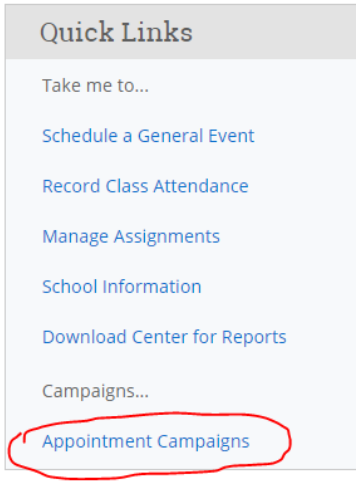
Running Targeted Campaigns

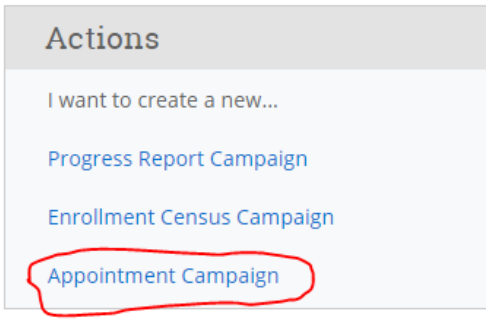
An Appointment Campaign allows faculty and staff to reach out to specific populations of students to encourage them to schedule appointments. This functionality is commonly used when you have identified a population of students in need of additional support and you are sending them a request to schedule an appointment with you. Program Planning is a perfect time to run a campaign.

Launching an Appointment Campaign

To begin, click Appointment Campaigns in the Actions or Quick Links menu.

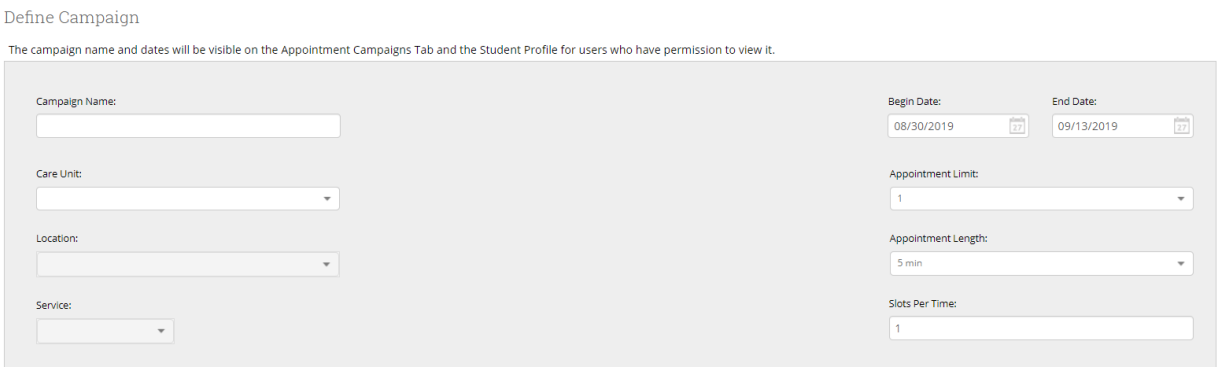


In the Actions menu, choose the type of Campaign you would like to run. In this case, choose Appointment Campaign.



Define the Campaign

In this step, you will set the criteria for your Appointment Campaign. The fields that must be filled out are listed and defined below. Note that if other staff are going to be included on this campaign, the reason/location/date range must align with Campaign Availability for the advisor(s) that are going to be included in the campaign.



- **Campaign Name:** Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns; it is not visible to the student. Make sure to adhere to SU's naming convention. It will make it easier to track the impact of your campaigns.

  Include the following in your name: Term, College, Purpose, Last name of user who created the campaign (Example: Fall 2019 Program Planning Boog)

- **Care Unit:** Select the Care Unit the Appointment Campaign will be associated with
- **Location:** Select the location of where the appointment(s) will be held.
- **Service:** Select the Service that will be associated with the campaign
- **Course or Reason:** Add the reason or associated course for the campaign here. This will only appear if the Service is tied to a course
- **Begin and End Date:** These are the dates that you want students to start and stop making appointments for the campaign.
- **Appointment Limit:** This will determine how many appointments you wish for the student to schedule during the campaign.
- **Appointment Length:** This is where you define exactly how long the appointment will be. Durations begin at a 5 minute length and will be determined by your configuration.
- **Slots per Time:** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.

