Campaign User Guide

***Remember**: All information you enter into T-Claw Navigate360 becomes a part of students' official academic record. Students have the legal right to review their entire academic record.*

Launching an Email Messaging Campaign

This workflow guide covers how to create and launch an Email Campaign. Email Campaigns are a new type of Navigate campaign that allows your school to email a group of students on specified dates about things they need to do or activities they need to attend. This type of campaign has no objective, unlike Appointment or Enrollment Campaigns, so students receive all emails in the campaign.

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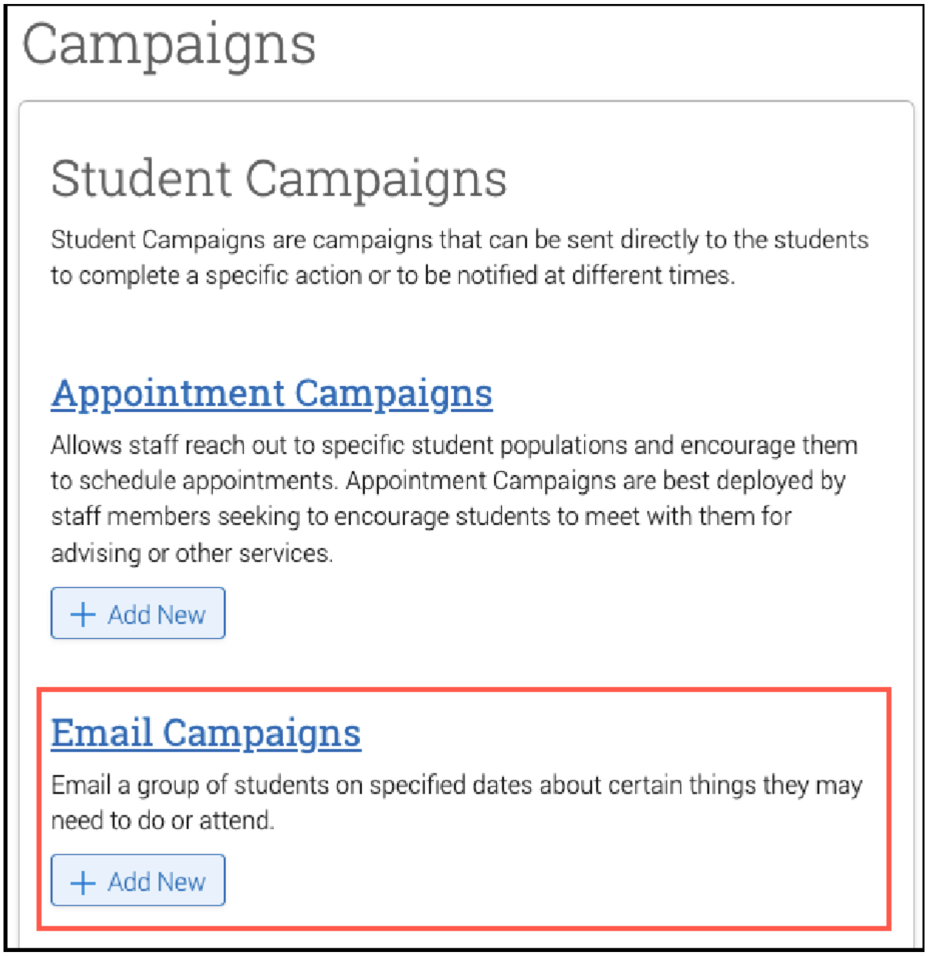
Email Campaigns and Navigate

Email Campaigns are a critical part of Navigate workflow. Strategic questions should be asked when creating email campaigns, such as:

- 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?

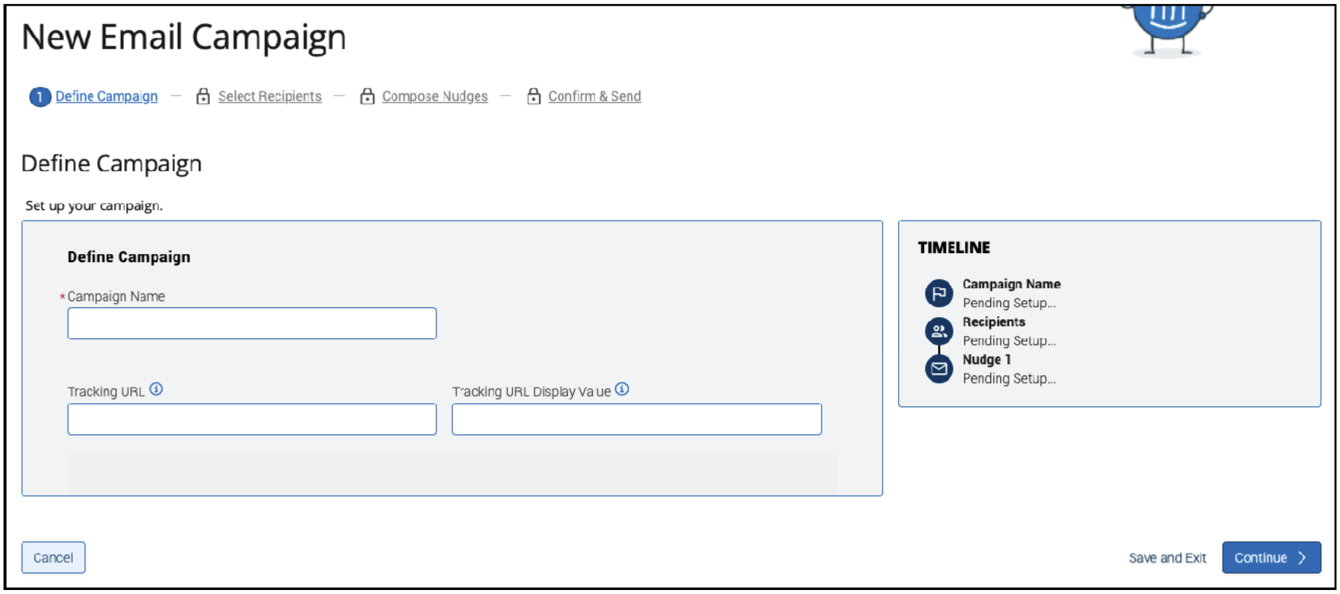
Launching an Email Campaign

To begin, open the **Campaigns** page and select **Add New** from the Email Campaigns section.



Define the Campaign

The **New Email Campaign** page opens. Now you set the criteria for the Email Campaign. The fields that must be filled out are listed and defined below.



Campaign Name

Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

> **Note.** Start campaign names with the most important info. Academic term is the most important!. Some formats could include: Term, Population, Purpose; Term, Population, College, Purpose; Term, College, Purpose, Last name of user who created the campaign. Examples include: "F19 Freshmen Reg Campaign", "F20 1st Time Freshmen Business 15-to-finish", or "S21 Freshmen Bio Major Decl, J. Smith"

Tracking URL

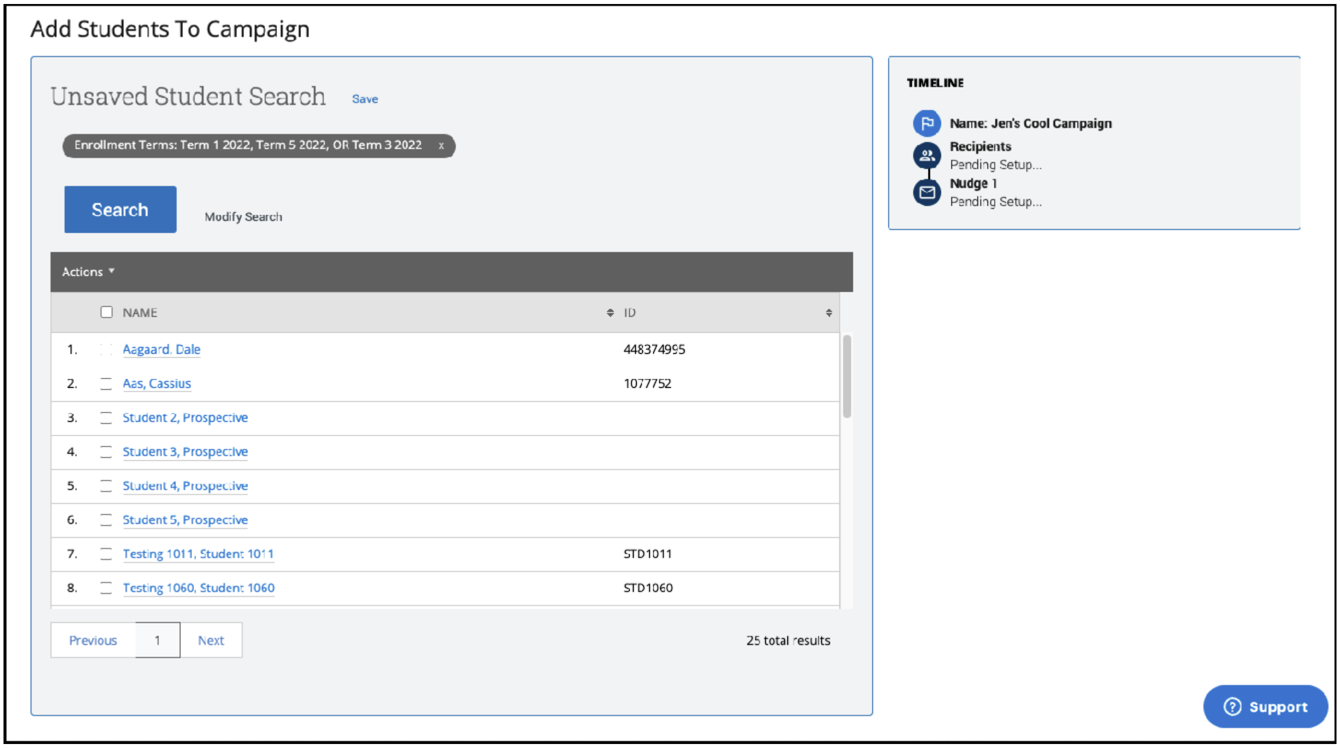
The URL you want students to click. This can be any URL, but you probably want it to take students directly to a registration site.

