Appointment Campaigns in MavCONNECT

Rev 10-7-2024

General Overview:

Appointment Campaigns allow staff to:

1) send a message and **appointment request** to a group of students and
2) **track** appointment scheduling and engagement (at-a-glance stats!)
3) send **automated 'nudges'** to campaign students who haven't scheduled via the campaign

This guide will show you how to set up an Appointment Campaign and provide best practices for doing so.

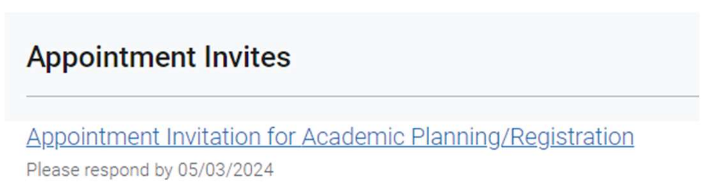
Things to consider before setting up an Appointment Campaign

- What will you name your campaign? Please use the following name convention for CAMPAIGNS – it will help us all keep campaign info tidy. Students will NOT see the Campaign name.
    - Your dept/area (e.g. "AHN"), your last name in parenthesis (e.g. "(Henderson)"), Campaign Short Description (e.g. "First Year Ind Registration Appt.")
    - EX: AHN (Henderson) First Year Advising/Reg Appt
- Who are your target students?
- What is the timeframe of your campaign? (The dates during which your appointment campaign link will be active to students, and the dates during which nudges can be sent.)
- What type of campaign/appointment service would you like to plan for?
    - You can only choose ONE appointment service type per campaign.
- How long do you want the appointments to be?
    - For campaigns, you can choose the Appointment Length you desire – NOTE: it can be *different* than your standard default appointment length settings.
- Have all staff who are to be receiving appointments via the campaign set up the appropriate Availability and Appointment Service, with "Campaign" chosen in the Availability build?
- Who will be launching this campaign? A single staff person can be the campaign creator and will have the ability to add other staff availability to the campaign. You do not need to each launch your own campaigns unless that is desired.

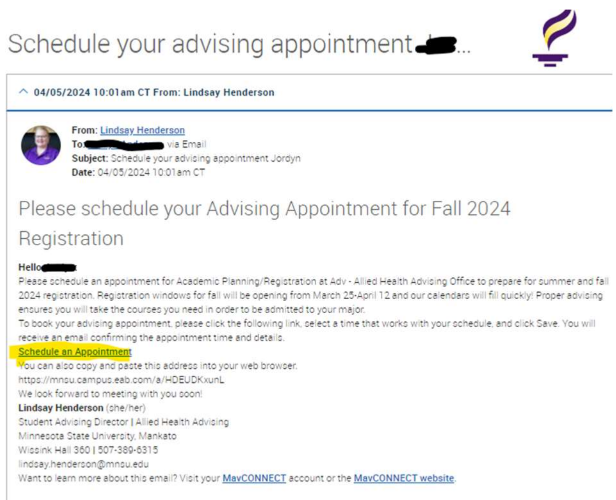
Important things to note before launching a campaign:

- **Appointment Campaign configurations** overwrite **ALL settings at the location level EXCEPT** the *Number of Hours Ahead of Time Students are Allowed to Schedule an Appointment* setting.
    - This means: if your normal default appointment length is 45 minutes (as configured by MavCONNECT staff in the back-end), but you put in 30 minutes as the appointment length in your Appointment Campaign configurations, students will set up appointments for 30 minute durations *if* scheduling via the campaign. If they happen to schedule with you via the standard student scheduler they will be scheduled via the normal default appointment length.
- **Appointment Campaign configurations also** overwrite **the "slots per time" configurations you set at the Availability creation level**. This will mostly impact those who use Group Appts, and have varying number of slots depending on the location of the group appt. Some items are issued below. See us with additional questions at mavconnect@mnsu.edu, ext. 1548.
    - **Always start with the MAXIMUM amount of campaign slots you can accommodate for ALL sessions and meeting modes.** Changing/increasing campaign slot numbers *after* campaign launch is not easily done and requires cancellation of existing appointments to get the increased number of slots to show up to students.

  - **If you are offering both in-person and virtual modes for your group appts via your campaign, you will need to list lowest capacity number for all modes.** This can be challenging if you have zoom sessions that can accommodate 100 or more students but also have a physical location which can only accommodate 35, e.g. In this case, you need to limit the slots to 35 in your *campaign* build. If you use the higher slot number, you may get more students than you can accommodate at your in-person session(s).
- **Availability** *may* be built to allow for scheduling both via a campaign link ("Campaign" in the Availability build) or via the student scheduler ("Appointment" option in the Availability build). Choosing BOTH the "Campaign" and "Appointment" options when creating availability works very well for individual appointments. However, this is NOT a good choice for Group Appointments as the first student to grab a slot will determine if the rest of the group must schedule via the campaign link or student scheduler (i.e if a student first schedules into a group appointment via Student Scheduler, then the campaign link will show as not available for that time and visa-versa.)
  - **THEREFORE: For Group Appointments you plan to use for a CAMPAIGN – build separate availability ONLY for your campaign use (i.e. do NOT mark "Appointment" in your availability build.)**
- There is an option to "Allow Scheduling Over Courses". This applies to *Instructors*. In most cases it would NOT be appropriate to check this box, unless you are an instructor connected to multiple lab classes on campus but are not actually teaching at those times. Then, you may want to check this box so that students can schedule at the same time as your courses, but beware, this applies to all courses.
- **Scheduling Links are specific to the Appointment Campaign and to each student (each student will get a unique link)**. As such, scheduling links should not be shared among students! To help aid students in scheduling, the scheduling links ***will allow a student to schedule without logging in***, so if you or they share a link, an appointment will be scheduled under the original student's account.
- **Staff Scheduling an Appointment sent via a campaign** – If a student walks in or calls your office wanting to schedule into a campaign appointment, the easiest way to schedule the student:
  - Have the student log into their **MavMail** and click on the link in the email they received or they can log into **MavCONNECT** and Schedule via the campaign link under the "Appointment" section in MavCONNECT (Appointment Invite – see screenshot)



