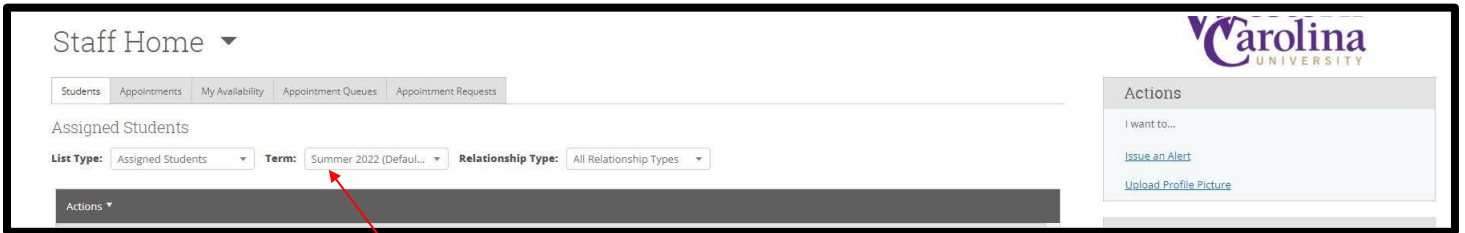


Navigate: How to Run an Advising Appointment Campaign

1. Appointment Campaigns allow you to invite a group of students to schedule an appointment with you for a specific reason. While there are many reasons you might conduct an Appointment Campaign, most faculty and staff use this feature for advising. Once you have logged in to Navigate and adjusted your term,



Staff Home ▾

Students Appointments My Availability Appointment Queues Appointment Requests

Assigned Students

List Type: Assigned Students ▾ Term: Summer 2022 (Default... ▾ Relationship Type: All Relationship Types ▾

Actions ▾

Actions

I want to...

[Issue an Alert](#)

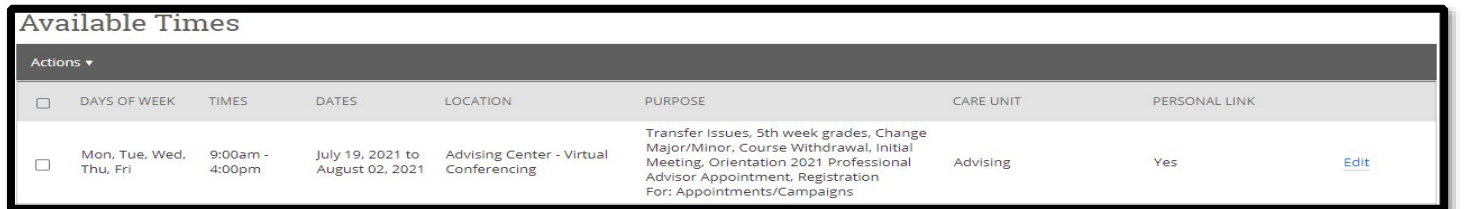
[Upload Profile Picture](#)

Make sure that your Navigate Calendar is synced to your electronic calendar (for instructions on how to synch your calendar [Click Here](#), and make sure that your appointment availability is set up for **Campaigns** (for instructions on how to set up your availability, [Click Here](#))



What type of availability is this?

Appointments Drop-ins Campaigns



Available Times							
Actions ▾							
<input type="checkbox"/>	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK
<input type="checkbox"/>	Mon, Tue, Wed, Thu, Fri	9:00am - 4:00pm	July 19, 2021 to August 02, 2021	Advising Center - Virtual Conferencing	Transfer Issues, 5th week grades, Change Major/Minor, Course Withdrawal, Initial Meeting, Orientation 2021 Professional Advisor Appointment, Registration For: Appointments/Campaigns	Advising	Yes Edit

2. Click on the **Campaigns** icon on the left-hand side blue bar



3. Now, under **Appointment Campaigns** button, click **Appointment Campaigns** and then **Add New**

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.

[+ Add New](#)

*Last Updated: 08/27/24

4. A form will appear on your screen, fill out each box as instructed.

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

Campaign Configurations

* Campaign Name: Instructions or Notes for Landing Page:

* Care Unit: * Location:

* Service:

Appointment Configurations

* Appointment Limit: * Appointment Length:

* Slots Per Time:

Allow Scheduling Over Courses

Staff Reminders: Email Text **Recipient Reminders:** Email 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 nudges.

* Start Date: * End Date:

a. You can use the **allow scheduling over courses** to allow students to schedule an appointment on advising day even if they have a class during that time.

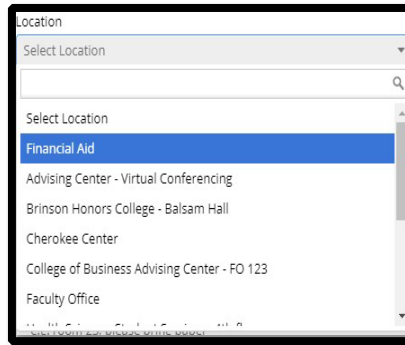
b. Your **Care Unit** refers to your office or school

Care Unit:

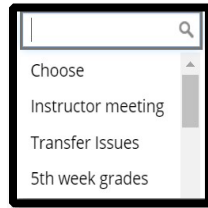
Choose

- Advising
- Center for Career and Professional Development
- Educational Outreach
- General
- Mentoring and Persistence to Success (MAPS)
- Tutoring

