Appointment Campaigns in MavCONNECT

Rev 4-10-2024

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 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 override 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. See us with questions, mavconnect@mnsu.edu, ext. 1548.
- **Availability** may be built to allow for scheduling via a campaign link or via the student scheduler. 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.)
  - For Group Appt – build separate availability ONLY for your campaign use.

- 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 <u>are specific</u> to the Appointment Campaign and to each student (each student will get a unique link)**. As such, scheduling links should not be shared! 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)
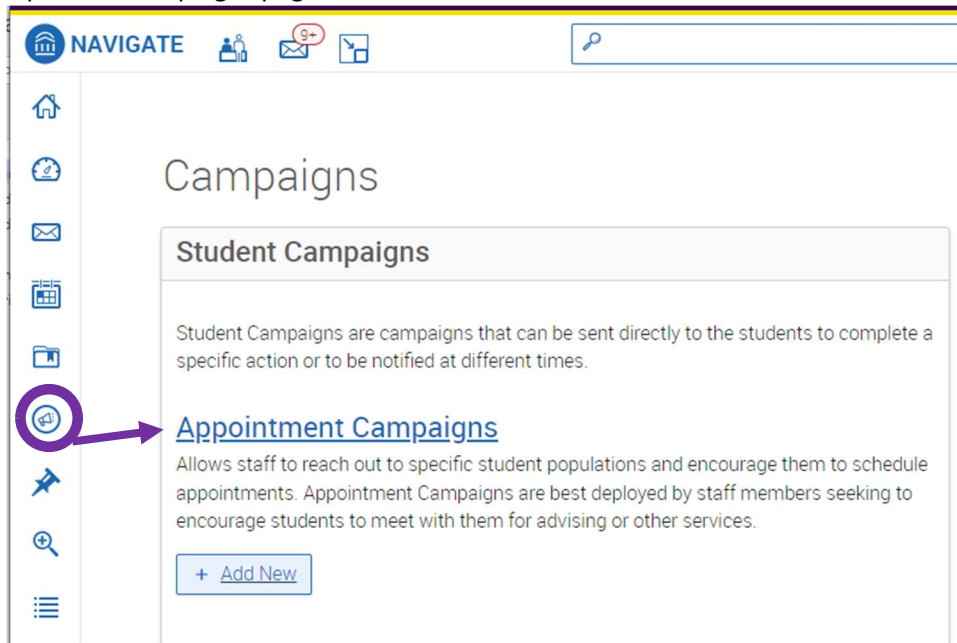

    Appointment Invites

    Appointment Invitation for Academic Planning/Registration
    Please respond by 05/03/2024
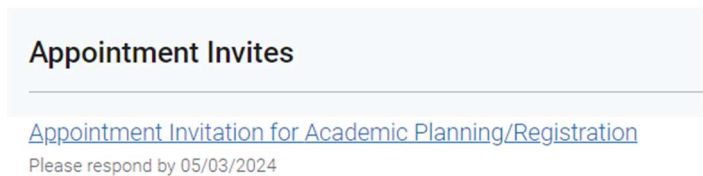
  - Look up the student's profile in MavCONNECT, go to "More", "Conversations" (you may need to clear the filters to see the email!), and find the Appointment Campaign email and schedule from that link. It will work for anyone who clicks it but will be attached to the student it was sent to.
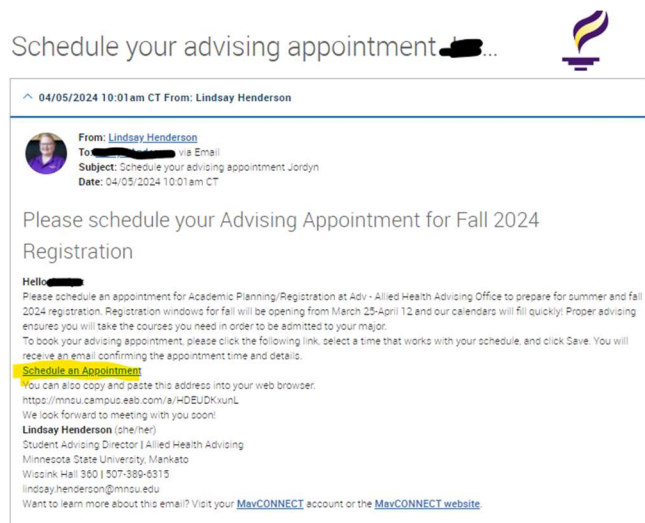
  - Staff can schedule from a Student's Profile page per normal (Find student, click "Schedule an Appointment" but it's trickier to do with appointment services set aside only for campaigns/group appts.) It is easier to find the active appointment campaign link and schedule it that way OR talk through 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.
- 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.