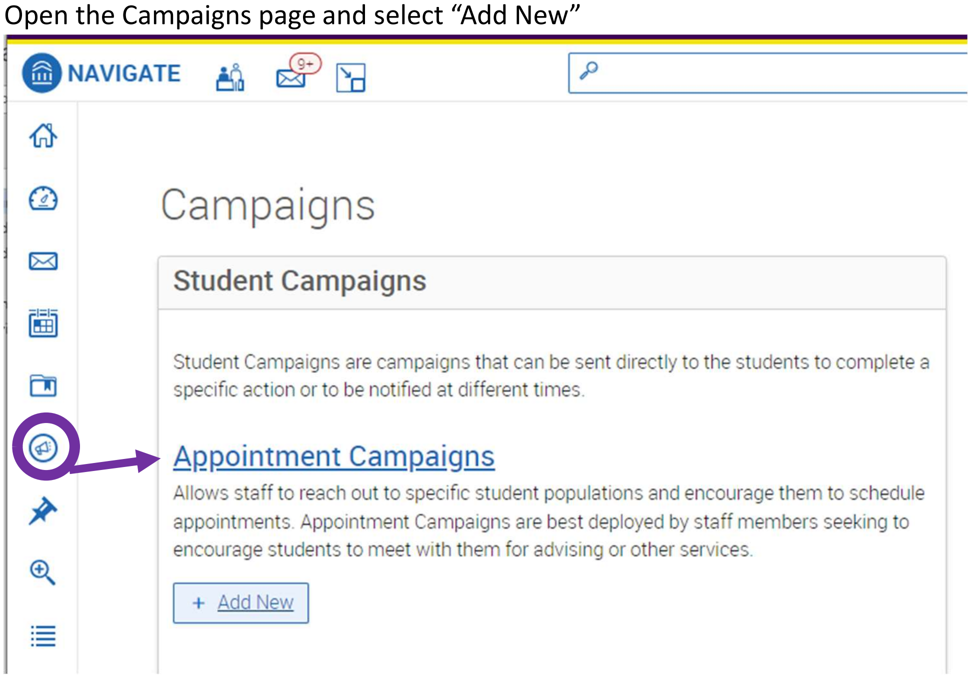
  - Look up the student's profile in MavCONNECT, go to "More", "Conversations" (***you may need to clear the filters to see the email***!), and find the Appointment Campaign email and schedule from that link. It will work for anyone who clicks it but will be attached to the student it was sent to. (NOTE: Student Employees/Front Desk workers may NOT have access to the conversation tab of a student's profile and may need to schedule the student via the standard "Schedule an Appointment" option from the Student's profile, per normal.)



  - Staff and Student Employees can schedule from a Student's Profile page per normal (Find student, click "Schedule an Appointment" but it's trickier to do with appointment services set aside only for campaigns/group appts.) It is easier to find the active appointment campaign link and schedule it that way OR talk through it with the students and have them do it.
- If a student "**No Shows**" an appointment made via a campaign link, the **Link will open back up** so you can instruct the student to reschedule via the link. This link will NOT automatically be sent upon the 'No Show" marking, but students would fall into the 'receive a nudge' group if there are still nudges scheduled to go out.
- Once you have launched your campaign, you will be able to return to it to easily see who has / has not yet scheduled and so on. You can also adjust other campaign items like nudges, etc.
  - It is NOT a good idea to increase Slot Numbers after launch as the additional seats will NOT be available to students unless you cancel all existing appointments made.
- You will also be able to **associate** "**eligible appointments**" with the campaign, even if they were made outside of the campaign via the "Eligible Appointments" tab. This can help with metrics. This applies mostly to individual appointments and NOT group appointments.