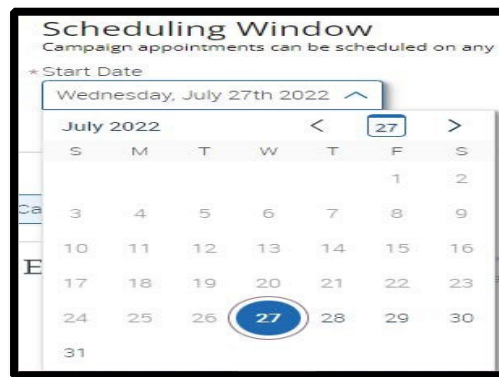
c. Your **Location** refers to your office or department



d. Your **Service** should be your purpose for the **Appointment Campaign**

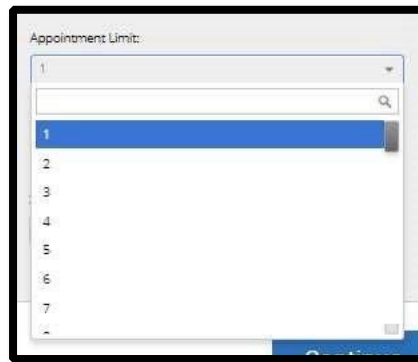


e. Adjust your **Begin Date** and **End Date** to reflect how long you would like your campaign to be active.



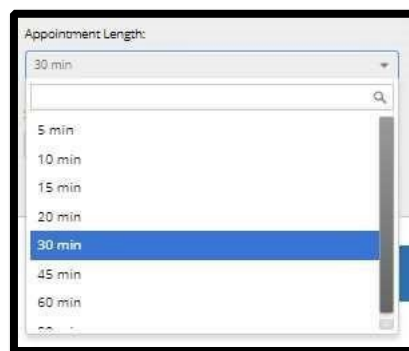
*Last Updated: 08/27/24

- f. Your **Appointment Limit** refers to how many times the student can schedule an appointment with you during this campaign. (setting it at two allows for a back up option in case of emergency).



A screenshot of a dropdown menu titled "Appointment Limit:". The menu is open, showing a list of numbers from 1 to 7. The number 1 is highlighted in blue. There is a search icon in the top right corner of the menu.

- g. Set your **Appointment Length** to the amount of time you would like scheduled for each appointment



A screenshot of a dropdown menu titled "Appointment Length:". The menu is open, showing a list of time intervals: 5 min, 10 min, 15 min, 20 min, 30 min, 45 min, and 60 min. The 30 min option is highlighted in blue. There is a search icon in the top right corner of the menu.

- h. **Slots Per Time** should be set to **1**, unless you would like to have multiple students schedule for the same time slot.



A screenshot of an input field titled "Slots Per Time:". The field contains the number 1.

*Last Updated: 08/27/24

- i. Click the continue button on the lower right-hand side of the form



- j. The next screen will ask you to **Add Recipients To Campaign**, search for your list of students. If you would like to invite another list of students, select **Add More Recipients** and choose your criteria.

- k. **Review Students In Campaign**, if you have certain advisees you do not need to meet with, click the check box next to their name, then click the **Actions** button in the dark gray bar, and select **Remove Selected Users**

- l. On the **Select Staff for Campaign** screen, select the check box next to your name, and click **Continue**. You will need to have your availability set before your name will show up on this screen.


ID	NAME	AVAILABLE TIMES
<input checked="" type="checkbox"/>	Steve Zwilling	For: Appointments/Campaigns Mon-Fri 9:00am - 4:00pm ET (July 19, 2021 - August 2, 2021)

- m. The next screen prompts you to **Compose Nudges**, Nudges are the emails that are sent to your student with the campaign link. You may compose more than one nudge to be sent as a reminder. All nudges have a customizable send date. In addition, a Success Message may be sent to a student confirming that they have scheduled their appointment. Click the **Add Welcome Message** or **Add Success Message**.

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

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 recipients scheduling all campaign appointments. 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.

Compose Message

[Apply a Template](#)

Subject *

{Student_first_name}, Schedule an Advising appointment

Message *

Heading 2

Please Schedule Your Advising Appointment.

Hello {Student_first_name}:

Please schedule an appointment for Instructor meeting at Advising Center. 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.

{Schedule_link}

All text is customizable, but don't delete any text found in {brackets}, as these will auto-populate the student's first name as well as the link to schedule the appointment. You can add more than to send the message by adding more nudges.

Enhance with AI

Prompt

What would you like help to write?

Tone

Message Length

By initiating this action, you consent to the use of this application provided by EAB, our third-party service provider and OpenAI, their third-party service provider. EAB and Western Carolina University will record and maintain a transcript of this interaction. For further information about our information practices, please see our Privacy Policy [here](#). AI systems are not perfect and may make mistakes. Please review the message carefully. You are responsible for the messages you send.

[Enhance](#)

- AI enhancement allows you to customize a message or prompt using features that benefit your overall outreach. For example, you can adjust the tone and length of your message to achieve your desired result.

n. Select your desired **Send Date**, then preview your Nudge on the right-hand side of the screen.



o. Click **Save Welcome Message**.



p. On the final screen, review the details of your campaign, and click **Continue**.

Campaign Summary

Define Campaign	Name: FA24_LC101_SZ Care Unit: Advising Location: Advising Center Service: LC 101 Meeting Appointment Limit: 2 Appointment Length: 30 mins Slots Per Time: 1 Scheduling Window: 08/28/2024 - 09/23/2024 Allow Scheduling Over Courses: No Staff Reminders: Email - Yes Text - No Recipient Reminders: Email - Yes Text - No
Recipients	View 4 recipients
Staff	View 1 staff
Welcome Message	Send Date: Day added Subject: ({student_first_name}), Schedule an Advising appointment Email Preview: View Email

When a student has scheduled an appointment, you will receive an email notification, and the appointment will auto-populate onto your electronic calendar and theirs.