Tracking URL Display Value

The text students will see in the email message encouraging them to enroll. When students click the text, they go to the Tracking URL

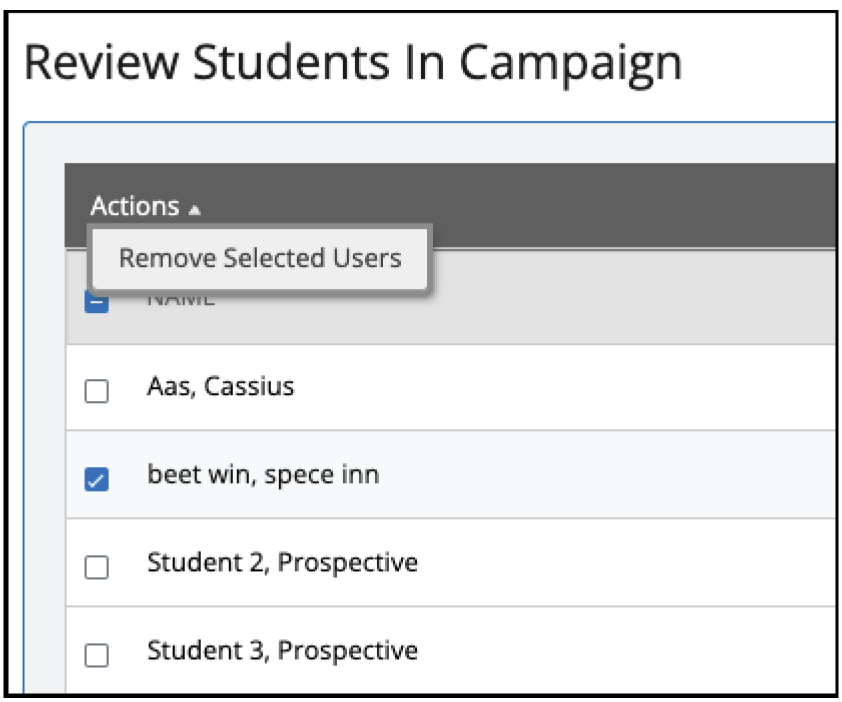
Add Students to Campaign

The next step is performing a search to find recipients for the campaign. Set your criteria and perform the Advanced Search. The search results page appears.



Select the students to add to the campaign and click **Continue.** You may also save this search if you want. Once you've gone to the next step, this list is static and does not update.

Review the students on the next page. If a student should not be in the campaign, select the box next to their name and choose **Remove Students from Campaign** from the **Actions** menu.

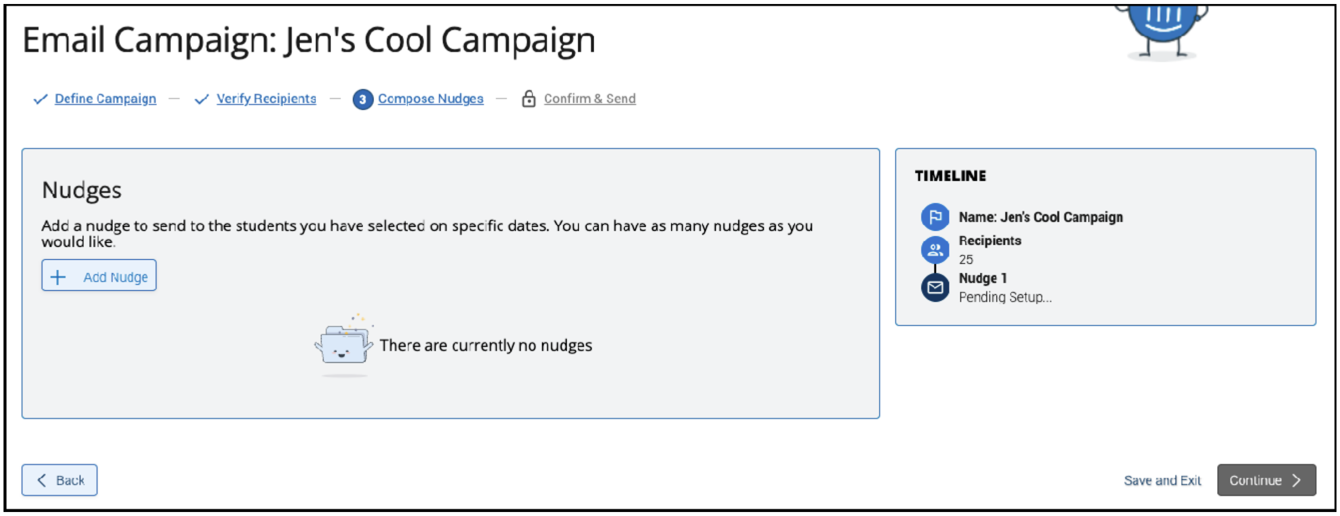


Once finished, click **Continue.**

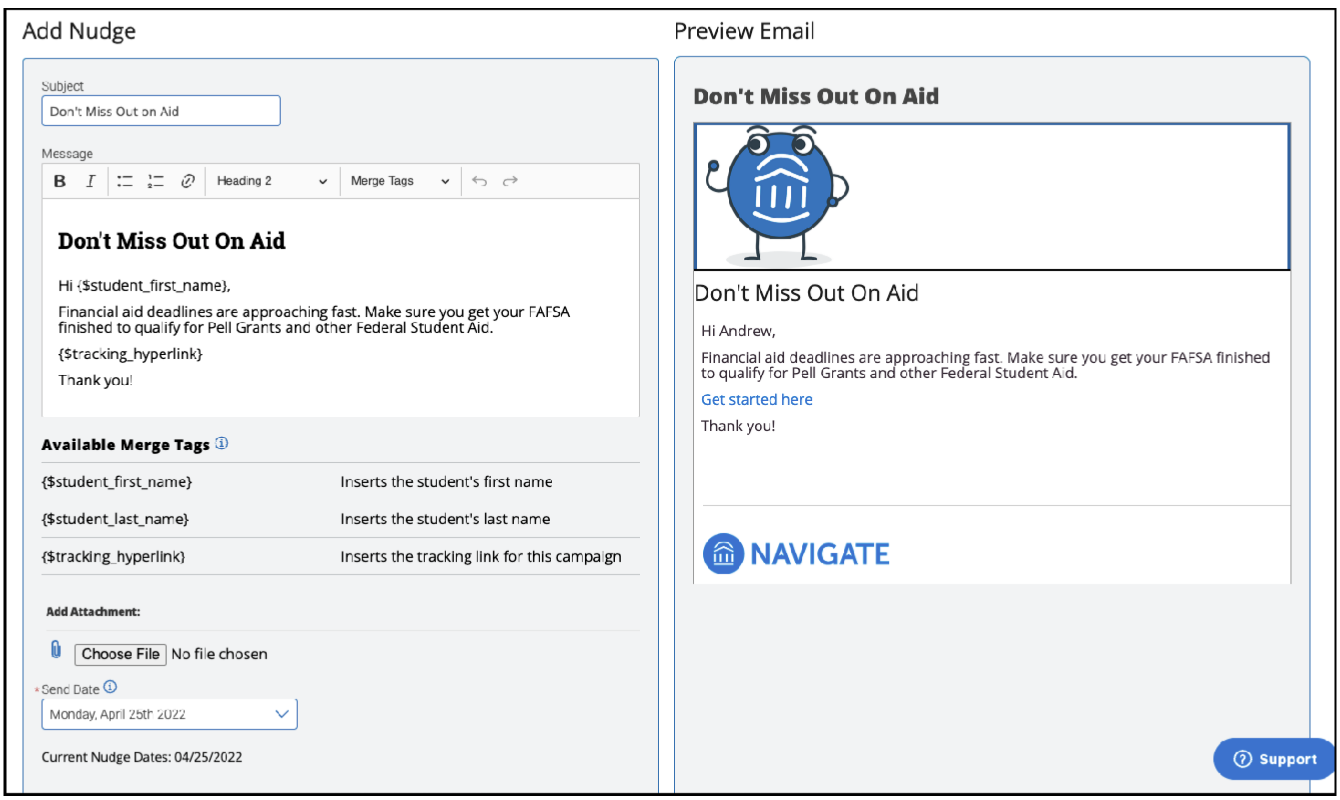
Add Nudges

Nudges allow for more communication from your school to students during an Email Campaign. Each nudge is an email sent to your campaign list. Nudge emails are sent the morning of the date chosen when you create the nudge. As with any email, some may be slightly delayed.