Launch an Appointment Campaign

1. Open the Campaigns page and select "Add New"



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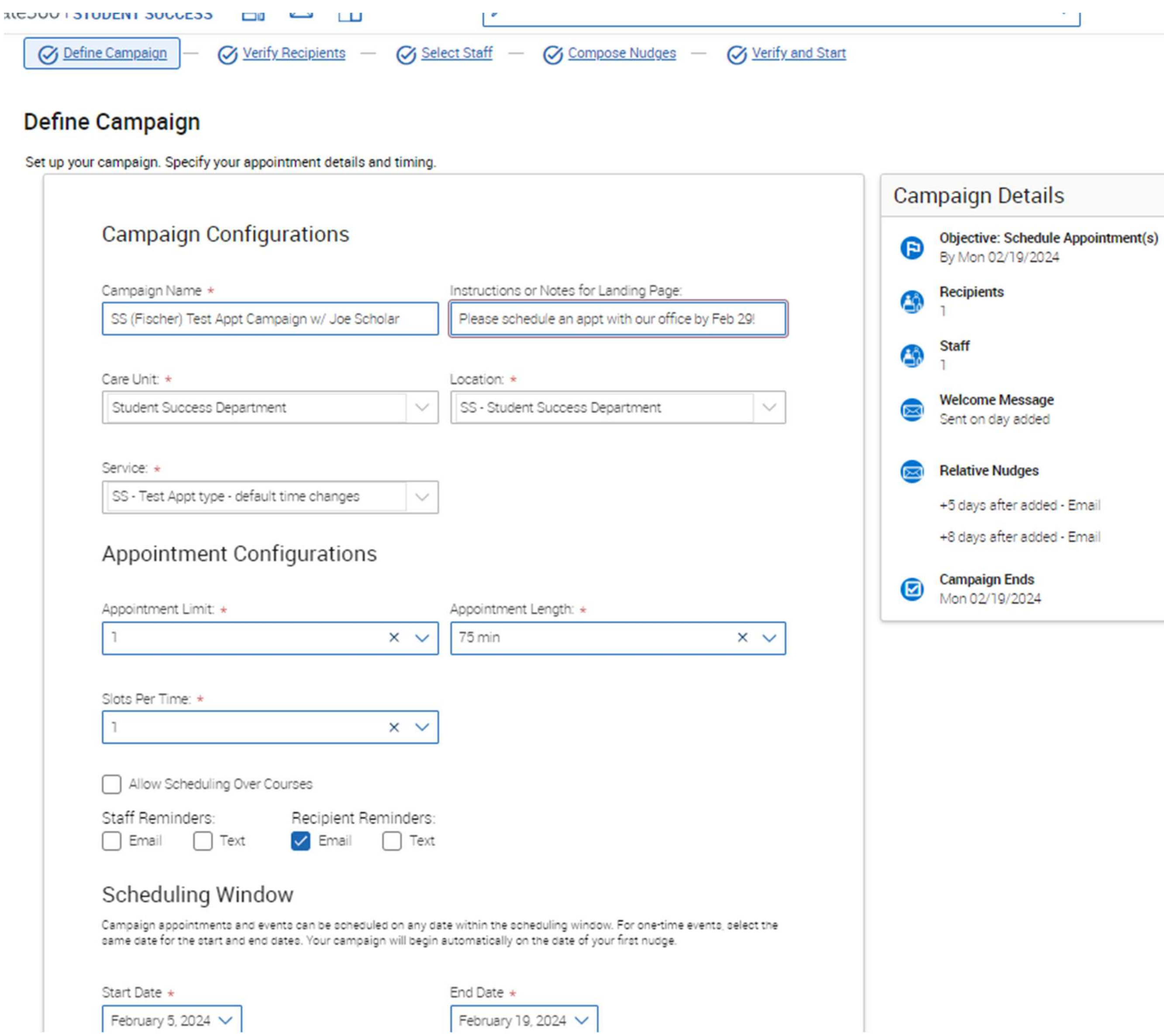
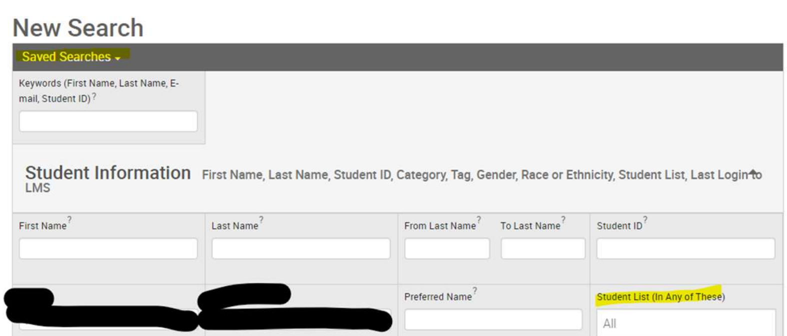
2. Set the **criteria** for the Appointment campaign then click continue.
    a. **Campaign Name**: Visible to person creating the campaign and others who have access to view. Not visible to students.
        i. NOTE: **Start the Campaign Name with your Dept/Area and then your last name in parenthesis**. E.g. AHN (Henderson) and then a short description. Add'l items could include: Term, Population, Purpose; Term, Population, College, Purpose; Term, College, Purpose, Last name of user who created the campaign. **Examples** include: "AHN (Henderson) SPR24 Freshmen Reg Campaign", "COB (Meidl) F25 1st Time Freshmen Business 15-to-finish", or "CSET (Adams) SPR24 Freshmen Bio Major Decl, J. Smith"
    b. **Instructions/Notes for Landing page**: The instructions for students when they open the campaign link.
    c. **Care Unit**: Your home Care Unit
    d. **Location**: Your MavCONNECT Location
    e. **Service**: Choose the Appointment Service (reason) you want associated with this campaign. I.e. the appointment reason students will sign up for. Only one Appointment Service can be chosen for a campaign.
    f. **Course or Reason**: This option will only show up for those Appointment Services which have a course attached to them, such as BUS 295 Advising Appt
    g. **Appointment Limit**: How many appointments you want students to schedule for this appointment service during this campaign. In most cases, this will likely be 1 appointment.
    h. **Appointment Length**: How long the campaign appointment will be. Multiple durations available. This appt length will OVERWRITE the default appointment time length designated via the location configurations (determined by you and managed by the application administrators)
        i. Faculty / Instructors: Your appointment service options have time lengths built into the appt name, so please be sure to choose the appt length here which matches your appt service name.
    i. **Slots per Time**: Appointments can be individual or group. By adding more than one 'slot per time' you can have a group appointment. Max number is 500.
    j. **Campaign Reminders**: Please choose email. Texting is not currently an option.
    k. **Scheduling Window**: The dates when campaign appointments can be scheduled. Your campaign officially begins on the date of your first nudge.
    l. **HIT CONTINUE**



