

BOILERCONNECT FEATURE SPOTLIGHT SERIES

September 2023

Appointment Campaigns

Feature Spotlights

Fall 2023

- August – Sending Messages
- *September – Appointment Campaigns*
- October – Staff Dashboard
- November – Issues Alerts and Managing Cases
- December – Student Lists and Saved Searches

Today

Appointment Campaigns

- What, Why, & How
- Campaign Nudges Deep Dive
- Campaign Data Deep Dive
- What's Next?

What, Why, & How

Encourage specific populations of students to schedule an appointment for a specific reason.

At-a-glance
statistics
providing key
metrics

Opportunity to
set up “nudge”
messages

What, Why, & How

Two types of Appointment Campaigns:

Open-ended – students added throughout the semester

Closed-ended – students added all at once

Open-ended

Prospective
CODO, Academic
Success Center

Closed-ended

registration,
academic notice,
fall check-ins

What, Why, & How

1. Open the **Campaigns** page and select **Add New** from the Appointment Campaigns section.

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](#)

What, Why, & How

2. Set the criteria for the campaign.

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 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 *

End Date *



What, Why, & How

3. Add students.

Add Recipients To Campaign

New Search

Save Search

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

First Name?	Last Name?	From Last Name?	To Last Name?	Student ID?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender	Race or Ethnicity	Preferred Name?	Student List (In Any of These)	
All	All	<input type="text"/>	All	
Transfer Student	Category (In Any of These)?			
Any	All			
Email(s)	Tag (In Any of These)?			
<input type="text"/>	All			

Enrollment History Enrollment Terms

Area of Study College/School, Degree, Concentration, Major

Term Data Classification, Section Tag, Term GPA

Performance Data GPA, Hours, Credits

Course Data Course, Section, Status

Assigned To

Goals & Interests Post Degree Goal, Favorites?

Academic Plan Planned Terms, Plan Warnings?

Polls Questions, Choices?

Success Indicators Support Level, Success Markers

Search Include Inactive My Students Only At-Risk Students Only

What, Why, & How

4. Add staff.

Important

Staff must have availability set 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.

Nudge Deep Dive

Overview

- Can be sent as email or text message
- Follow the same logic as typical BoilerConnect email and text messages ([*see August 2023 Feature Spotlight for more info*](#))
- Can include hyperlinks – scheduling link and language is constant throughout all nudges
- Welcome Message sends immediately after starting the appointment campaign
- All other nudges send the morning of the date chosen when you create the nudge
- Success Message is an email or text message sent the day after the recipient schedules the appointment for the campaign

Nudge Deep Dive

Important!

- Nudges other than the Welcome and Success Messages are not recommended for open-ended campaigns.
- An unlimited number of nudges can be created.....but should they?
[Refer to the BoilerConnect Communication Guidelines.](#)
- Only one nudge message can be sent per day.
- Nudges can be edited or deleted until they are sent.
- Additional nudges can be created until the Appointment Campaign ends.
- Previously created nudges can be viewed on the Verify & Start section of the campaign details.

Campaign Data Deep Dive

Five at-a-glance metrics

Appointment Campaigns

[View All Campaign Types](#)

+ Add New

Filter by care unit: All Care Units View only my campaigns

NAME	STATUS	RECIPIENTS	APPTS SCHEDULED	APPTS ATTENDED	SUMMARIES CREATED
Article Updates WL ADVISING <small>[unsent] 07/24/2023 - 08/07/2023</small>	Draft	5			Resume Delete
WL test WL ADVISING <small>[Expired] 03/16/2023 - 04/25/2023</small>	Expired	2	<div style="width: 50%;"><div style="width: 50%; background-color: #0070c0;"></div></div> 50%	<div style="width: 0%;"><div style="width: 0%; background-color: #ccc;"></div></div> 0%	<div style="width: 0%;"><div style="width: 0%; background-color: #ccc;"></div></div> 0%
Test LW WL ADVISING <small>[Expired] 01/20/2023 - 02/13/2023</small>	Expired	1	<div style="width: 0%;"><div style="width: 0%; background-color: #ccc;"></div></div> 0%	<div style="width: 0%;"><div style="width: 0%; background-color: #ccc;"></div></div> 0%	<div style="width: 0%;"><div style="width: 0%; background-color: #ccc;"></div></div> 0%
Test for Allow Scheduling WL ADVISING <small>[unsent] 11/14/2022 - 11/28/2022</small>	Draft	2			Resume Delete
Reminder Test 10/11 WL ADVISING <small>[Expired] 10/11/2022 - 10/14/2022</small>	Expired	1	<div style="width: 0%;"><div style="width: 0%; background-color: #ccc;"></div></div> 0%	<div style="width: 0%;"><div style="width: 0%; background-color: #ccc;"></div></div> 0%	<div style="width: 0%;"><div style="width: 0%; background-color: #ccc;"></div></div> 0%

