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?
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
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
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
2. Set the criteria for the campaign.

Campaign Configurations

- Campaign Name: [Field]
- Instructions or Notes for Landing Page: [Field]
- Case Unit: [Select Case Unit]
- Location: [Select Location]
- Service: [Select Service]

Appointment Configurations

- Appointment Limit: [1]
- Appointment Length: [30 min]
- Slots Per Time: [1]

- Allow Scheduling Over Courses

Staff Reminders: [Email, Text]
Recipient Reminders: [Email, Text]

Scheduling Window

- Start Date: [September 5, 2023]
- End Date: [September 20, 2023]
3. Add students.
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.
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**

**Filter by care unit:** All Care Units

<table>
<thead>
<tr>
<th>NAME</th>
<th>STATUS</th>
<th>RECIPIENTS</th>
<th>APPTS SCHEDULED</th>
<th>APPTS ATTENDED</th>
<th>SUMMARIES CREATED</th>
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<tbody>
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<td><strong>Article Updates</strong></td>
<td>Draft</td>
<td>5</td>
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<tr>
<td>WL ADVISING</td>
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<td>[expired] 03/16/2023 - 04/25/2023</td>
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</table>
Campaign Data Deep Dive

Statistics within the Appointment Campaign

Appointment Campaigns

Number of Students: 2
Appointments Made: 50%
Appointments Attend: 0%
Summaries Created: 0%

Options
- Edit Campaign Details
- Join this Campaign
- Export Student List

Campaign Information
- Course Field: Mathematics
- Service: First Year Advising
- Location: WL Center for Success
- Default Appointment Length: 30min
- Items Per Time: 1
- Appointment Limit: 1
- Scheduling Windows:
  - 03/16/2023 - 04/23/2023
- Campaign Created On: 02/28/2023
- Allow Scheduling Over Courses: Yes (Disabled for entire school)
- Staff Permissions:
  - Email - Yes
  - Text - Yes
  - Request/Reminders:
    - Email - Yes
    - Text - Yes

9/7/2023
## Campaign Data Deep Dive

Statistics within the Appointment Campaign

<table>
<thead>
<tr>
<th>Appointments Scheduled</th>
<th>Appointments Not Yet Scheduled</th>
<th>Summaries Created</th>
<th>Eligible Appointments</th>
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<tr>
<td><strong>Actions</strong></td>
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<tr>
<td>INDEX</td>
<td>APPT DATE</td>
<td>APPT TIME</td>
<td>STUDENT</td>
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<tr>
<td>1</td>
<td>03/17/2023</td>
<td>9:00am - 9:30am ET</td>
<td>Mercury, Ami</td>
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</table>

[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!