

## 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.

### Appointment Campaigns

Allows staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

+ Add New


## 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

### New Appointment Campaign



[Define Campaign](#) — [Select Recipients](#) — [Select Staff](#) — [Compose Nudges](#) — [Verify and Start](#)

#### Define Campaign

Set up your campaign. Specify your appointment details and timing.

##### Campaign Configurations

\* Campaign Name:  Instructions or Notes for Landing Page:

\* Care Unit:  \* Location:

\* Service:

##### Appointment Configurations

\* Appointment Limit:  \* Appointment Length:

\* Slots Per Time:






Staff Reminders:  Email  Text    Recipient Reminders:  Email  Text

##### Scheduling Window

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

\* Start Date:  \* End Date:

##### Timeline

-  **Objective**  
Pending Setup...
-  **Recipients**  
Pending Setup...
-  **Staff**  
Pending Setup...
-  **Welcome Message**  
Pending Setup...
-  **Campaign Ends**  
Pending Setup...

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 1<sup>st</sup> 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.

Add Students To Campaign

**Advanced Search**

Saved Searches -

Keywords (First Name, Last Name, E-mail, Student ID)

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

First Name? Last Name? From Last Name? To Last Name? Student ID?

Gender: All Race: All Watch List (In Any of These): All Transfer Student:

Category (In Any of these?): All Tag (In Any of these?): All

Enrollment History Enrollment Terms

Area of Study College/School, Degree, Concentration, Major

Performance Data GPA, Hours, Credits

Term Data Classification, Section Tag, Term GPA

Course Data Course, Status

Assigned To Advisor, Tutor, Coach

Success Indicators Concern, Success Markers

Search  My Students Only  Include Inactive

< Back Continue >

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**.

### Review Recipients in Campaign

Actions ▾

| <input type="checkbox"/> NAME            |
|--|
| <input type="checkbox"/> Aamot, Synnove  |
| <input type="checkbox"/> Aanderud, Perdy |
| <input type="checkbox"/> Aanderud, Priti |
| <input type="checkbox"/> Aanderud, Tevy  |
| <input type="checkbox"/> Aanderud, Venus |

### Timeline

- 📅 **Objective: Schedule Appointment(s)**  
By Fri 09/30/2022
- 👤 **Recipients**  
Pending Setup...
- 👤 **Staff**  
Pending Setup...
- ✉️ **Welcome Message**  
Pending Setup...
- 📅 **Campaign Ends**  
Fri 09/30/2022

## 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.

## Appointment Campaign: Graduation Checklist

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

### Select Staff For Campaign

Include Appointment Availabilities

| ID                       | NAME            | AVAILABLE TIMES  |
|--------------------------|-----------------|--|
| <input type="checkbox"/> | Mariano Bogan   | <b>For: Appointments</b> Tue-Thu 8:00am - 5:00pm ET                    |
| <input type="checkbox"/> | Jeromy O'Conner | <b>For: Appointments/Drop-Ins/Campaigns</b> Mon-Fri 9:00am - 6:00pm ET |
| <input type="checkbox"/> | Will Purdy      | <b>For: Appointments/Drop-Ins</b> Mon, Wed 12:45pm - 5:15pm ET         |
| <input type="checkbox"/> | Kailey Bernhard | <b>For: Appointments</b> Tue-Thu 8:00am - 5:00pm ET                    |

#### TIMELINE

- 📅 **Objective: Schedule Appointment(s)**  
By Mon 03/28/2022
- 👤 **Recipients**  
4
- 👤 **Staff**  
Pending Setup...
- ✉️ **Nudge 1**  
Pending Setup...
- 📅 **Campaign Ends**  
Mon 03/28/2022

