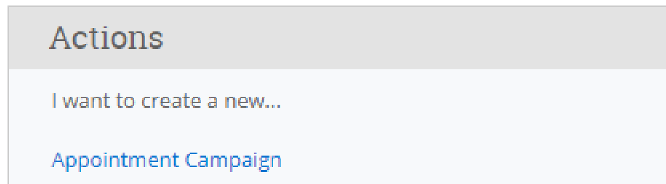
How-To Administer an Appointment Campaign

Appointment Campaigns are a useful tool to help drive students to come meet with you. They can be run on specific populations that you work with by using the advanced search feature, students in a specific class or section, by creating a watch list/student list or sending the campaign to every student assigned to you in Bay Advisor. There are five steps in setting up and launching an Appointment Campaign outlined in Part 1. Before you begin, it is recommended to adjust the involved advisors' availability to allow for campaigns. Once the Campaign is sent, you may edit, resend, and pull statistics from the campaign. These are discussed in Part 2.

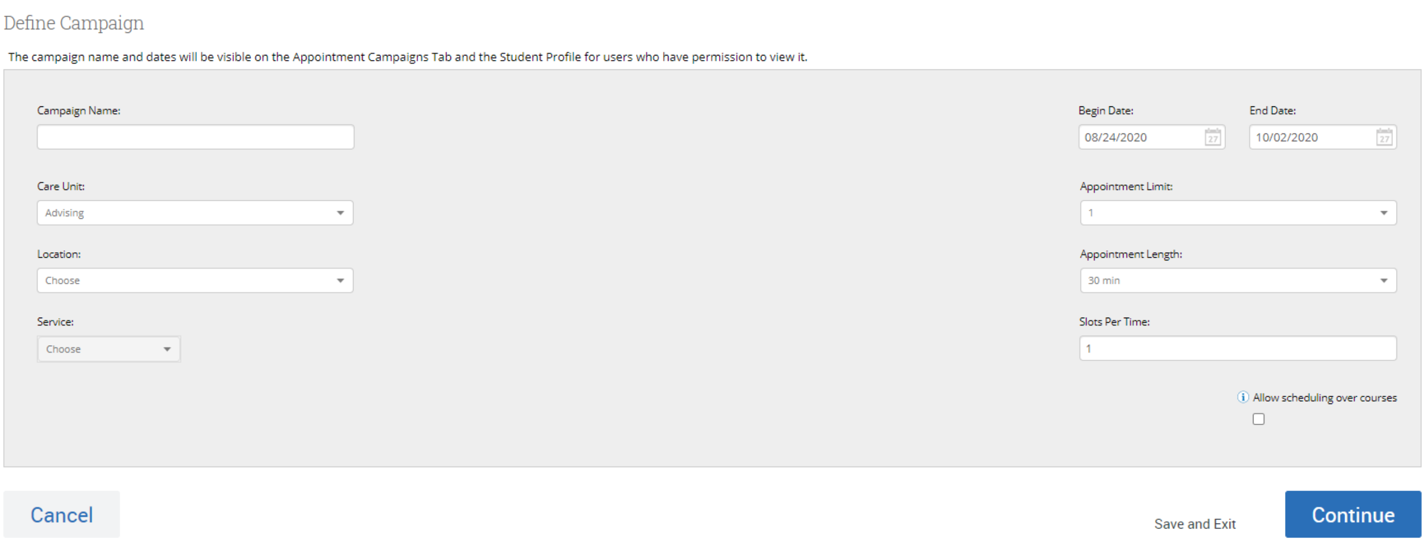
Part I.

Setting Up and Sending the Appointment Campaign

To begin an appointment Campaign, click on the Campaign menu Icon. This will open your Bay Advisor Campaigns. To start a campaign, click on Appointment Campaign in the Actions Window.