Add Students to Campaign

After entering the details on the Define Campaign page, click Continue.

Your next step is adding students. If you created this campaign directly from a Watch List or Saved Search, you will be asked to review your students. If not, you can invite all of your assigned students or use the Advanced Search to pull a population.

If you choose the Advanced Search option, you will be presented with a list of students and must select the students you wish to add. Then choose **Add Selected Users and Search for More** from the actions menu.

You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed.

Once finished, click **Continue** to move to the next page. You will be asked to review the students in the campaign. If these are correct, click **Continue**.

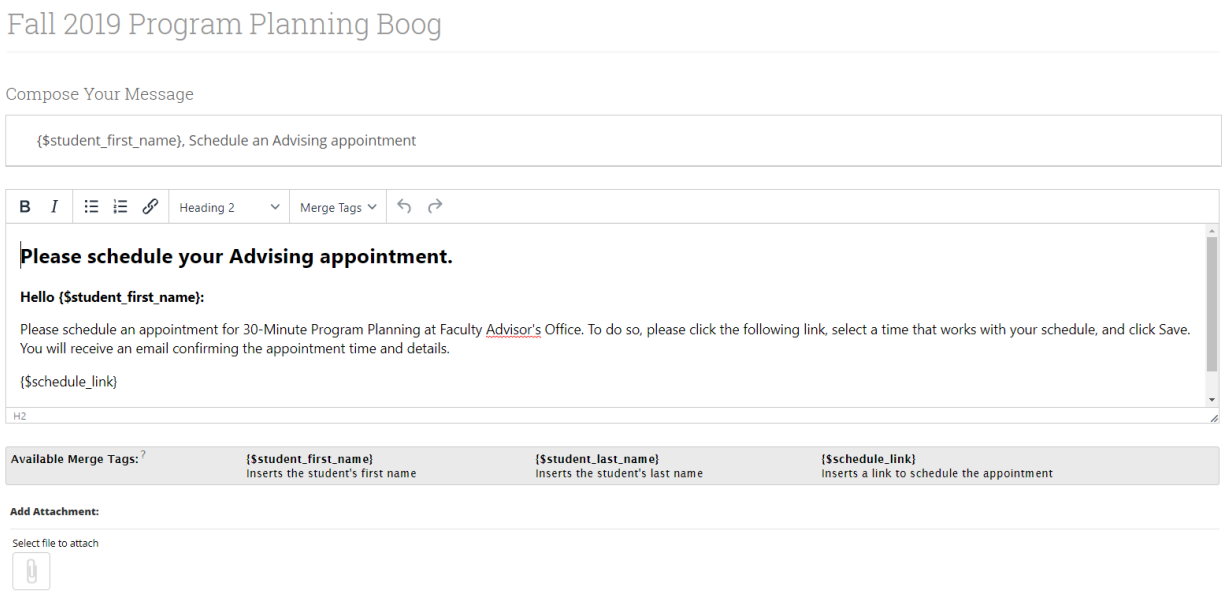
Add Staff to Campaign

You will need to select yourself as staff for the campaign. You may also have the option to select additional staff to make them available for appointments based on the campaign.

NOTE: Staff will need to have availability defined before they can be added to an appointment campaign. If you do not see staff you expected to have availability, make sure their calendars and availability are up-to-date.

Compose Your Message

Your next step is to compose the message that you will send to students. DO NOT REMOVE THE SCHEDULE LINK FROM THE EMAIL BODY.