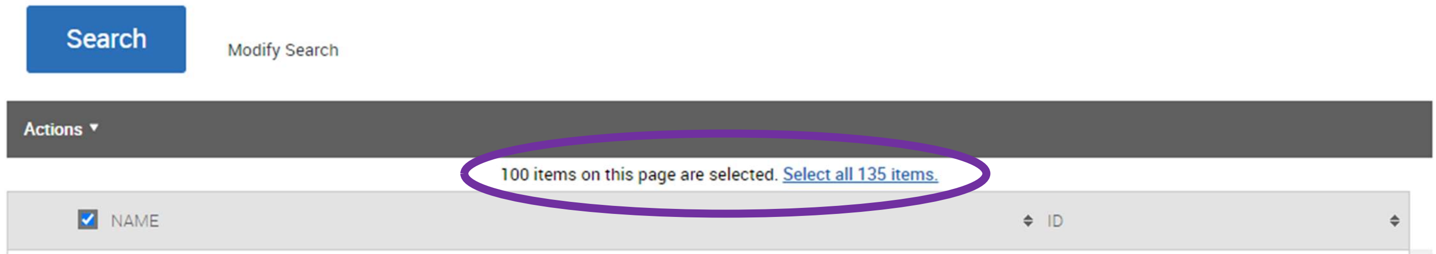
Adding students to the Appointment Campaign

3. **Search** to find recipients for the campaign. You can use the **advanced search** to find specific populations of students, you can search by "Assigned To", or you can use a pre-defined saved *Student List* or *Saved Search* (under the "Student Information Area") (Automation options in this area are coming.)

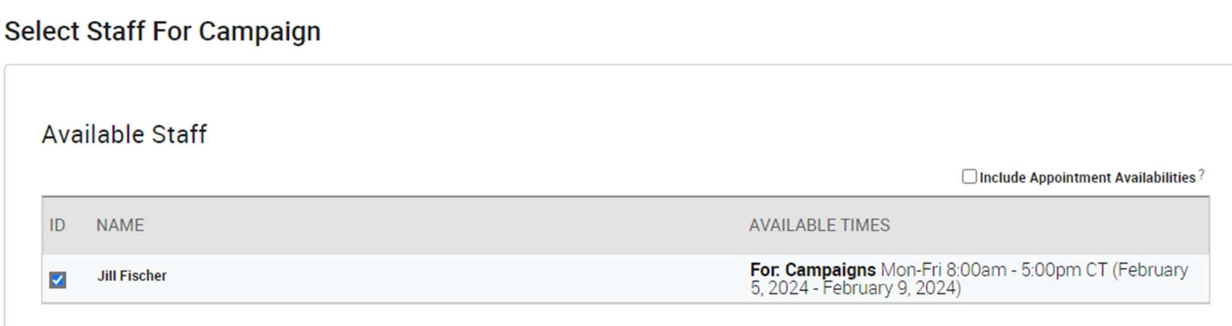


   a. Once you have entered in your search criteria, click on **search** to populate a list of students.
   b. If you would like to send to all students, select the checkbox at the top next to name, this pops up a message that allows you to select all students (circled below).

4. Once you have selected the recipients, click on continue. You can also REMOVE students from this campaign at this point.



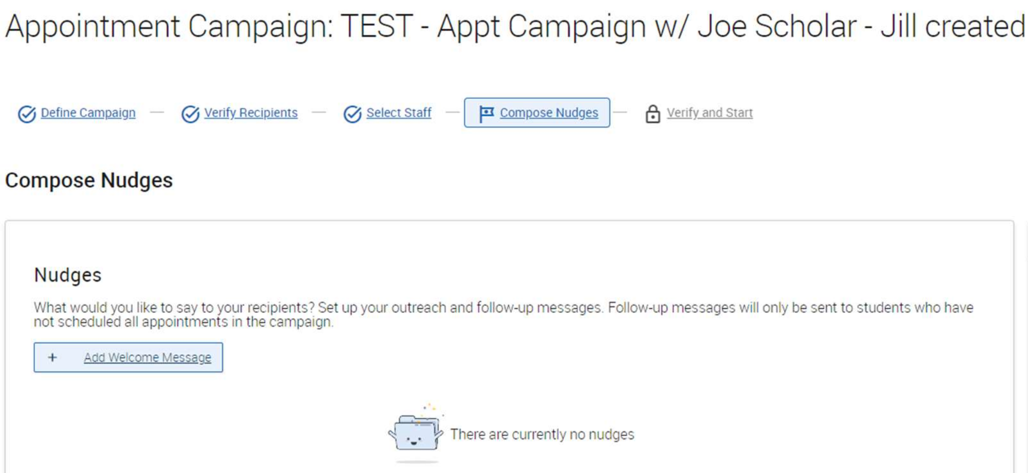
5. Select Staff for the Campaign menu. Once finished, click "Continue".
    a. Staff members who have availability built using the Appointment Service you chose in the first section of this campaign build will be shown here. Staff MUST HAVE CHOSEN "Campaign" as an option when building their availability. Ensure that all necessary staff member have built their availability before you build/send the campaign. (You may also choose to add availability build only for APPTS, but this is NOT advised for Group Appts).
    b. NOTE that for any staff members you an appointment campaign, their names WILL BE VISIBLE/SORTABLE to students. The campaign settings override the default setting we have in the back end. This is not changeable at this time.



