Start

Campaign Configurations

Campaign Name *

Course Request Spring 2024

Instructions or Notes for Landing Page:

Care Unit: *

Faculty ✕ ⌄

Location: *

Faculty Office ✕ ⌄

Service: *

Academic Advising Session-30 minu ✕ ⌄

Appointment Configurations

Appointment Limit: *

1 ✕ ⌄

Appointment Length: *

30 min ✕ ⌄

Slots Per Time: *

1 ✕ ⌄

☐ Allow Scheduling Over Courses

Staff Reminders:
☑ Email ☑ Text

Recipient Reminders:
☑ 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 *

| March 18, 2024 ∨ |

End Date *

| March 27, 2024 ∨ |

Launch Date

This 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 *

| March 15, 2024 ∨ |

STEP TWO – SELECT RECIPIENTS

✓ Define Campaign — 🚩 Select Recipients — Select Staff — 🔒 Compose Nudges — 🔒 Verify and Start

Add Recipients To Campaign

Student Information First Name, Last Name, Student ID, Category, Tag, Student List

First Name?

Last Name?

From Last Name?

To Last Name?

Student ID?

Student List (In Any of These)

All

E-mail(s)

Category (In Any of these)?

All ➕

Tag (In Any of these)?

All ➕

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

Search ☐ Include Inactive ☐ My Students Only

< Back   Continue >

Actions ▼

☑ NAME	⇕ ID ⇕
1. ☑	
2. ☑	
3. ☑	
4. ☑	

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.

Add Welcome Message

Compose Message

Subject *

{$student_first_name}, Schedule an Academic Advising & Student Success appointment

Message *

| **B** | *I* | :≡ | ≡ | 🔗 | Heading 2 ▾ | Merge Tags ▾ | ↶ | ↷ |

Please Schedule Your Academic Advising & Student Success Appointment.

Hello {$student_first_name}:

Please schedule an appointment for Academic planning at Biddle House. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{$schedule_link}

Available Merge Tags ⓘ

{$student_name}	Inserts the first name and last name of the student
{$student_first_name}	Inserts the student's first name
{$student_last_name}	Inserts the student's last name
{$schedule_link}	Inserts a link to schedule the appointment
{$email_signature}	Insert your email signature

Add Attachment:

📎 [Browse...] No file selected.

Welcome Message Date: ⓘ 03/15/2024

Nudge Dates:

* Specific Dates:
N/A

* Relative intervals after added to campaign:
N/A

Preview Email

Andrew, Schedule an Academic Advising & Student Success appointment

Dickinson

Please Schedule Your Academic Advising & Student Success Appointment.

Hello Andrew:

Please schedule an appointment for Academic planning at Biddle House. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

Schedule an Appointment

You can also copy and paste this address into your web browser.
https://dickinson.campus.eab.com/a/123456

Thank you!

ALL NUDGES ARE COMPLETELY CUSTOMIZABLE.

YOU CAN ALSO INCLUDE MERGE TAGS TO MAKE THEM PERSONALIZED. (BE SURE TO INCLUDE THE MERGE TAG FOR YOUR SCHEDULE LINK!)

ALL CHANGES WILL AUTOMATICALLY APPEAR IN A PREVIEW FRAME.

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.

[+ 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.

⊘ Define Campaign — ⊘ Verify Recipients — ⊘ Select Staff — ⊘ Compose Nudges — ⚑ Verify and Start

Verify & Start

Campaign Summary

Define Campaign		
	Name:	Example Campaign
	Care Unit:	Academic Advising & Student Success
	Location:	Biddle House
	Service:	Academic planning
	Appointment Limit:	1
	Appointment Length:	30 mins
	Slots Per Time:	1
	Scheduling Window:	03/18/2024 - 03/27/2024
	Allow Scheduling Over Courses:	No
	Staff Reminders:	Email - No	Text - No
	Recipient Reminders:	Email - Yes	Text - Yes

REVIEW THE CAMPAIGN PARAMETERS, RECIPIENTS, STAFF, TEXT OF THE MESSAGES

Recipients   [View 4 recipients]

Staff   [View 1 staff]

Welcome Message
Send Date: Day added
Subject: {$student_first_name}, Schedule an Academic Advising & Student Success appointment
Email Preview: [View Email]

[‹ Back]   Save and Exit   [Start Campaign]

YOU MUST CLICK "START CAMPAIGN" FOR THE MESSAGE(S) TO BE DISPATCHED. THE CAMPAIGN WILL NOT BEGIN BY JUST CLICKING "SAVE AND EXIT."