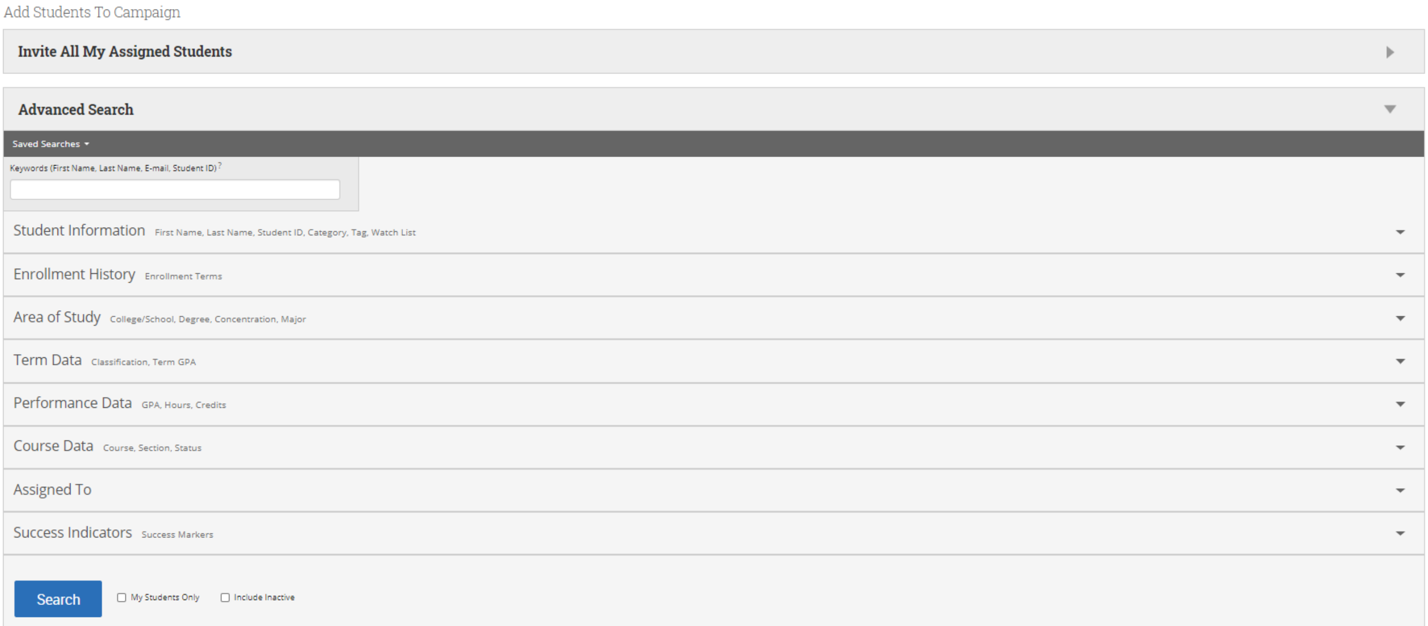
Step 1 (Define Campaign). Fill out the fields shown below:



Start by **naming your campaign**. This is for you, your records and to help you remember what each of your campaigns cover. It helps to state the semester, units, population identified or something you know personally about the cohort to help you remember as students begin to make appointments with you. Select your **care unit** (advising), your **location** and the **service** within the location that the appointments derived from the campaign will be categorized under. The location and service need to match the advisors campaign availability. Be sure to select the dates for the campaign. The **begin date and end date** will be the window in which students can select the campaign link and make an appointment. Once the end date arrives, the campaign will close and no more appointments can be made. **Appointment Limit** is usually kept at 1, but this is the number of appointments each student can make from the campaign email link sent to them. **Appointment Length** is customizable for the specific campaign as well as slots per time. **Slots per time** is how many students can schedule a meeting during that appointment time. Typically, this is set to 1, but if you want to do group appointments you can be increasing the slots per time number. Lastly, you can allow your students to **schedule over course times**. This is NOT recommended as any course that is offered starting in Fall of 2020 with a given time, is taught synchronously at that given time no matter if the course is in person or virtual.

After this first step is complete, you can always select save and exit and return to setting up your campaign. If you happened to close out of the campaign before saving it, each step is saved along the way so you can return to where you left off.