To create a nudge, define your campaign and create your list of students for the Email Campaign. The Nudges page opens.



Click **Add Nudge** to create your first nudge. You must create at least one nudge per campaign; however, you can create more. There are no limits on how many nudges you can send.



Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel. You can also attach a file to this message.

Fields used in the message composition are:

Email Subject

The subject of the nudge email going to the student.

Message

The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date

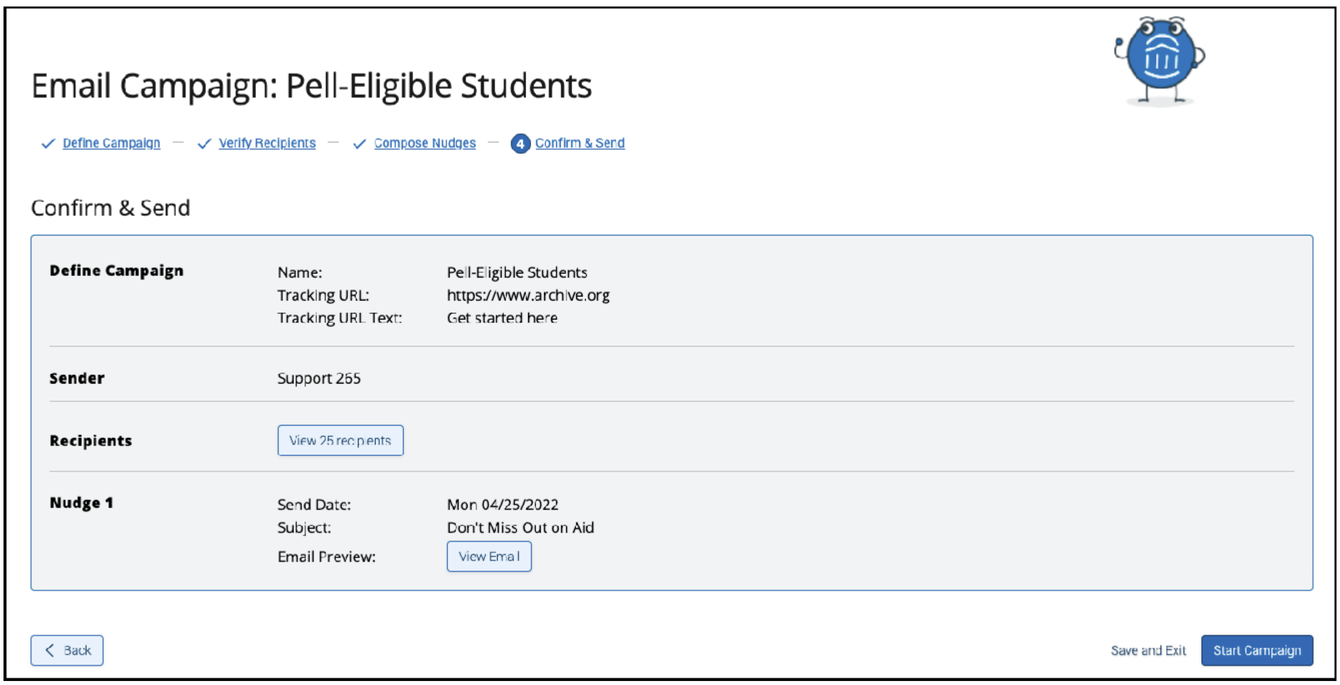
The date the email nudge is sent. The nudge with the earliest date starts your Email Campaign.

After creating a nudge, click **Save Nudge** to continue. You may continue creating nudges after this.

Important. Your Email Campaign "ends" when your last message is sent. However, you can continue to add Nudges after the last message is sent, if this is helpful to your Email Campaign.

Confirm and Send

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



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

Launching an Appointment Campaign

Intro: This workflow guide covers how to create and launch an appointment campaign.

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Appointment Campaigns and Navigate360

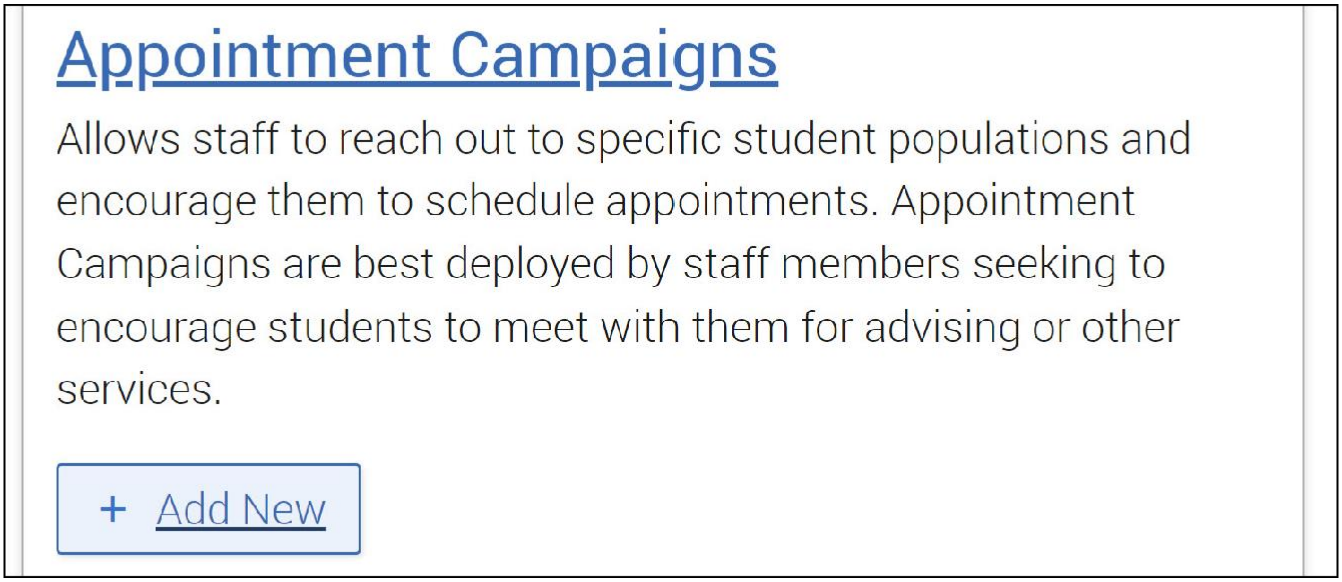
Appointment Campaigns are a critical part of Navigate360 workflow. Strategic questions should be asked when creating appointment campaigns, such as:

- 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

- 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?

Launching an Appointment Campaign

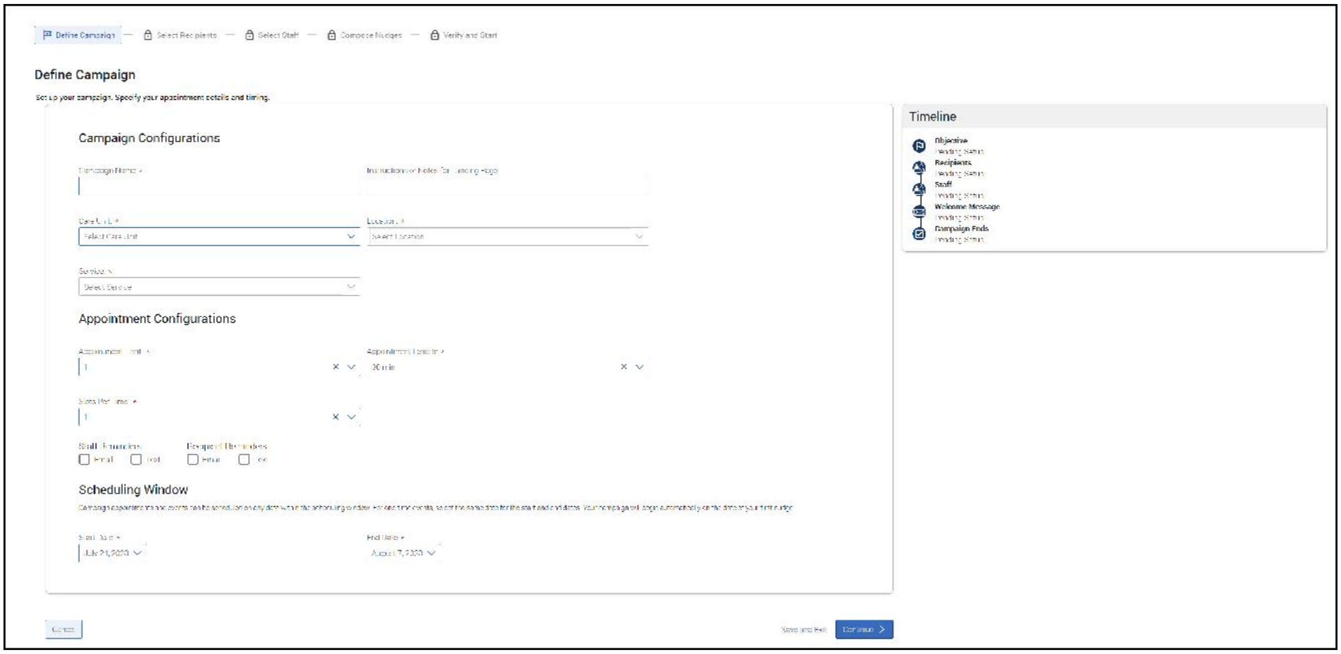
To begin, open the **Campaigns** page and select **Add New** from the Appointment Campaigns section.