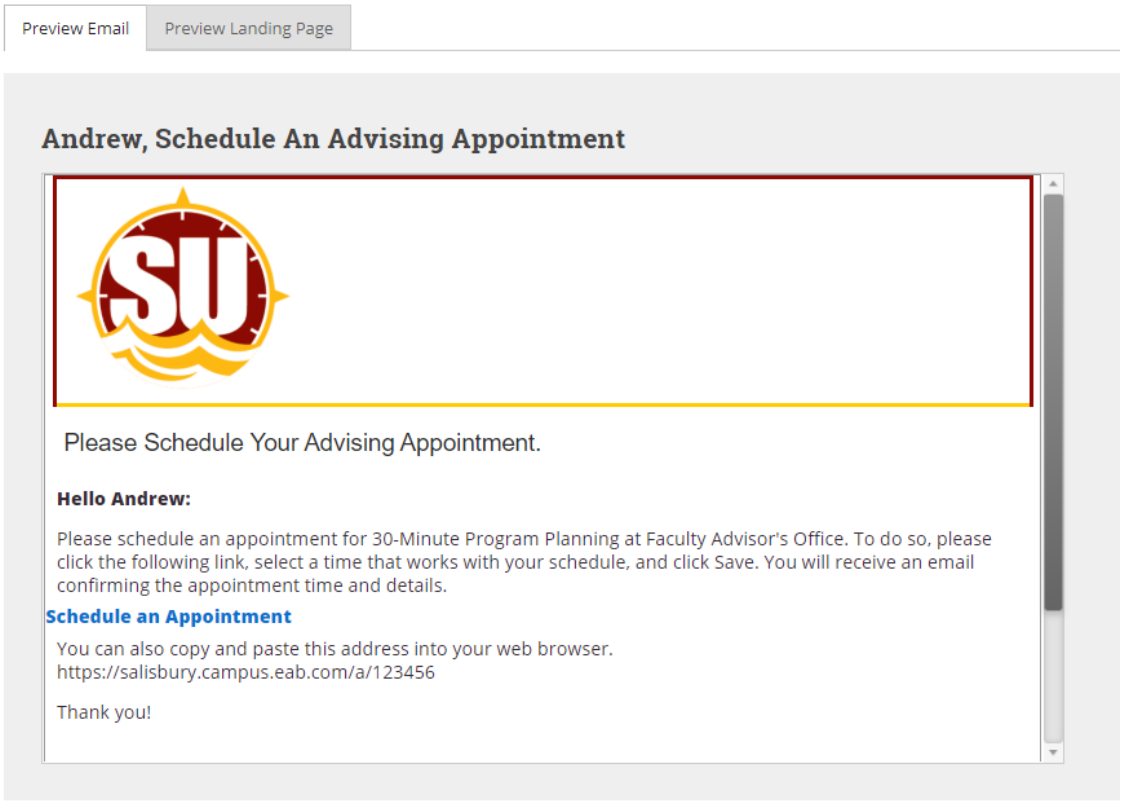
Fields used in the message composition are:

Email Subject: The topic will be the subject of the email going to the student.

Instructions or Notes: This will be specific to the landing page students will be taken to when they click on the link in their email to choose the date and time of their appointment.

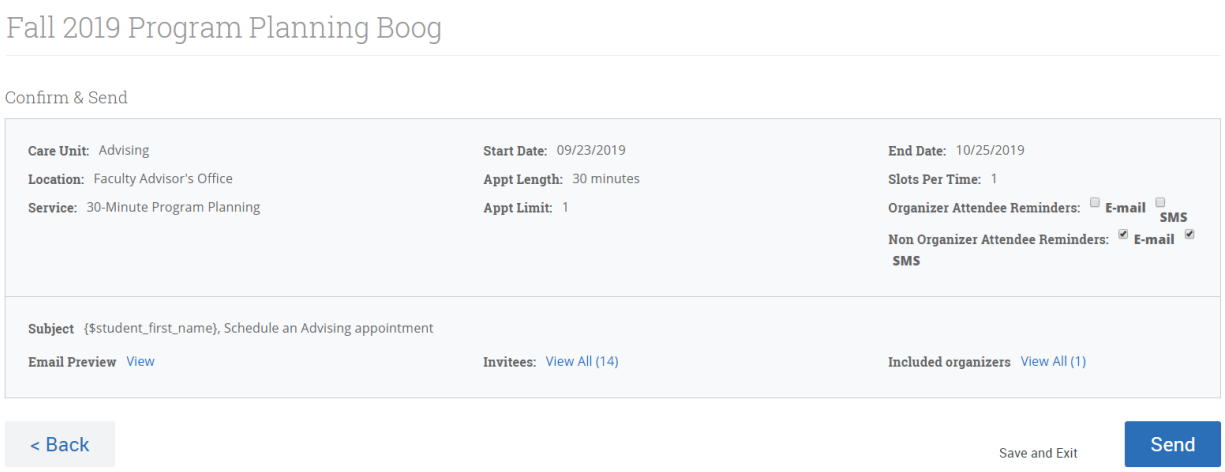
Note that you can include attachments.

You can preview how the email will look at the bottom of the page.



After you have finished composing and previewing your message, it's time to send out your campaign!

Review your campaign details, invitees, and advisors on this page.



Click **Send** when you are ready to email the invites to the selected students.