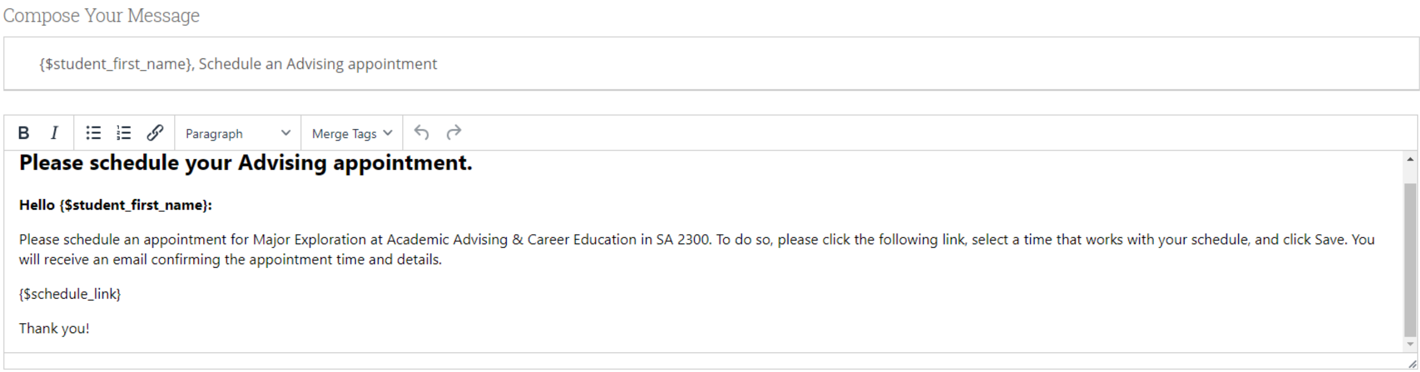
Step 2 (Student Select). Search and select students to be included in the campaign. Using the Advanced Search feature, you can select a created watch list/student list, students from a specific course and section, or run your own search for the specific population you want to send the campaign to.



Review and Confirm the students in your campaign. Here you can remove any students you don't want to be part of the campaign by clicking the box to the left of their name, going to actions and selecting Remove Selected Users. Once reviewed select Continue to move onto Step 3.

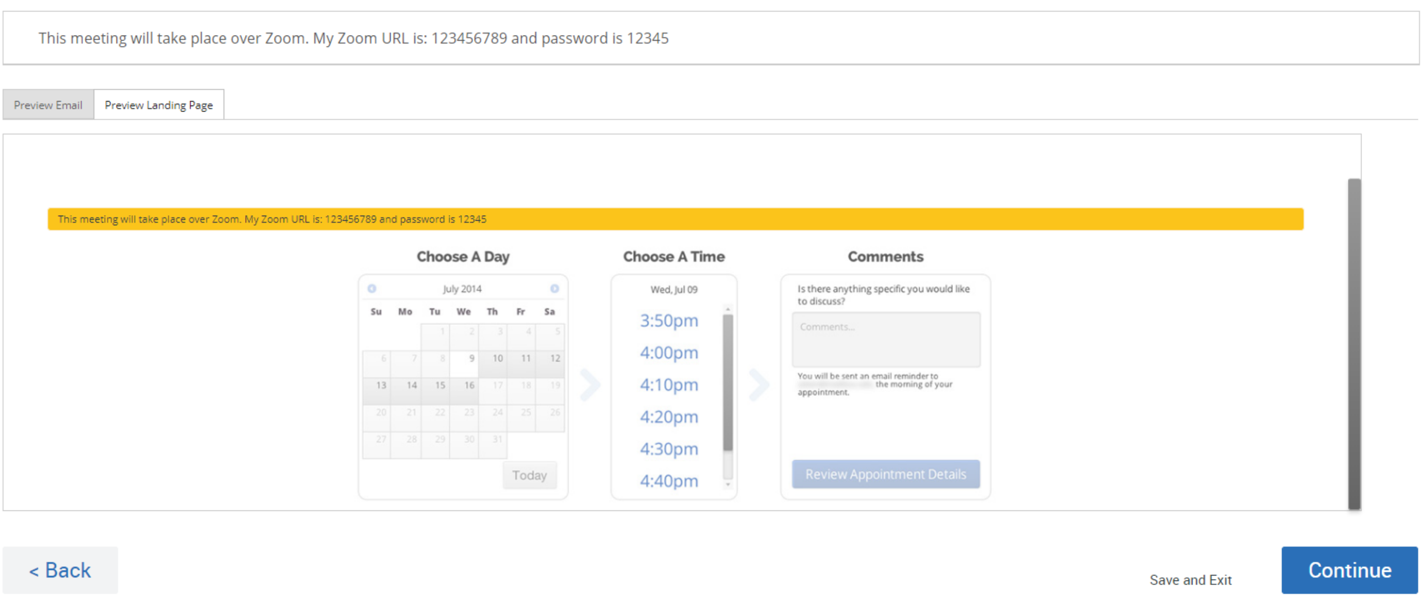
Step 3 (Staff Select). Here is where you will add "Organizers" or the advisors that students will be scheduling their appointments with. This window will show the advisors in the specified location who have availability for the specified service from step 1. **<u>The advisors will need to also be sure that their availability is set for Campaigns for this to work.</u>**