Define the Campaign

The **New Appointment Campaign** page opens. Now you set the criteria for the Appointment Campaign. The fields that must be filled out are listed and defined below.

> **Note.** If other staff are going to be included on this campaign, the reason/location/date range **must** align with Campaign Availability for the advisors that are going to be included in the campaign if you want them to be available.



Campaign Name

Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

> **Note.** Start campaign names with the most important info. Academic term is the most important!. Some formats could include: Term, Population, Purpose; Term, Population, College, Purpose; Initials of the person creating campaign,Term, College, Purpose, Last name of user who created the campaign. Examples include: "TT-Fall24-Freshmen Reg Campaign", "TT-Fall24-Time Freshmen Business 15-to-finish", or "TT-Fall24-Freshmen Bio Major"

Instructions of Notes for Landing Page

This field shows instructions for the campaign the student sees when they open the Appointment Campaign notification. Make this text short and descriptive.

Care Unit

The Care Unit the Appointment Campaign is associated with.

Location

The location where the appointments will be held.

Service

The Student Service associated with the campaign.

Course or Reason

The reason or associated course for the campaign here. This only appears if the Service is tied to a course.

Appointment Limit

How many appointments you want students to schedule during the campaign.

Appointment Length

Slots per Time

Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment. The maximum number of slots is 500.

Allow Scheduling Over Courses

If checked, this box lets students schedule over course conflicts. *Course conflicts* refers to time slots where either the potential organizer or the student have conflicts due to either instructions or enrollments.

Staff Reminders

These checkboxes select what kinds of Appointment Campaign notifications the staff attached to the campaign will receive. The two options are Email and Text.

Recipient Reminders

These checkboxes select what kinds of Appointment Campaign notifications the campaign recipients (usually students) will receive. The two options are Email and Text.

Start and End Date

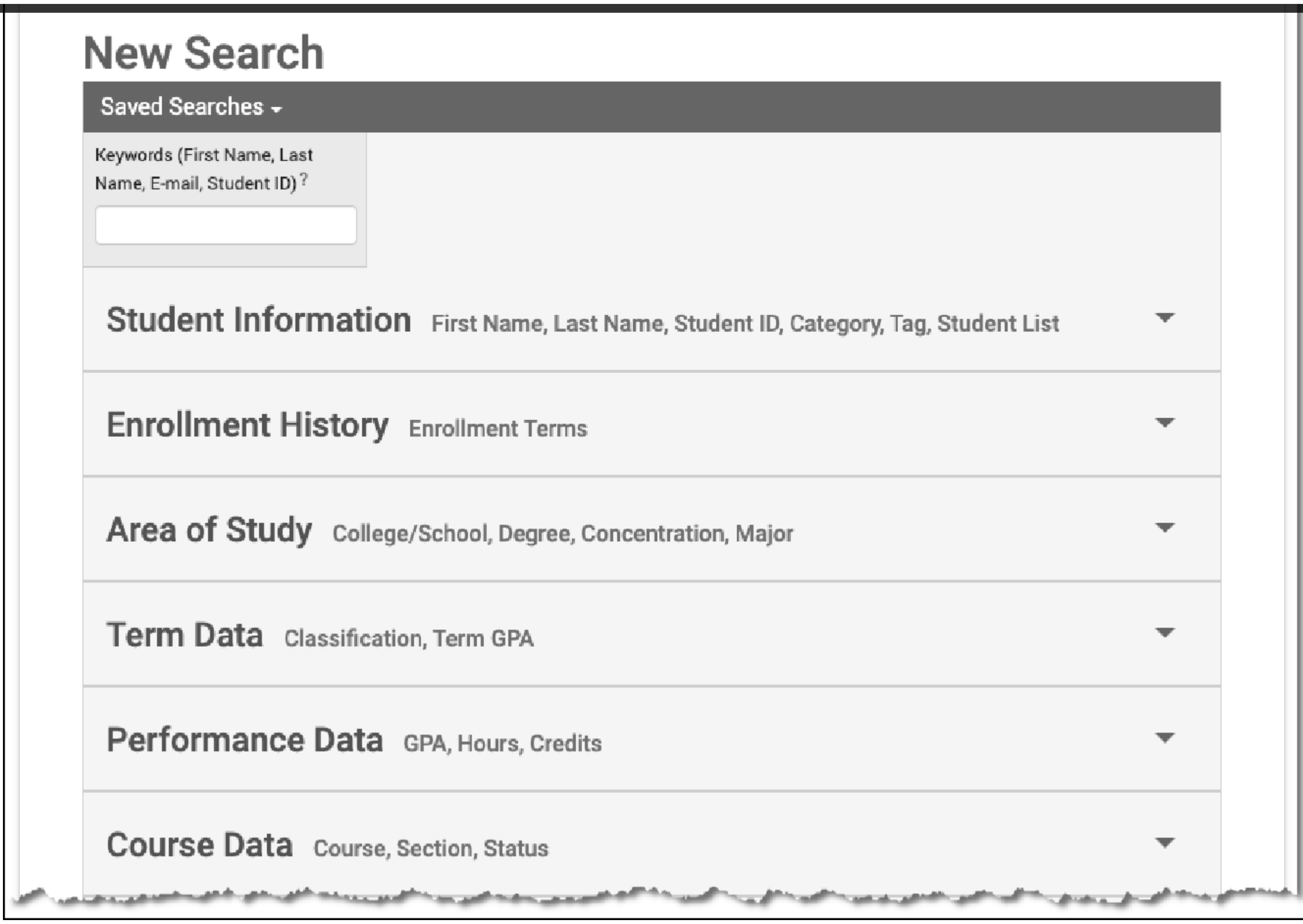
The date range that you want students make campaign appointments for.

Note. Campaigns are *Care Unit specific,* meaning they are located within a Care Unit and appointments scheduled through the Campaign will be under one specific Care Unit/Location. Appointment Campaigns *cannot* be associated with multiple Locations or Care Units.

Add Students to Campaign

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

Your next step is adding recipients. If you created this campaign directly from a Student List or Saved Search, you are asked to review your students. If not, an Advanced Search opens.

