

Navigate360: Advising Early Outreach Appointment Campaigns

Appointment Campaigns let staff reach out to specific student populations and encourage them to schedule appointments. The metrics in this guide are set up for launching an Early Outreach campaign.

1. Create campaign availabilities before creating an appointment campaign

- See the [Create Availabilities](#) Navigate guide to create a new availability for the [Early Outreach Service](#) at the [Academic Advising Location](#) during the Early Outreach initiative timeframe. To create campaign availability:
 - Click the checkbox next to an availability which already contains your [URL](#), and [Special Instructions to the Student](#)
 - Use the [Copy Time](#) feature in the [Actions](#) menu to create an availability which retains [Meeting Types](#), [URL/Phone Number](#), [Special Instructions for Student](#)
 - Edit [How long is this availability active?](#) From the drop-down menu, select [A Range of Dates](#). In the [Starting on](#) box, select [Monday, September 2, 2024](#) from the calendar. In the [Ending on](#) box, select [Friday, September 13, 2024](#) from the calendar
 - Under [What Type of Availability is This?](#) click [Campaigns](#) and un-click [Appointments](#)
 - Under [Care Unit](#) select [Outreach Initiatives](#) from the drop-down menu
 - Under [Location](#) select [Academic Advisement](#) from the drop-down menu
 - Review the [URL](#) And [Special Instructions for Student](#) boxes to ensure Zoom link, phone number, and physical location are all present.

ADD AVAILABILITY

How long is this availability active?

A Range of Dates

Starting on 09/02/2024

Ending on 09/13/2024

Add to your personal availability link?

Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins **Campaigns**

Meeting Type

In Person Virtual

Care Unit

Outreach Initiatives

Location


Academic Advisement

Services

Early Outreach

Cancel Save

2. Initiate a new appointment campaign

- Click the [Campaigns & Events](#)  icon from the navigation menu on the left side of the screen.
- In the [Student Campaigns](#) box, click [Add New](#) under [Appointment Campaigns](#)

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3. Define the appointment campaign parameters

- Under *Campaign Configurations*, enter:

Campaign Name	EX: Fall 2024 Early Outreach Advisor Initials
Instruction Notes for Landing Page	N/A
Care Unit	Advising
Location	Academic Advisement
Service	Early Outreach

- Under *Appointment Configurations*, enter:

Appointment Limit	1
Appointment Length	30 minutes
Slots Per Time	1

- Under *Scheduling Window*, enter:

Start Date	Monday, September 2nd, 2024
End Date	Friday, September 13th, 2024

- Click *Continue*

Appointment Campaign Parameters

Campaign Configurations

Campaign Name *	Instructions or Notes for Landing Page:
<input type="text" value="Fall 2024 Early Outreach Advisor Initials"/>	<input type="text"/>
Care Unit: *	Location: *
<input style="width: 100%;" type="text" value="Outreach Initiatives"/>	<input style="width: 100%;" type="text" value="Academic Advisement"/>
Service: *	
<input style="width: 100%;" type="text" value="Early Outreach"/>	

Appointment Configurations

Appointment Limit: *	Appointment Length: *
<input style="width: 100%;" type="text" value="1"/>	<input style="width: 100%;" type="text" value="30 min"/>
Slots Per Time: *	
<input style="width: 100%;" type="text" value="1"/>	
<input type="checkbox"/> Allow Scheduling Over Courses	
Staff Reminders:	Recipient Reminders:
<input type="checkbox"/> Email <input type="checkbox"/> Text	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> 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 *
<input type="text" value="September 2, 2024"/>	<input type="text" value="September 13, 2024"/>

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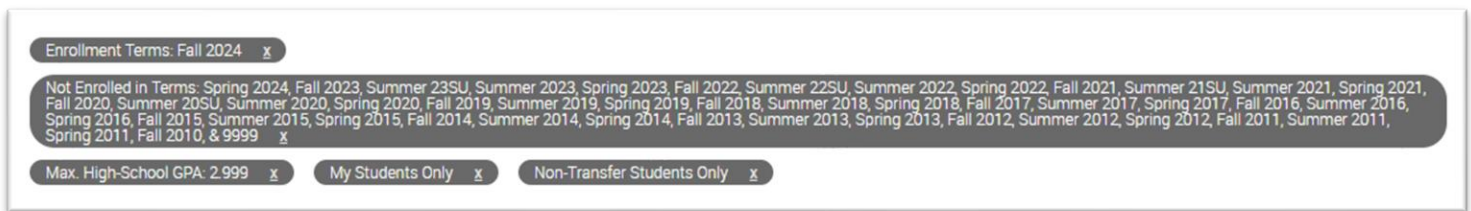
4. Select recipients for (add students to) the campaign

- On the [Add Recipients to Campaign](#) page, input filters:
 - Copy the student E Numbers from the Excel file(s) and paste them into the [Keywords](#) box

New Search



- Click [Search](#).
- Review the search parameters at the top of the returned result page. If needed, click [Modify Search](#) to add, remove, or edit search parameters.
 - Review the returned student list. Select students by clicking the boxes next to individual students' names or by clicking the [ALL](#) checkbox at the top of the list.
 - Click [Continue](#).
 - In the [Review Students In Campaign](#) box, double check the recipient list. To delete students, click the check box next to their name, click [Actions](#) at the top left of the list, and click [Remove Selected Users](#).



- To add more students to the campaign, click [Add More Students](#) at the bottom left of the page.
 - Click [Continue](#)

5. Select staff for the campaign

- The [Select Staff for the Campaign](#) page will list all advisors who have created campaign availability for campaign the [Academic Advisement](#) Location. Select the appropriate advisor(s) by clicking the checkbox next to their name
- Click [Continue](#).

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6. Compose email messages for the campaign

- Under *Nudges*, click [Add Nudge](#).
- On the new page that loads, under *Compose Message* enter:
 - [Subject](#): {\$student_first_name}, Plan for Success with Your Advisor
 - [Message](#): Edit the message based on the [Nudge 1 Draft](#) on the accompanying process document.
 - [Send Date](#): August 23, 2024
- Under *Preview Email*, review the email as it will appear to students. Edit for formatting in the *Compose Message* pane as desired.
- Click [Save Nudge](#).
- Schedule three additional nudges for *August 26*, *September 3*, and *September 9* by clicking [Add Nudge](#). Edit Nudges 2 through 4 based on the nudge drafts on the accompanying process document
- From the *Compose Nudges* page, click [Add Success Message](#)
 - [Subject](#): Thank You for Scheduling with Your Advisor
 - [Message](#): Edit the message based on the [Success Message Draft](#) on the accompanying process document.
 - [Attachment](#): Attach the Success Plan enterable pdf
- Click [Save Success Message](#).

7. Verify and start the campaign

- Review the defined campaign, recipients, staff, scheduled nudges, and success message
- To initiate the campaign (with the first Nudge to be sent on August 23), click [Send](#).