Step 4 (Message Details). Now that you have defined your campaign, selected the students and with whom they are going to be meeting with, it is time to write them the all-important message. Bay Advisor will give you a blank template which you modify to fit your needs here in step 5. The students first names will auto populate into the email to make it seem more personalized. It is recommended that you keep your messaging short and to the point. DO NOT REMOVE THE SCHEDULE LINK FROM THE EMAIL. Also, in step 5 you can preview your written message, preview the scheduling landing page, and craft a banner message for the landing page. This allows you to see exactly what the student experience is like and modify it to your needs.

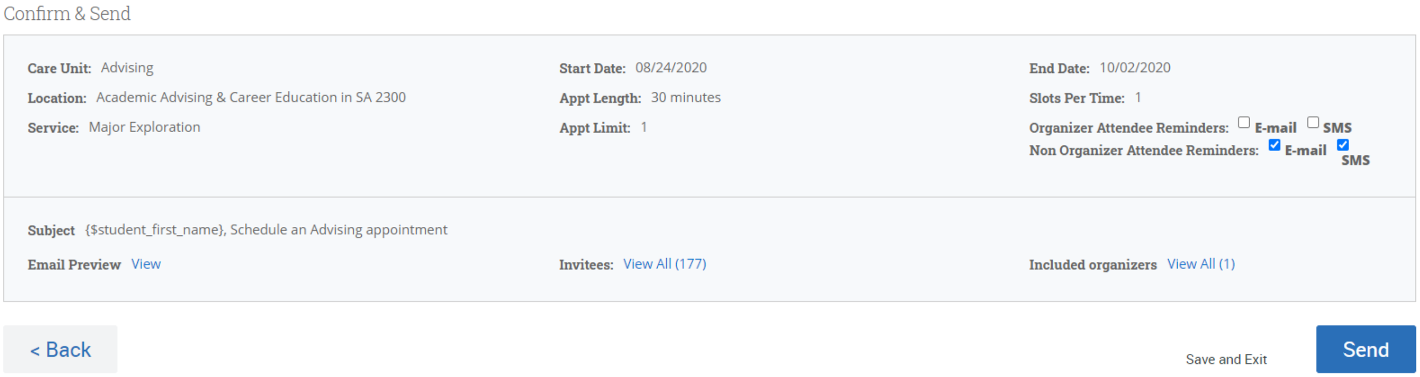


In the lower part of your screen in step 5 there are two tabs, one will allow you to preview the Email, the other to Preview the landing page, where the student will be directed once they click on the campaign link. Directly above this is where you can insert your own banner message with any specialized instructions or message.

<u>Students View when Selecting an Appointment</u>



Step 5 (Confirm and Send). Last step! Simply confirm the information pictured and click send. You can click on the blue links to double check your email, the student invitees, or the organizers (advisors) and not have to go back through the actual campaign to do so.

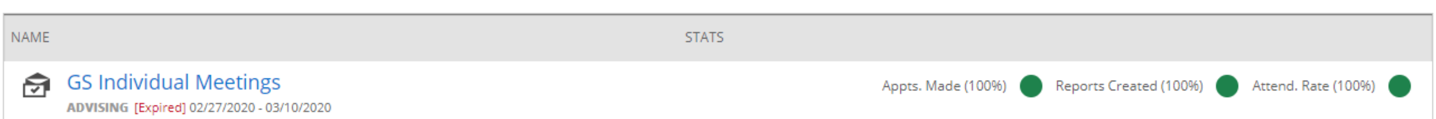


Congratulations! You have sent your campaign. Be patient as students begin to make appointments with you through the link provided.

Part II.