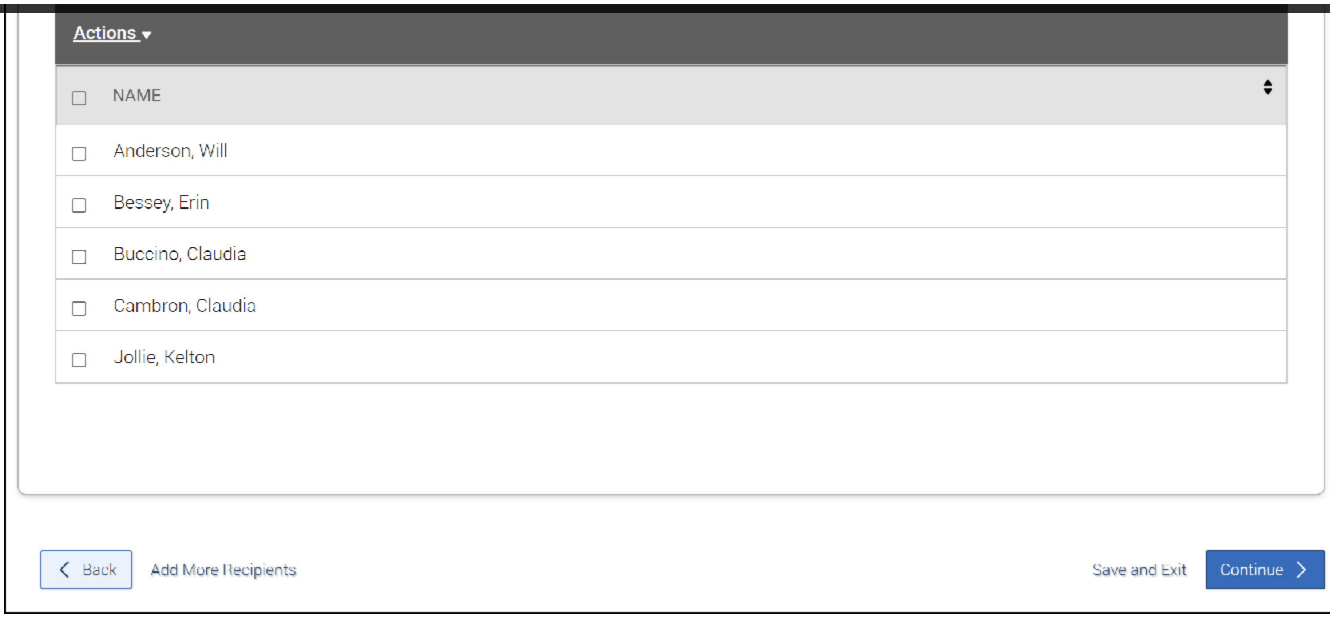


You have several ways to search for and select your students. If you want to use this campaign with an automation, you can move to the next step. Review the [Automated Actions] article to understand how to add students to an Appointment Campaign this way. If you are not using campaign automation, you can add all students assigned to you to a campaign using the *Invite All My Assigned Students* option. The other option is an Advanced Search. Use Advanced Search filters to find and select students.

After starting the search, you are presented with a list of students. Select the students you wish to add and then choose **Add Selected Users and Search for More** from the actions menu.

You can remove students from the campaign if needed and add more later. 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 are asked to review the students in the campaign IF you have added students. If these are correct, click **Continue**.

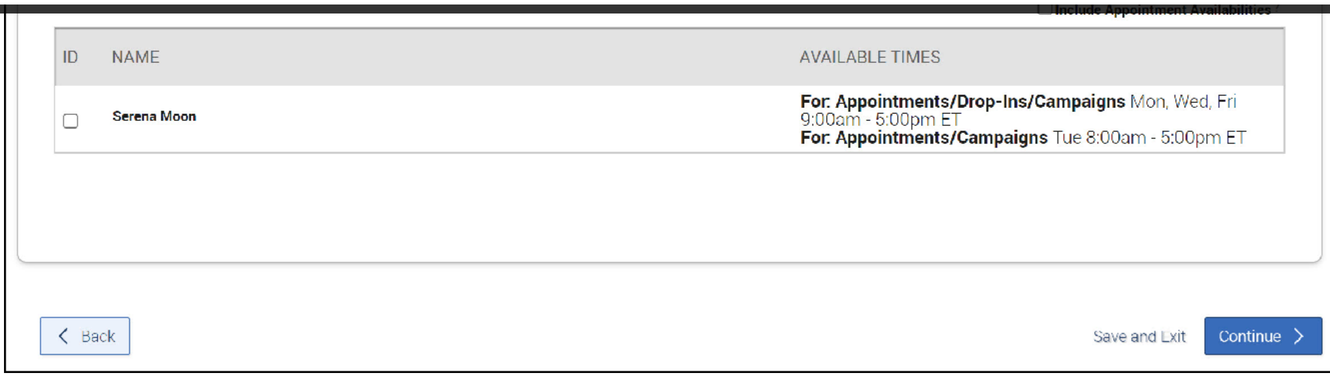


Add Staff to Campaign

Next, you need to choose Organizers for the campaign. You must select yourself. To be added to the campaign as an Organizer, you must have an Advisor or Tutor User Type. You can also select additional staff to make them available for appointments based on your role permissions.

> **Important.** Staff must 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.

If there are staff that do not set Campaign Availabilities who need to be included in the campaign, select the **Include Appointment Availabilities** options to show available advisors.



Add staff to the campaign and click **Continue**.

Add Welcome Message, Nudges, and Success Message

> **Note.** Welcome messages are the first nudge sent to students. They are sent when the student is added to the campaign or at the start of the campaign.

Nudges replace the Compose a Message functionality and allows for more communication from your school to students during an Appointment Campaign. Each nudge is an email or SMS message sent to your campaign list. You can customize the message sent to the student; however, the link and link text will always be the URL and text set in the first step of the Appointment Campaign.

Nudge emails and SMS messages are sent the morning of the date chosen when you create the nudge. Welcome messages send immediately after starting the appointment campaign. As with any email or text, some may be slightly delayed.

To create a nudge, define your campaign and create your list of students for the Appointment Campaign. The Nudges page opens.

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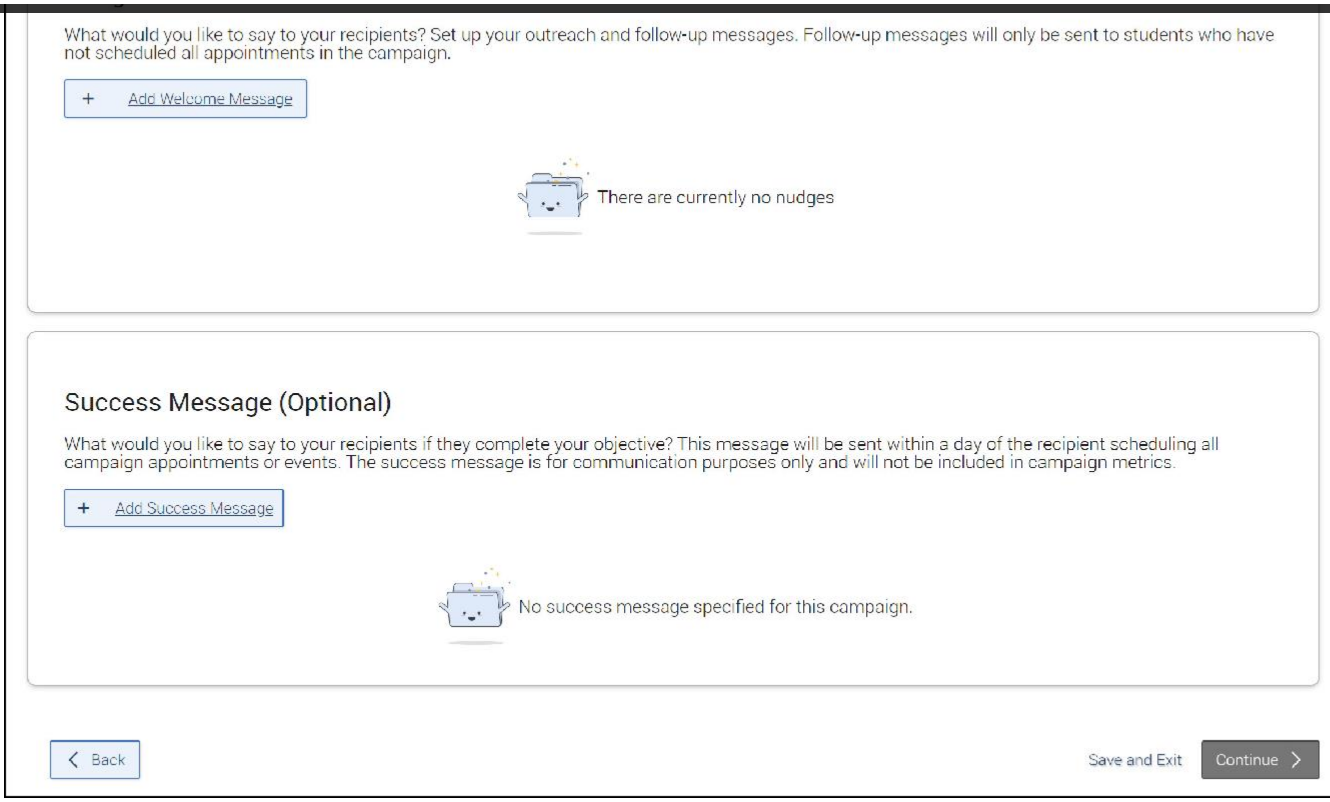


Click **Add Welcome Message** to create your first nudge.

