# MONTANATECH

## EAB Navigate Appointment Campaign Worksheet

Appointment campaigns are one tool staff can use to reach out to specific student populations and encourage them to schedule appointments. In order for Appointment Campaigns to work successfully, you must have both **calendar sync** and **availability** set up.

1. Open Campaigns using the bullhorn 📢 icon in the left navigation menu
2. Create a new Appointment Campaign by clicking the "+ Add New" button ➕ Add New
3. Use the following parameters to Define your Campaign

- Campaign Configurations
  - Campaign Name: {Current Term}|{Description}|{Office/College/Major}|{Campaign Creator}  Ex: Sp22|Summer/Fall Registration | Business | T.Tregidga
  - Care Unit: Your care unit. Ex: Faculty, Professional Advising, etc.
  - Location: Your location. Ex: ACE, Highlands Campus, etc.
  - Service: Your campaign appointment type. Ex: Class Registration, 20th Day Advising, etc.
- Appointment Configurations
  - Appointment Limit: 1 (unless you are hoping that students schedule more than one meeting)
  - Appointment Length: 30 minutes is typical, depending on appointment can be 60 minutes
  - Slots per time: 1 (unless this is a group advising campaign)
  - Choose whether you want students to be able to allow scheduling over courses, if you want you and/or your students to receive appointment reminders via email and/or text
- Scheduling Window
  - Start and End Date: choose what is appropriate for your campaign

4. Add Recipients to Campaign
   - You may choose to add all of your assigned students, or depending on your campaign, you can use the Search section to add a specific group of students for outreach
   - For ideas or inspiration on different campaigns to run, check out https://eab.com/technology/infographic/student-success/61-campaign-ideas/
   - Hit the Search button and select the students from your list to add them to your campaign
   - Review your student list and remove any who you would like to exclude from the campaign
5. Select Staff
   - This will typically just be yourself, but if you approve of students meeting with other advisors in your care unit/location, then add that advisor as well
6. Compose Nudges
   - Your first nudge will be sent on the day your campaign begins, and you can set up follow-up messages to be sent to students who have not scheduled an appointment
   - Be clear in your message as to why you are contacting the student and the "call to action", and consider sending "asset based" messages (see checklist below)
   - Do not remove the "schedule link" but outside of the bracketed fields, you can change the langue to reflect your communication style (don't forget to update the subject line as well)
   - Check out the "Available Merge Tags" to see how you can personalize the message

- Preview the email and the landing page that students will see when they click the "Schedule an Appointment" link
- Save the nudge, and add more to follow up with students at regular intervals
- Add a success message to send to students once they schedule their campaign appointment. You may share any necessary information for your appointment in this message

7. Verify and Start your Campaign!

## Tool: Asset-Based Checklist

We built this checklist as a tool for you to assess your current email strategy. Use it to ensure your message matches the intention of your efforts.

| | Quick Check Items | Ask Yourself | ✔ |
|---|---|---|---|
| | **Creating inclusive and asset-based emails** | | |
| 1 | Send a personalized message | Did I use the student's first name? | ☐ |
| | | Did I use the student's preferred pronouns, if known? | ☐ |
| | | Did I introduce myself, if I haven't met the student yet? | ☐ |
| | | Did I state the reason for my outreach? | ☐ |
| 2 | Send emails from someone known to the student | Did I make sure the sender of the email is someone the student trusts or at least knows? | ☐ |
| 3 | Normalize challenges | Did I provide quantitative or anecdotal evidence to demonstrate that other students face the obstacle I'm reaching out about? | ☐ |
| 4 | Use asset-based language | Did I acknowledge the student's potential to succeed? | ☐ |
| | | Did I focus on the student's strengths and/or encourage their aspirations? | ☐ |
| | **Email communication best practices** | | |
| 5 | Keep your message clear and concise | Did I keep my email approximately at the seventh-grade reading level? | ☐ |
| | | Did I avoid jargon? | ☐ |
| 6 | Provide a direct follow-up link | Did I provide a direct path to appointment scheduling, a campus chatbot, or a direct-dial phone number? | ☐ |

*Use notes from the raised alert in your student success management system.*

*Advisors and faculty are the most trusted and ideal senders. Other potential senders are campus partners who work directly with specific student groups.*

*Use the Gunning Fog Index or another readability test to assess the reading level required for your email.*

**TIP: Get student feedback on what works—and what doesn't**

Your student email communication strategy should be an iterative process, especially as the impact of the message will be felt differently across student groups. To ensure you consider students' perspectives as you plan your strategy, invite student leaders or student focus groups to participate in the planning process (and compensate them for their time).

If you have questions or concerns, or would like someone to walk through creating a campaign with you, don't hesitate to reach out to Sarah - snorthwolfe@mtech.edu