← Back
Save and Exit
Continue >

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

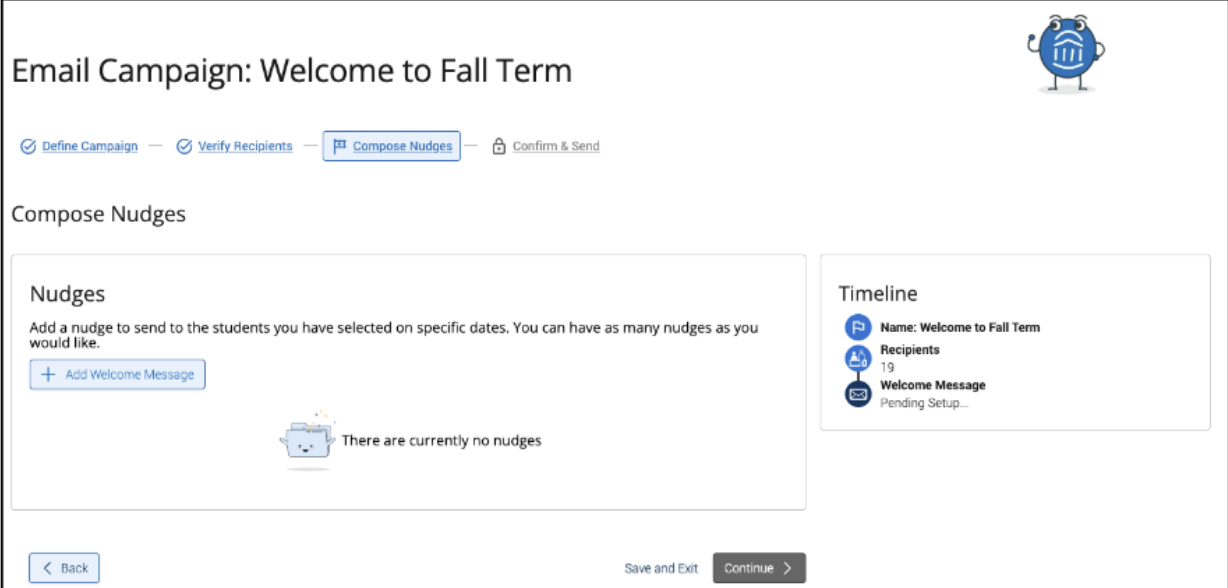
## Add Welcome Message, Nudges and Success Message

**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.



The screenshot displays the 'Email Campaign: Welcome to Fall Term' interface. At the top right is a blue alarm clock icon. Below the title is a progress bar with four steps: 'Define Campaign' (checked), 'Verify Recipients' (checked), 'Compose Nudges' (active), and 'Confirm & Send' (locked). The main content area is titled 'Compose Nudges' and is divided into two panels. The left panel, 'Nudges', contains the text 'Add a nudge to send to the students you have selected on specific dates. You can have as many nudges as you would like.' and a '+ Add Welcome Message' button. Below this is a message box with a blue folder icon and the text 'There are currently no nudges'. The right panel, 'Timeline', shows a list of items: 'Name: Welcome to Fall Term', 'Recipients: 19', and 'Welcome Message: Pending Setup...'. At the bottom of the interface are three buttons: '< Back', 'Save and Exit', and 'Continue >'.


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.

Thank you!  
President Natasha

**Available Merge Tags** ⓘ

|                      |   |
|----------------------|---|
| {student_first_name} | Inserts the student's first name            |
| {student_last_name}  | Inserts the student's last name             |
| {tracking_hyperlink} | Inserts the tracking link for this campaign |

**Add Attachment:**

  No file chosen

\* Send Date ⓘ

Wednesday, August 24, 2022

**Previous Nudge Dates:**  
N/A

**Current Nudge Dates:**  
N/A


Cancel

We're excited to see you at welcome events for your first week at Rock Creek. There are activities for any interests that you have, including the Activity Fair, our introductory assembly at Big Stadium, and even more. Join us for all the fun!

[Click here to see the schedule of events](#)

Thank you!  
President Natasha

**Any Additional Questions?**  
Please contact your assigned Advising Center for additional information regarding this email.



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.