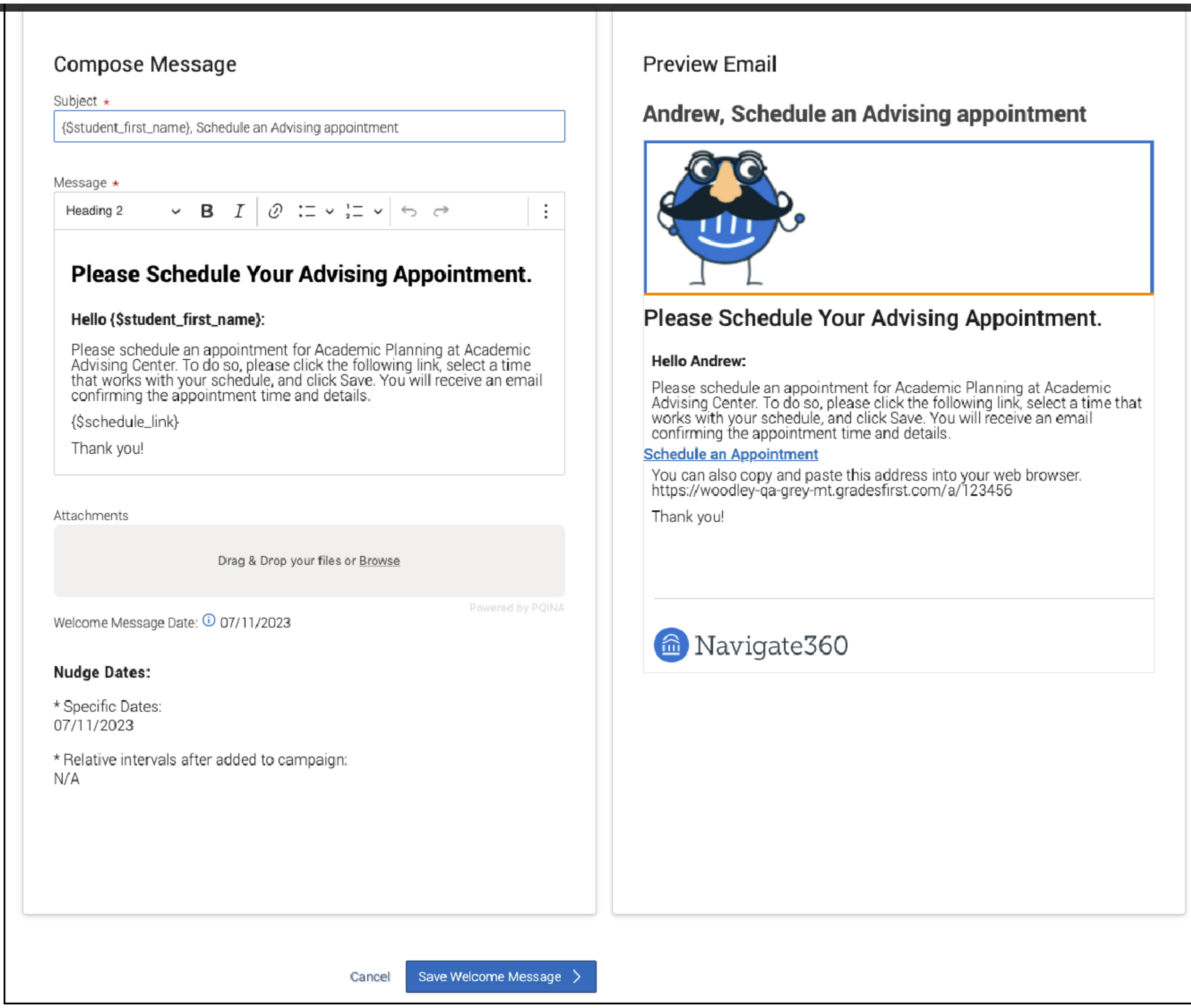
You have a choice to create either an Email nudge or an SMS nudge. You must create at least one nudge per campaign. The nudge can be either an email or an SMS. There are no limits on how many nudges you can send. Only one nudge type (email or SMS) can be sent per day.

For email messages, select the *Email* nudge type.

file to this message.

Warning. Do not remove the schedule link from the email body.

Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel.



Fields used in the message composition are:

Email Subject

The subject of the nudge email going to the student. It is Schedule an Appointment by default.

Message

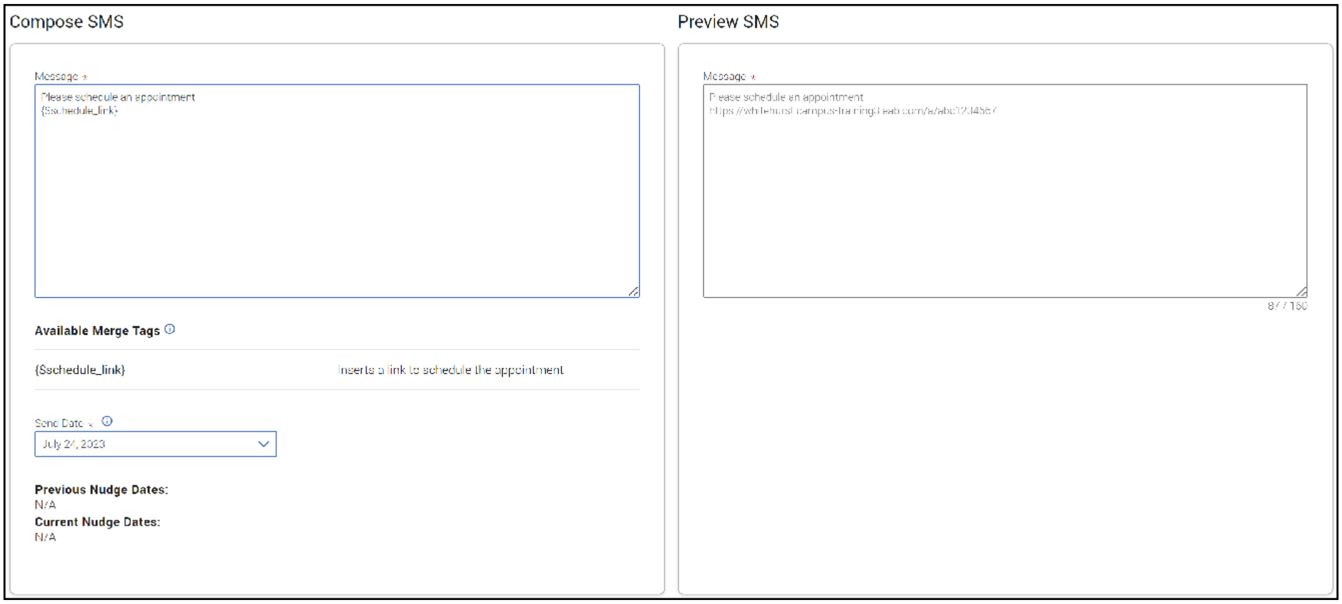
The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date

The date the email nudge is sent. This does not apply to the Welcome Message

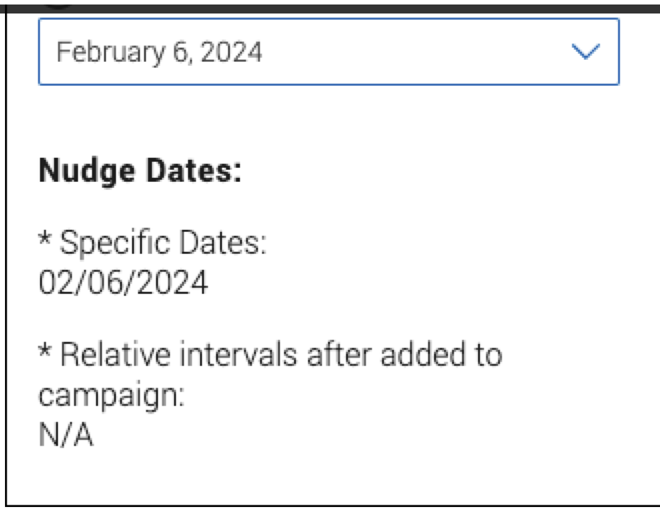
After creating a nudge, click **Save Nudge** to continue.

For an SMS, select the *SMS* nudge type. A similar page with more limited options displays.



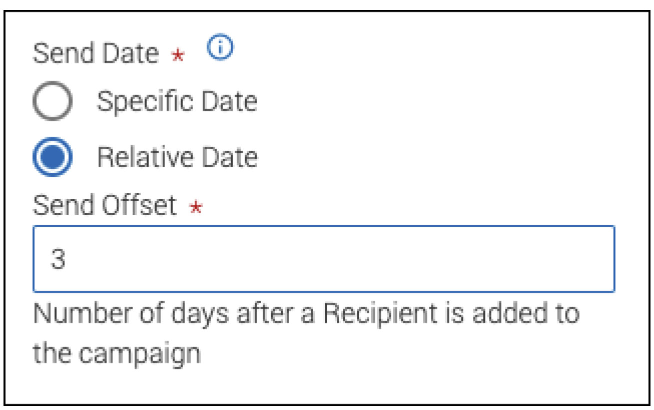
SMS nudges for Appointment Campaigns are automatically generated. Set a send date, and click **Save Nudge**. Note that you may only send out one nudge a day. You may continue creating nudges after this.

For nudges that are sent after the welcome message, you can send the nudge on a specific date or a relative date. Follow-up nudge messages are only sent to students who have not scheduled their campaign appointments.