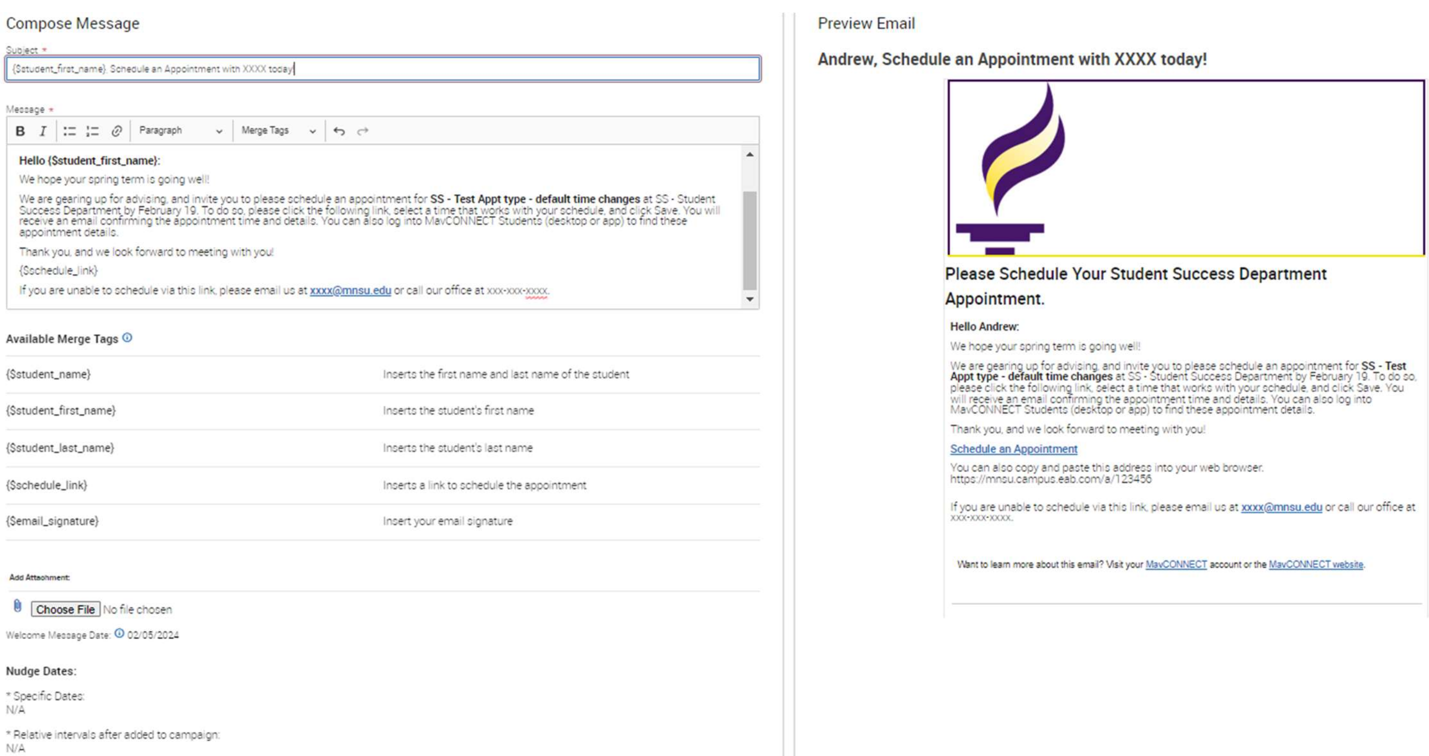
Add Welcome Message, Nudges, and Success Message

- Nudges allow for more communication from you to students during an Appointment Campaign.
- Each nudge is an email sent from within MavCONNECT to your campaign list.
- Welcome messages send immediately after starting the campaign.
- Other nudge messages are sent the morning of the date chosen when you create the nudge. Some may be slightly delayed, as with any large transmission.

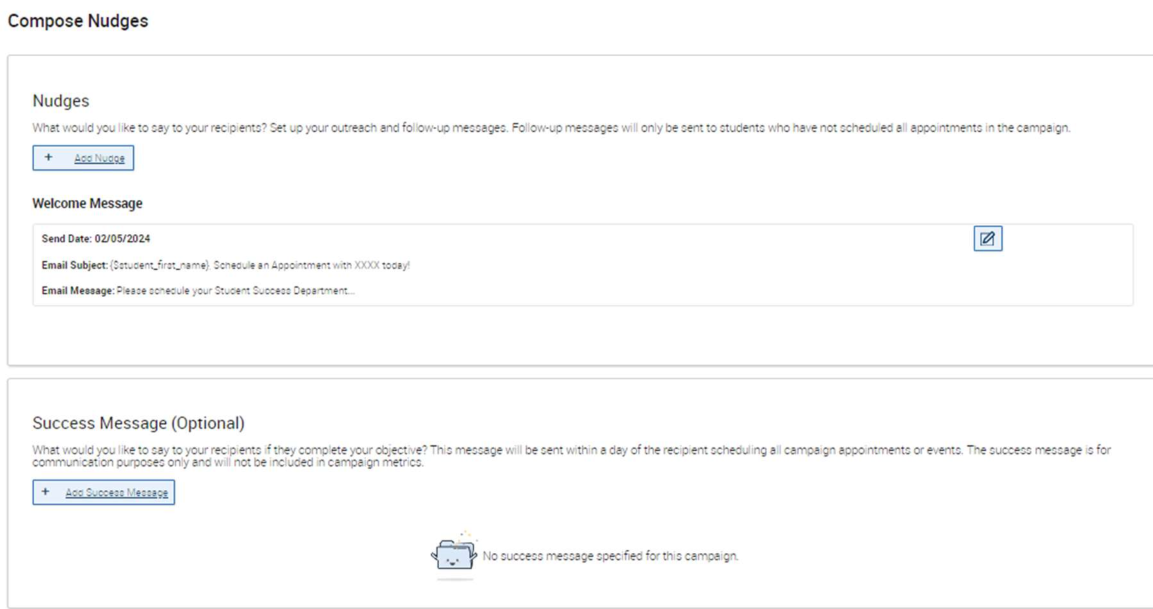
6. Click on “Add Nudge” to create your first nudge / Welcome Message.
    - **a.** Note: You must create at least one nudge per campaign; however, you can create more.
    - **b.** You can add an attachment if you like (see bottom of screen)
    - **c.** Preview your message – there you will see your “Schedule an Appointment” link which will pull in the calendars of the staff members you chose in an earlier step, who must have availability for the Appointment Service you chose.