Maintenance, Upkeep, and Edits of the Appointment Campaign Once Sent

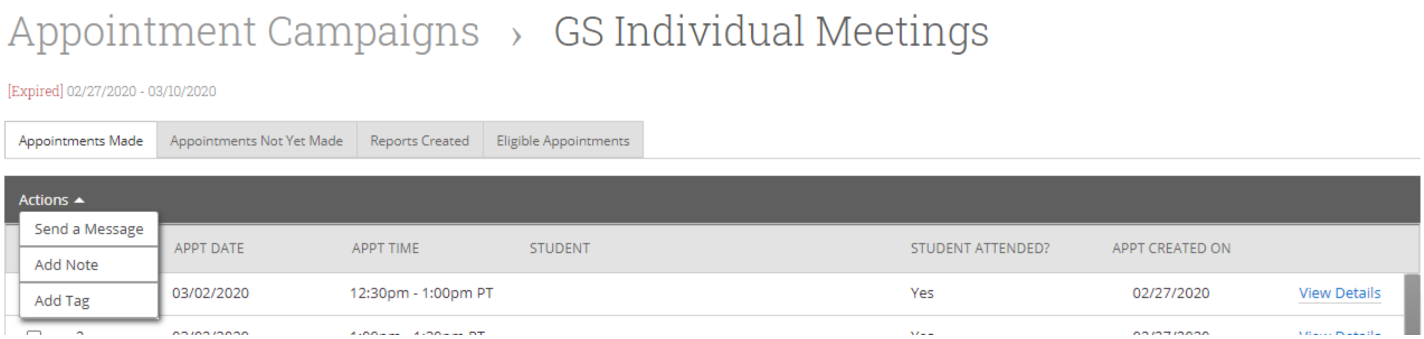
Once the Campaign is sent, you will begin to see three statistics in your campaign page of Bay Advisor; Appts. Made, Reports Created, and Attend. Rate. These three surface statistics will show you the effectiveness of your campaign and help guide you towards your next steps. The first, Appts. Made, is the percentage of students involved in the campaign who have scheduled an appointment. If they are a no-show or cancel the appointment, they will still be counted in this number. Reports Created is the percentage of advising reports you have submitted on those students who have scheduled an appointment. The last, Attendance Rate, shows you the percentage of students who have shown up to their scheduled appointment.



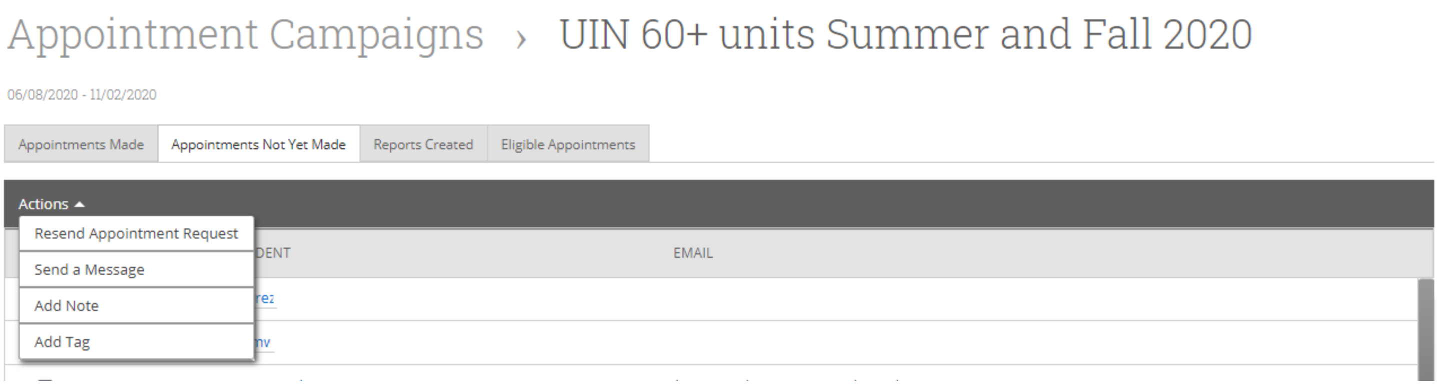
If you have a low rate of Appt. Made, you might want to re-look your availability for the campaign and/or your messaging to your students. To update your availability, please refer to the advisor's user guide. Once you have updated your availability, you should resend the campaign, with new messaging to the students who have not made an appointment. Tips for writing effective advising messages can be found in the help center in Bay Advisor located by clicking the "?" in the upper right hand corner.