Launch an Appointment Campaign

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

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**

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

Define Campaign

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

Campaign Configurations

Campaign Name *
> SS (Fischer) Test Appt Campaign w/ Joe Scholar

Instructions or Notes for Landing Page:
> Please schedule an appt with our office by Feb 29!

Care Unit: *
> Student Success Department

Location: *
> SS - Student Success Department

Service: *
> SS - Test Appt type - default time changes

Appointment Configurations

Appointment Limit: *
> 1

Appointment Length: *
> 75 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 *
> February 5, 2024

End Date *
> February 19, 2024

Campaign Details

🏁 Objective: Schedule Appointm
By Mon 02/19/2024

👥 Recipients
1

👥 Staff
1

✉ Welcome Message
Sent on day added

✉ Relative Nudges
+5 days after added - Email
+8 days after added - Email

☑ Campaign Ends
Mon 02/19/2024

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.)

New Search

Saved Searches ▾

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

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List, Last Login to LMS

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

		Preferred Name?		Student List (In Any of These)
				All

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.

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.

Appointment Campaign: TEST - Appt Campaign w/ Joe Scholar - Jill created

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

Compose Nudges

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 Welcome Message]

There are currently no nudges

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

Compose Message

Subject: *
{$Student_first_name}, Schedule an Appointment with XXXX today!

Message: *

Hello {$Student_first_name}:

We hope your spring term is going well!

We are gearing up for advising, and invite you to please schedule an appointment for **SS - Test Appt type - default time changes** at SS - Student Success Department by February 19. 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. You can also log into MavCONNECT Students (desktop or app) to find these appointment details.

Thank you, and we look forward to meeting with you!

{$Schedule_link}

If you are unable to schedule via this link, please email us at xxxx@mnsu.edu or call our office at xxx-xxx-xxxx.

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:

[Choose File] No file chosen

Welcome Message Date: ⓘ 02/05/2024

Nudge Dates:

* Specific Dates:
N/A

* Relative intervals after added to campaign:
N/A

Preview Email

Andrew, Schedule an Appointment with XXXX today!

Please Schedule Your Student Success Department Appointment.

Hello Andrew:

We hope your spring term is going well!

We are gearing up for advising, and invite you to please schedule an appointment for **SS - Test Appt type - default time changes** at SS - Student Success Department by February 19. 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. You can also log into MavCONNECT Students (desktop or app) to find these appointment details.

Thank you, and we look forward to meeting with you!

Schedule an Appointment

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

If you are unable to schedule via this link, please email us at xxxx@mnsu.edu or call our office at xxx-xxx-xxxx.

Want to learn more about this email? Visit your MavCONNECT account or the MavCONNECT website.

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!

Compose Nudges

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: 02/05/2024

Email Subject: {$student_first_name}, Schedule an Appointment with XXXX today!

Email Message: Please schedule your Student Success Department...

Success Message (Optional)
What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipient scheduling all campaign appointments or events. The success message is for communication purposes only and will not be included in campaign metrics.

+ Add Success Message

No success message specified for this campaign.

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

Subject *

{$student_first_name}, Schedule a Student Success Department appointment - reminder #1

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.

Choose File | No file chosen

Send Date * ⓘ
○ Specific Date
● Relative Date
Send Offset *
5
Number of days after a Recipient is added to the campaign

Nudge Dates:

* Specific Dates:
02/05/2024

* Relative intervals after added to campaign:
N/A

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.

02/05/2024 - 02/19/2024

STUDENTS IN CAMPAIGN	APPOINTMENTS MADE	APPOINTMENTS ATTENDED	SUMMARIES CREATED
2	0%	0%	0%
	0 Students	0 Students	0 Students

Nudge Metrics

Welcome Message

Subject: {$student_first_name}. Schedule an Appointment with XXXX today!

CLICK-TO-OPEN-RATE 0% ⓘ

Emails Sent	2	▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬
Emails Opened	0	░░░░░░░░░░░░░░░░░░░░░░░
Links Clicked	0	░░░░░░░░░░░░░░░░░░░░░░░

REMOVING a student from a campaign

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

Campaigns

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

Allows staff to 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.