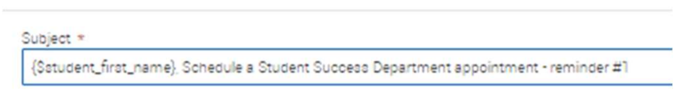
7. For emails, create a subject line and customize the message. A preview of the message shows to the right.



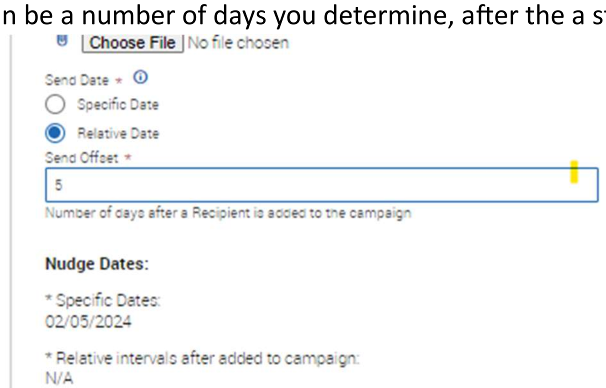
8. After you create the nudge message, click on “Save Welcome Message” to continue.
    - a. You can add additional nudges after this step to send reminders to the students who have NOT yet made their appointments.
    - b. Don’t forget to add a “Success Message” if desired!



c. You may want to change up the Subject Line, or add "Reminder" etc. Up to you!



d. When building a nudge you will also choose the date you want to send it. It can be a specific date, or it can be a number of days you determine, after the a student is added to the campaign.



e. Then hit **SAVE Nudge**
f. **Repeat** adding nudges as you wish.
g. **Add a success message** if desired.
h. **Hit CONTINUE**

Confirm and Send

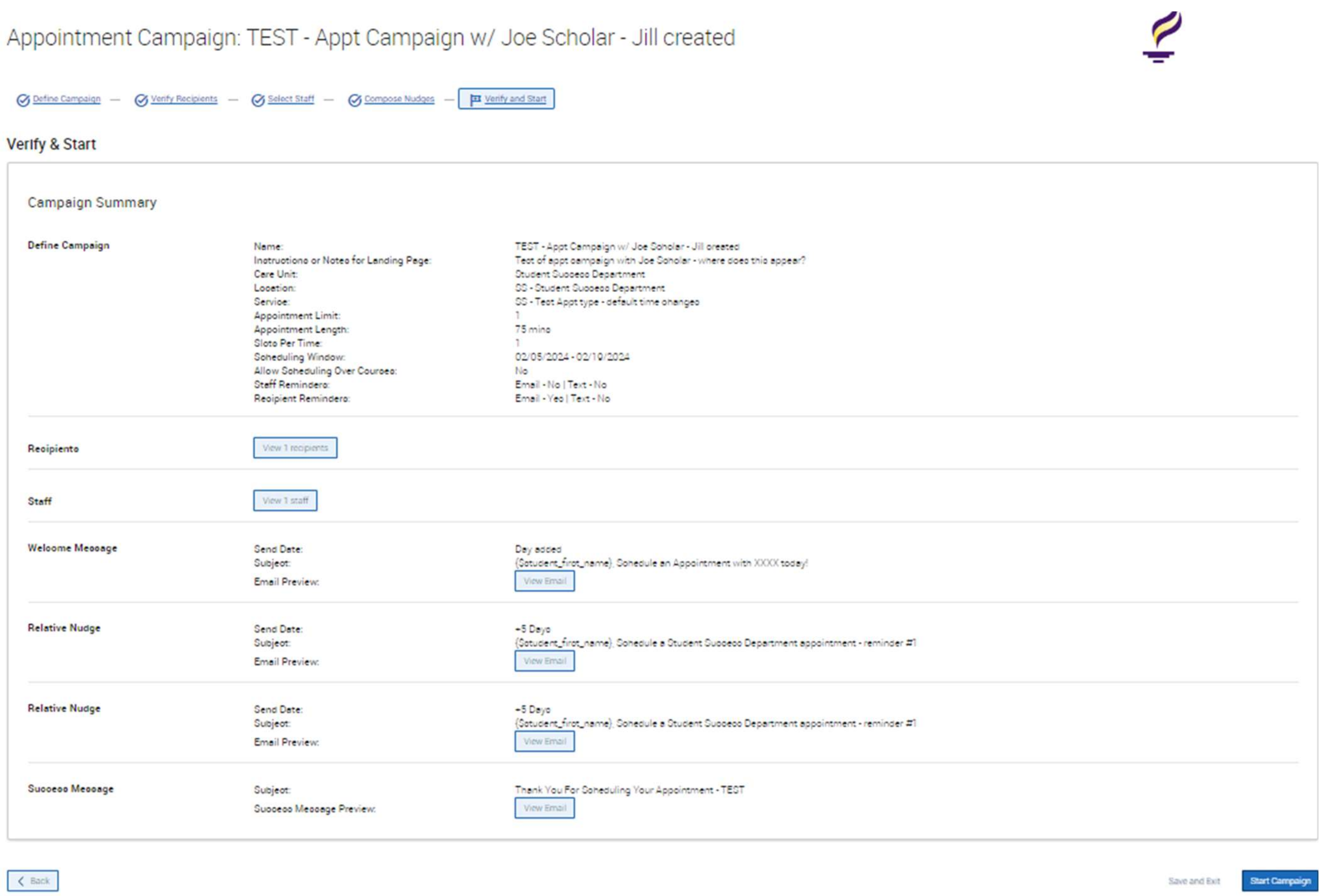
9. After you have saved your welcome message, nudges, and success message, **review your campaign details, nudges, and recipients**. Once you have confirmed all, click on "Start Campaign" to send the emails to the students.
    a. If you are sending same day, the messages will be begin to send after clicking "Start Campaign"
    b. If your campaign begins the next day or after setting it up, the nudge will send after 10AM on that date.
    c. Your campaign ends when the last message is sent.
    d. Moving forward, you are able to add students to the campaign, and you will get an option to send the previous 'nudge' immediately to the new students. This will NOT be listed as a welcome message,