You can dive deeper into your campaign by clicking on the title "GS Individual Meetings" and you will see four tabs of information; Appointments Made, Appointments Not Yet Made, Reports Created, and Eligible Appointments.

The Appointment Made tab, where the Appts. Made percentage is derived, will show you the students who have made appointments, the date and time of their appointment, the date it was created, if the student attended, and a link to the appointment details which will allow you to edit or cancel the appointment if necessary. Under the actions menu, you can message select students, or add a note to their file.

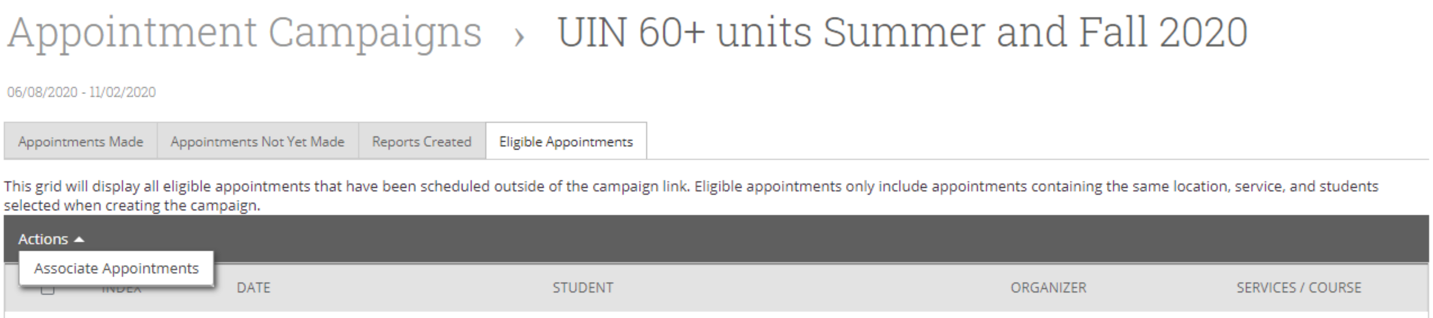


The Appointments Not Yet Made tab shows you the students who have not made an appointment. Under the actions menu you can send a message or add a note to selected students, or you can resend the appointment request message. When you select resend appointment request message, you will be able to edit the message before you send it.



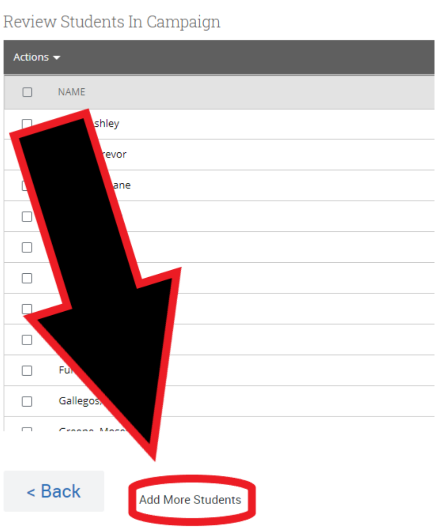
The Reports Created tab shows all the reports created from the campaign and includes the advisor's comments. In the actions menu you can send a message or add a note to selected students.

The Eligible Appointments tab is a display of all the eligible appointments that have been scheduled outside of the campaign link. It will only include the appointments containing the same location, service and students as the campaign. In the actions menu, you can Associate Appointments selected and they will be pulled into the campaign statistics.



Editing or adding students to the campaign:

After selecting your campaign, you will see an Options box in the upper right corner. By selecting Edit Campaign Details, you can modify your ongoing campaign step by step.



In the Student Select step, you can add more students to the campaign after it has been sent by selecting Add More Students. This will take you back to Step 2, where you can search for students to add to the existing campaign. Once the new students are selected and added, you will need to go through the remaining steps of the campaign, make any other edits you wish to make, especially to the email message and then confirm and send the campaign.

Delete This Campaign allows you to delete the campaign from your records.

Export Student List allows you to export the student details who are part of the campaign into Excel.

If you have any questions about campaigns or the Bay Advisor functionalities, please contact Bill Irwin at bill.irwin@csueastbay.edu.