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

[Expired] 02/29/2024 - 03/06/2024

SS (Fischer) Test Appt Campaign w/ Jo...   Active   1
STUDENT SUCCESS DEPARTMENT
02/05/2024 - 04/09/2024

Then click on "Edit Campaign Details"

Options

Edit Campaign Details

Delete This Campaign

**Export Student List**

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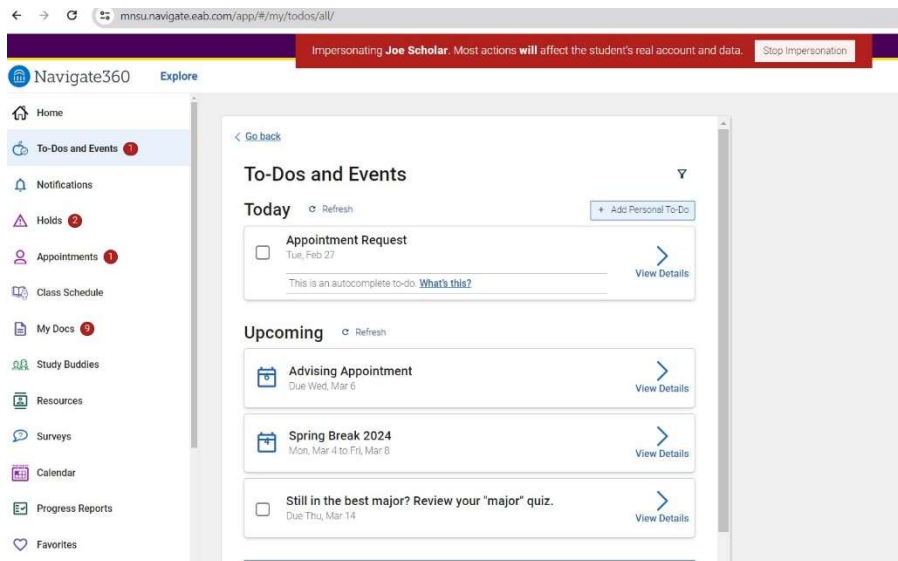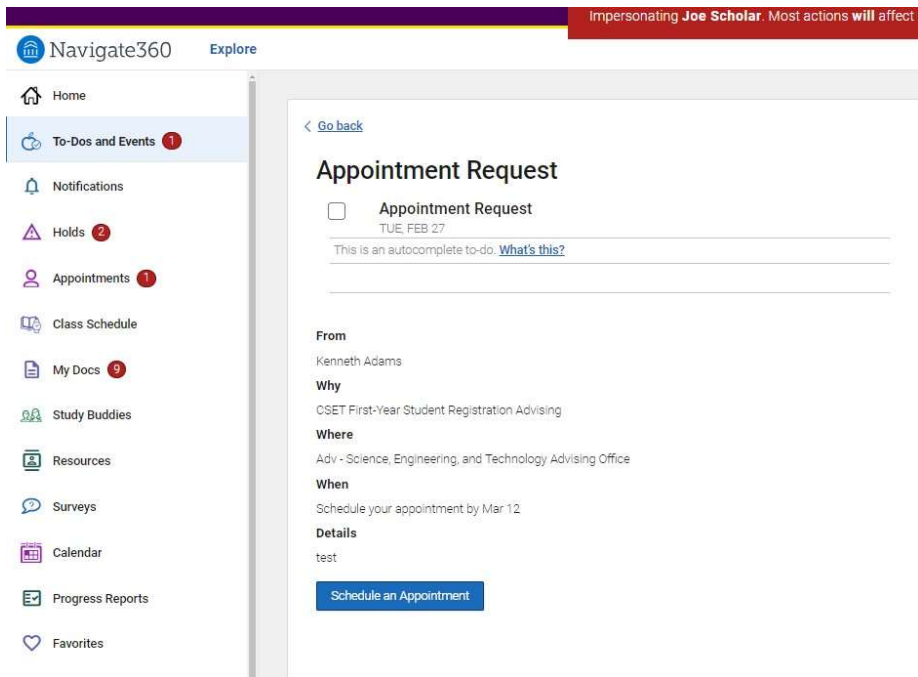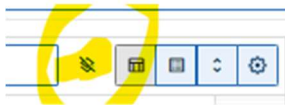
The TO DO should disappear from a student's MavCONNECT to do area once they have an appointment scheduled.

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.

    o
- 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.
    - o 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
    - o This will stop message tracking in MavCONNECT.