Campaign Data Deep Dive

Statistics within the Appointment Campaign

Appointment Campaigns > WL test

Expired 03/16/2023 - 04/25/2023

STUDENTS IN CAMPAIGN

2

APPOINTMENTS MADE

50%

1 Students

APPOINTMENTS ATTENDED

0%

0 Students

SUMMARIES CREATED

0%

0 Students

Nudge Metrics

Welcome Message
Send Date: 03/16/2023 **Subject:** {Student_First_Name} Schedule a WL Advising appointment

[CLICK TO OPEN RATE DS](#)

Emails Sent: 2

Emails Opened: 0

Links Clicked: 0

Appointments Scheduled | Appointments Not Yet Scheduled | Summaries Created | Eligible Appointments

Actions	INDEX	APPT DATE	APPT TIME	STUDENT	STUDENT AT TIME	ATTEND?	APPT CREATED ON
<input type="checkbox"/>	1	03/17/2023	9:00am - 9:30am ET	Mistary_Sol	No	No	03/15/2023 View Details

Options

[Edit Campaign Details](#)

[Delete This Campaign](#)

[Export Student List](#)

Campaign Information

Care Unit
WL advising

Service
First Year Advising

Location
WL Center for Success

Default Appointment Length
30min

Slots Per Time
1

Appointment Limit
1

Scheduling Window
03/16/2023 - 04/25/2023

Campaign Created On
02/09/2023

Allow Scheduling Over Courses
Yes (Enabled for entire school)

Staff Reminders
Email - Yes | Text - Yes

Recipient Reminders
Email - Yes | Text - Yes

Campaign Data Deep Dive

Statistics within the Appointment Campaign

Appointments Scheduled		Appointments Not Yet Scheduled		Summaries Created		Eligible Appointments		
Actions ▾								
<input type="checkbox"/>	INDEX	APPT DATE	APPT TIME	STUDENT	STUDENT ATTENDED?	AT-RISK?	APPT CREATED ON	
<input type="checkbox"/>	1	03/17/2023	9:00am - 9:30am ET	Mercury, Ami	No	No	03/16/2023	View Details

What's Next?

Things to consider when using Appointment Campaigns

- How would you like to impact your students with campaigns? What student populations do you envision this would be used for?
- Who should be launching campaigns? Should campaigns be part of each staff member's personal workflow? Or should they be more centralized and launched by unit leaders?
- What guidance do you plan to give to your staff as far as follow-up? If a student does not respond, when is an appropriate time to resend invitation, send email, or text?

What's Next?

Appointment Campaign Ideas

- Students retaking a course
- “Murky Middle” students
- First-year students who have missed the grade threshold for one or more “milestone” courses
- Students within 0.2 of the GPA requirement for their program
- Lower division students at risk of not meeting requirements for upper division
- Students interested in health careers, but not likely to meet pre-health requirements

What's Next?

Appointment Campaign Ideas

- Sophomores or juniors in need of summer/winter credits to graduate in four years
- Students with low credit completion ratios for the term (e.g. less than 75%)
- Students who improved their GPAs or earned a 4.0 for the term (“Keep it up” campaign)
- Students at risk of losing financial aid or scholarships
- Honors students whose cumulative GPA has dropped below 3.0

What's Next?

Appointment Campaign Ideas

- Students with downward trending GPAs
- Students who are strong candidates for graduate school
- Students eligible for study abroad programs
- Students eligible for internships/co-op experiences
- Former stop-out students who could return and graduate “easily”
- Others?

THANK YOU

Join us October 5th for our next feature spotlight – the staff dashboard!