however, it will show as another nudge. Our vender is working on this as it impacts welcome message metrics. Students will also get future nudges as well.

e. Also – if you have a student who makes an appointment you are trying to track *outside* of the campaign link, you can choose to associate those appointments with the campaign, which may be of help to your tracking/metrics.

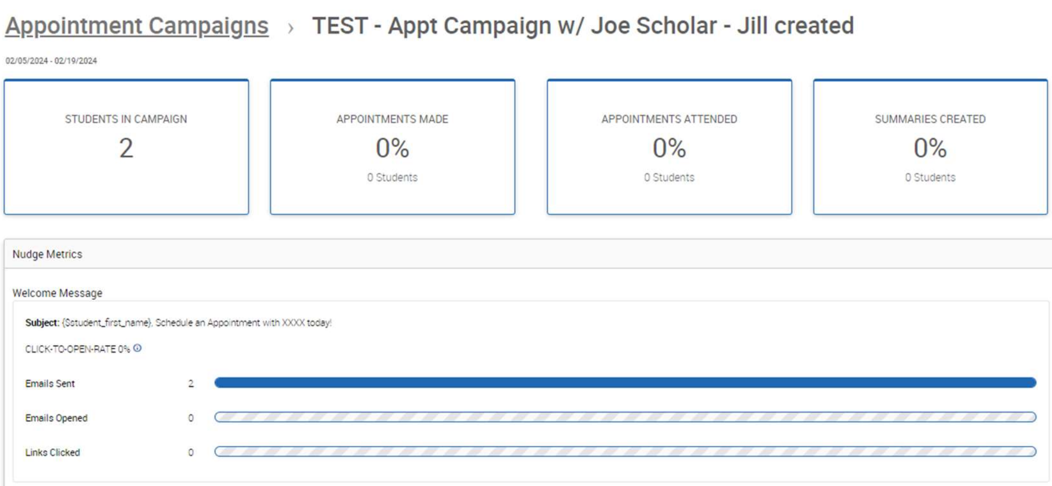
f. Finally, any 'no shows' who scheduled via the campaign but then are marked as 'no shows' will send that student's name back into the nudge queue (if your appointment limit is set to 1).

g. Students who WITHDRAW from the University remain connected to any campaign they were originally a part of, and will remain on your nudge tabs if they hadn't scheduled an appt via the campaign. You may REMOVE these students from the campaign and future nudges by following the instructions at the end. While students who have withdrawn will not be impacted by the nudges themselves, your metrics for the campaign will be. Removing them is a good practice but not a requirement.



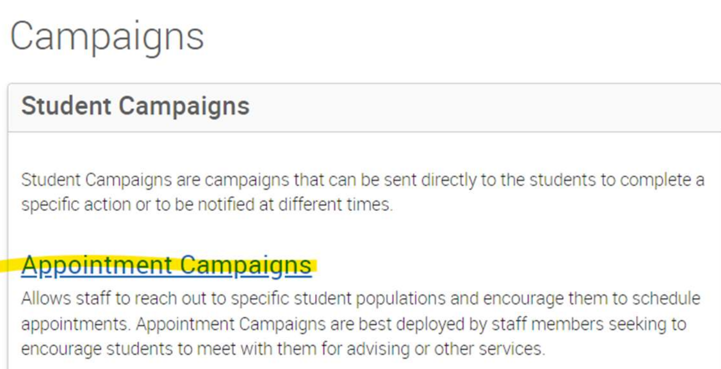
Reviewing your campaign – metrics!

Once your campaign has been completed, you can go back to the "Appointment Campaigns" and open up your campaign. This page will open a report with statistics about the performance of your campaign.

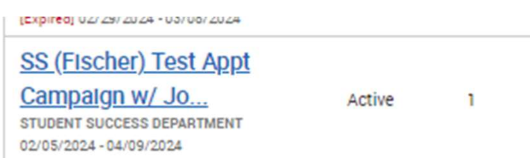


REMOVING a student from a campaign

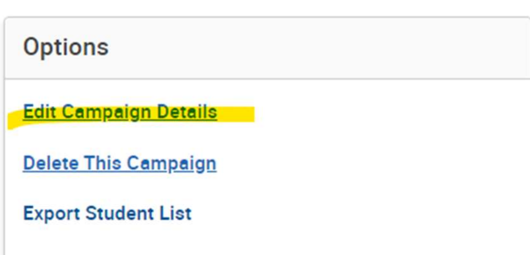
Go to your Campaigns page by clicking on the Campaign icon and then on “Appointment Campaigns”



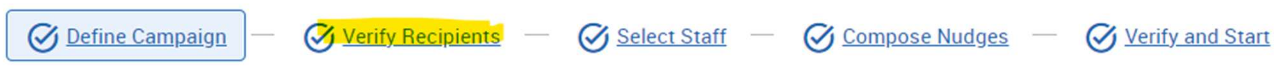
Once there, click on the campaign you want to remove students from:



Then click on “Edit Campaign Details”



And then click on “Verify Recipients”



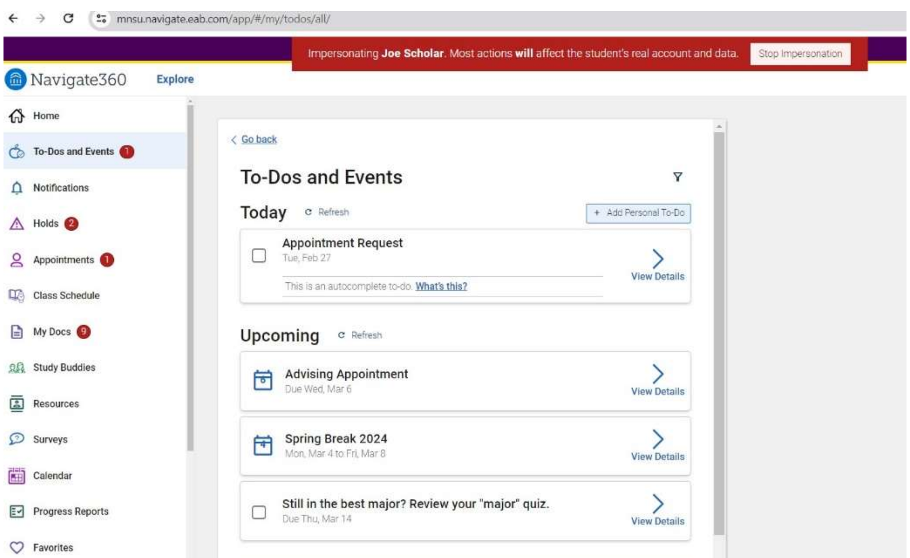
From here, check the square in front of the student you want to remove, and then under “Actions” select *Remove Selected Users.* This should remove the student from your list.

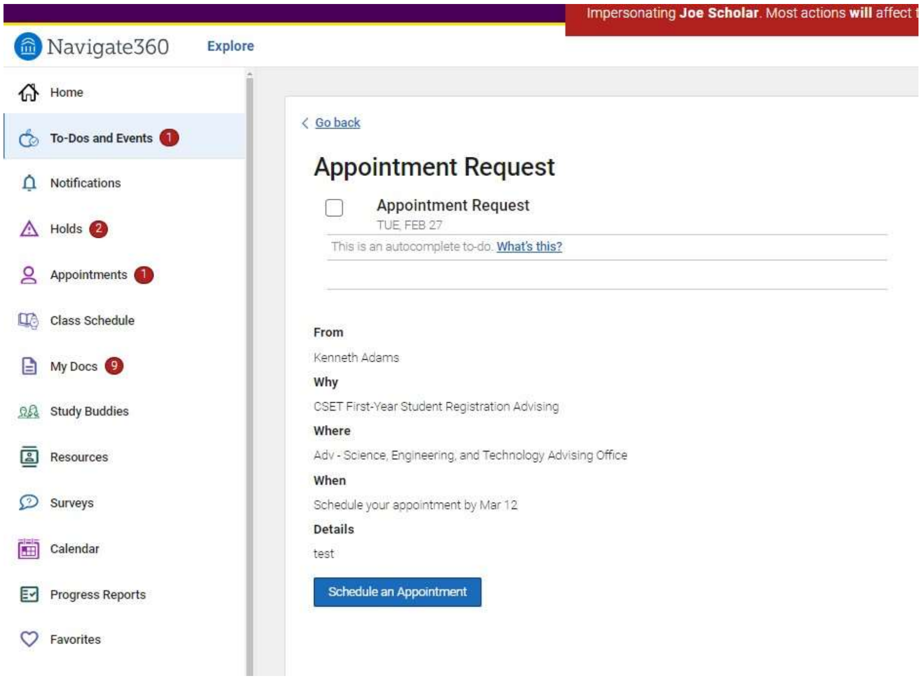
Click on **Continue** if you need to make additional changes or adjust the nudges (or if you have ADDED new students to this campaign). Click on **Save & Exit** if you are only removing students from this campaign.

STUDENT VIEW of an APPOINTMENT CAMPAIGN

Students will receive an **email** (texting not currently available) when an appointment campaign is launched (welcome message) and emails of any nudges. From *staff MavCONNECT view*, per normal, emails are viewed under a student’s profile, under “More”, “Conversations”. (Remember to CLEAR the filters so that you see all the emails a student has been sent by the system.)

From a **student view**, in addition to the email they received, students will see **TO DO item in MavCONNECT Student**:

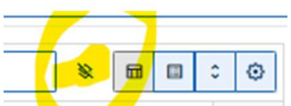




The TO DO should disappear from a student's MavCONNECT to do area once they have an appointment scheduled.

REMINDER RE: STUDENT MESSAGES & MavCONNECT

- Emails sent via an appointment campaign ARE viewable in a student's profile under the "More", "Conversations" area – you may need to **CLEAR THE FILTERS** to see them all.



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- Student Messages ARE tracked in MavCONNECT, so please be aware that others will be able to see the conversation. IF students respond with sensitive information and it is tracking in MavCONNECT please email mavconnect@mnsu.edu to discuss removal of individual student conversations.
- If you do need to stop tracking, in follow up email responses, you will need to delete the MavCONNECT email address for the student.
    - In the "To" field, the email will show as Joe.scholar@mavconnect.mnsu.edu delete this and input the student's normal MNSU-Mankato email: Joe.scholar@mnsu.edu
    - This will stop message tracking in MavCONNECT.

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