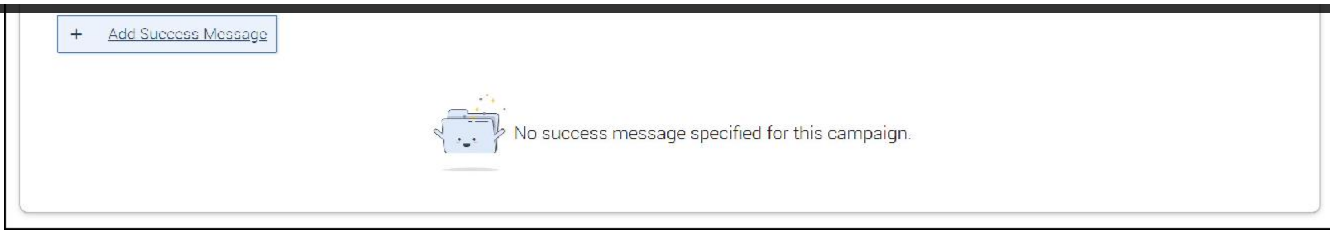


Sending on a specific date is more useful if you have a narrow, time-bound campaign that will not add many (if any) new students. If a student is added after a specific date nudge, they do not receive the nudge.

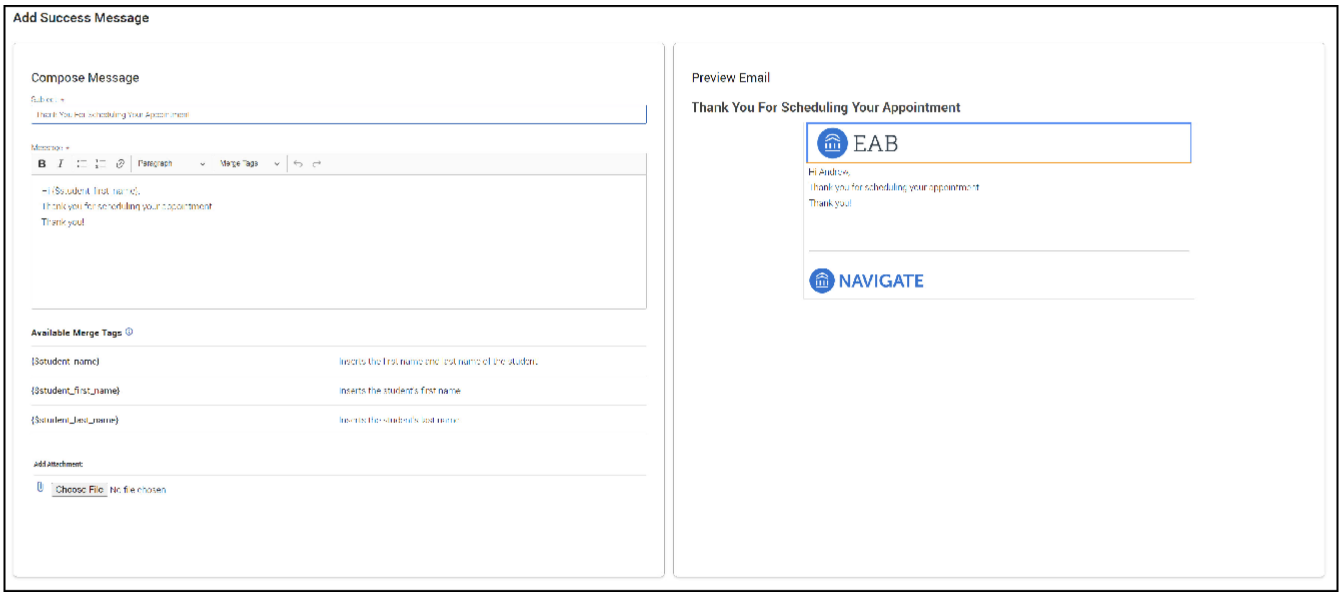
A relative date may be more helpful if you are using an automated action to add students to the campaign, or if you will be adding new students to a campaign regularly. This allows you to send a nudge X number of days after being added to the campaign based on what you enter in the *Send Offset* field.



You can also create a Success Message on the Nudges step of an Appointment Campaign. This is an email or SMS message sent the day after the recipient schedules all appointments for the campaign. It is for communication purposes only. Click **Add Success Message** to start creating a Success Message.



The **Add Success Message** page is like the Add Nudge page; however, there is no Send Date because the Success Message only sends after the student schedules an appointment. You may also use merge tags when writing your Success Message.

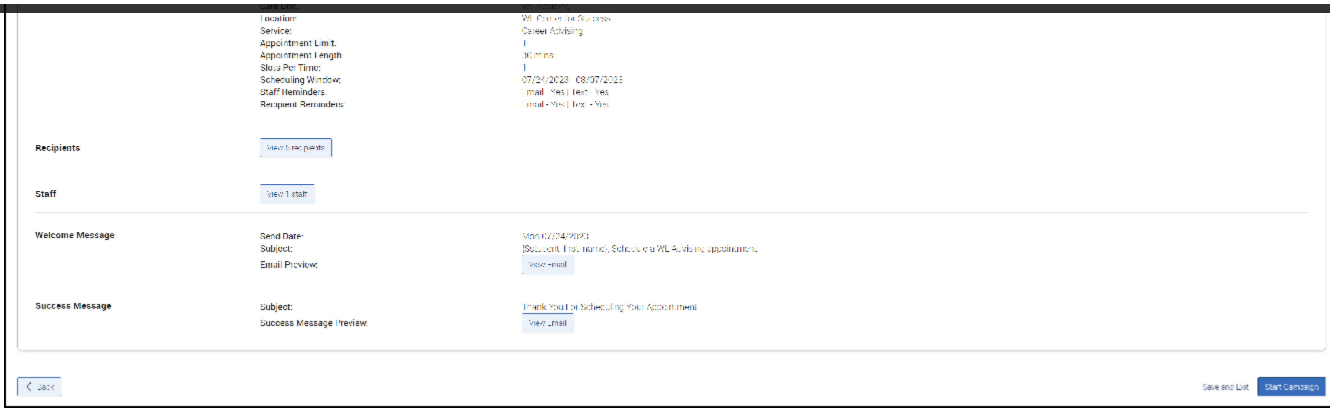


After you have finished composing your message, it's time to send out your campaign!

Verify and Start

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

Navigate360



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

Launching an Enrollment Campaign

Intro: This workflow guide covers how to create and launch an Enrollment Campaign. These campaigns are intended to be used by staff for outreach that helps enroll more students on time. Enrollment Campaigns allow staff to identify students that have not yet enrolled in an upcoming term, send those students a personalized message, track click to open rate, and track if those students are enrolled in the upcoming term.

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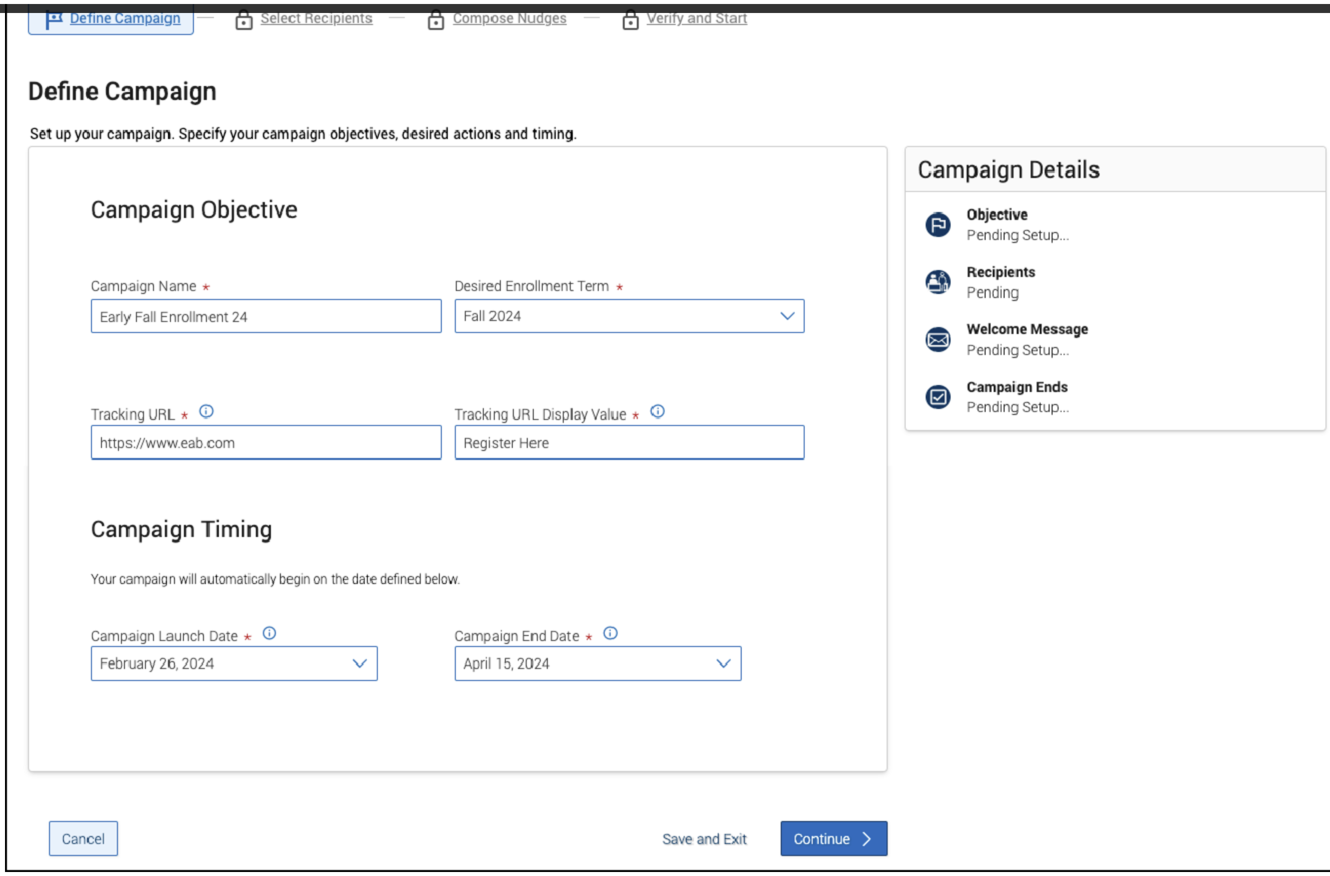
Launching an Enrollment Campaign

To begin, open the **Campaigns** page and click the **Add New** button in the **Enrollment Campaigns** section. The **New Enrollment Campaign** page opens.