**Appointment Campaign: Graduation Checklist**

✓ Define Campaign - ✓ Verify Recipients - ✓ Select Staff - 4 Compose Nudges - Verify and Start

**Add Nudge**

\*Subject  
 ({student\_first\_name}), Schedule an Advising appointment

\*Message

**Please Schedule Your Advising Appointment.**

**Hello ({student\_first\_name}):**  
 Please schedule an appointment for Mandatory Advising at Central Advising Building. 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})  
 Thank you!

**Available Merge Tags**


|                      |  |
|----------------------|--|
| {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 |

Add Attachment:  
 No file chosen

\*Send Date  
 Monday, March 14th 2022

**Preview Email**


**Andrew, Schedule An Advising Appointment**



**Please Schedule Your Advising Appointment.**

**Hello Andrew:**  
 Please schedule an appointment for Mandatory Advising at Central Advising Building. 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](#)  
 Thank you!

**Any Additional Questions?**  
 Please contact your assigned Advising Center for additional information regarding this email.



Cancel

**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 screenshot displays the 'Appointment Campaign: Graduation Checklist' interface. At the top right is a blue robot icon. Below the title is a progress bar with five steps: 'Define Campaign', 'Verify Recipients', 'Select Staff', 'Compose Nudges', and '5 Verify and Start'. The main area is split into two panels: 'Add Success Message' on the left and 'Preview Email' on the right.

**Add Success Message Panel:**

- Subject:** Thank You For Scheduling Your Appointment
- Message:** A rich text editor with a toolbar (Bold, Italic, Bulleted List, Numbered List, Link, Paragraph, Merge Tags, Undo, Redo) containing the text: "Hi {{student\_first\_name}}, Thank you for scheduling your appointment. Thank you!"
- Available Merge Tags:**
  - {student\_first\_name} Inserts the student's first name
  - {student\_last\_name} Inserts the student's last name
- Add Attachment:** A 'Choose File' button with the text 'No file chosen'.

**Preview Email Panel:**

- Title:** Thank You For Scheduling Your Appointment
- Image:** A blue robot icon with arms and legs.
- Text:** "Hi Andrew, Thank you for scheduling your appointment. Thank you!"
- Text:** "Any Additional Questions? Please contact your assigned Advising Center for additional information regarding this email."
- Image:** The NAVIGATE logo.

At the bottom right of the interface are 'Cancel' and 'Save Success Message' buttons.

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.

Define Campaign — Verify Recipients — Select Staff — Compose Nudges — **Verify and Start**

### Verify & Start

#### Campaign Summary

|                        |                      |                          |
|------------------------|----------------------|--------------------------|
| <b>Define Campaign</b> | Name:                | Test Day Choices         |
|                        | Care Unit:           | WL Advising              |
|                        | Location:            | WL Center for Success    |
|                        | Service:             | Major Advising           |
|                        | Appointment Limit:   | 1                        |
|                        | Appointment Length:  | 30 mins                  |
|                        | Slots Per Time:      | 1                        |
|                        | Scheduling Window:   | 09/06/2022 - 09/20/2022  |
|                        | Staff Reminders:     | Email - Yes   Text - Yes |
|                        | Recipient Reminders: | Email - Yes   Text - Yes |

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**Recipients** [View 2 recipients](#)

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**Staff** [View 1 staff](#)

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|                        |                |  |
|------------------------|----------------|--|
| <b>Welcome Message</b> | Send Date:     | Tue 09/06/2022   |
|                        | Subject:       | {student_first_name}, Schedule a WL Advising appointment |
|                        | Email Preview: | <a href="#">View Email</a>                               |

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|                        |                |   |
|------------------------|----------------|---|
| <b>Scheduled Nudge</b> | Send Date:     | Fri 09/09/2022                                  |
|                        | Subject:       | {student_first_name}, don't forget to schedule! |
|                        | Email Preview: | <a href="#">View Email</a>                      |

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|                        |                |   |
|------------------------|----------------|---|
| <b>Success Message</b> | Subject:       | Thank You For Scheduling Your Appointment |
|                        | Email Preview: | <a href="#">View Email</a>                |

[< Back](#) [Save and Exit](#) [Start Campaign](#)

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