Define the Campaign

Define the Enrollment Campaign much as you would other student-facing campaign types. Enter the Campaign Name, Desired Enrollment Term, Tracking URL, Tracking URL Display Value, and the Campaign Launch and End Dates.



Campaign Name

Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but is not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

Desired Enrollment Term

The Term you are trying to enroll students in.

Tracking URL

The URL you want students to click. This can be any URL, but you probably want it to take students directly to a registration site.

Tracking URL Display Value

The text students will see in the email message encouraging them to enroll. When students click the text, they go to the Tracking URL

Campaign Launch Date

The date the Enrollment Campaign starts.

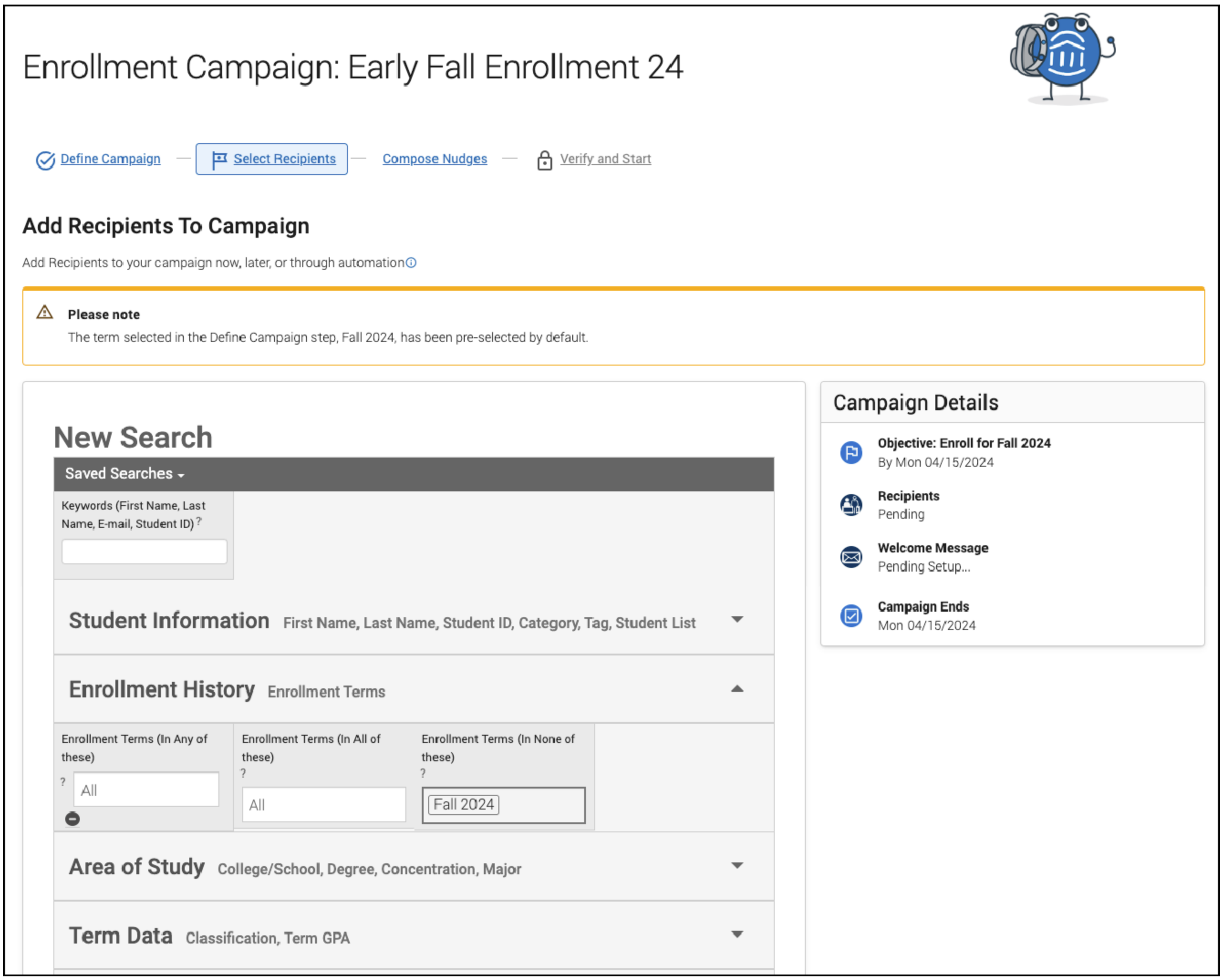
Campaign End Date

The date the Enrollment Campaign ends.

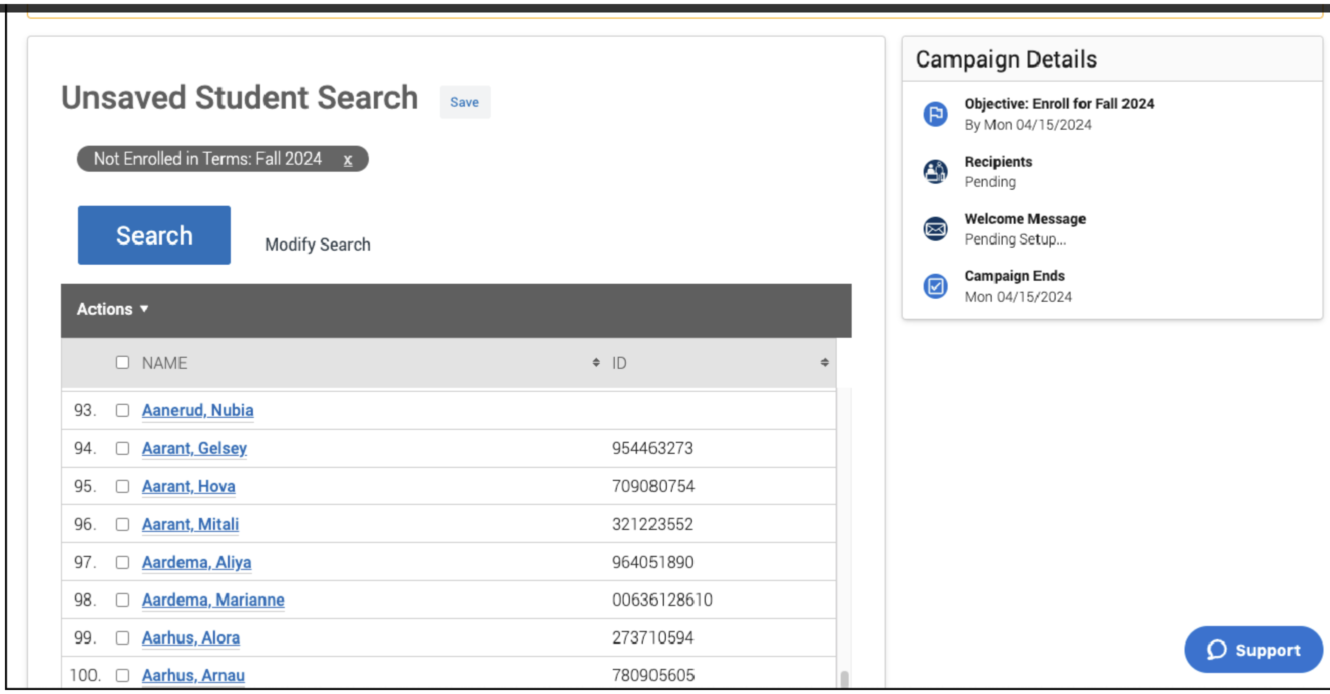
Add Students to Campaign

The next step is performing a search to find recipients for the campaign, unless you plan to use a campaign automation. If you plan to use an automation to add students to the campaign, skip this step.

If you are adding students via a search, set your criteria and perform the Advanced Search. The search results page appears. The term selected in the Define Campaign step is pre-selected by default for the search.

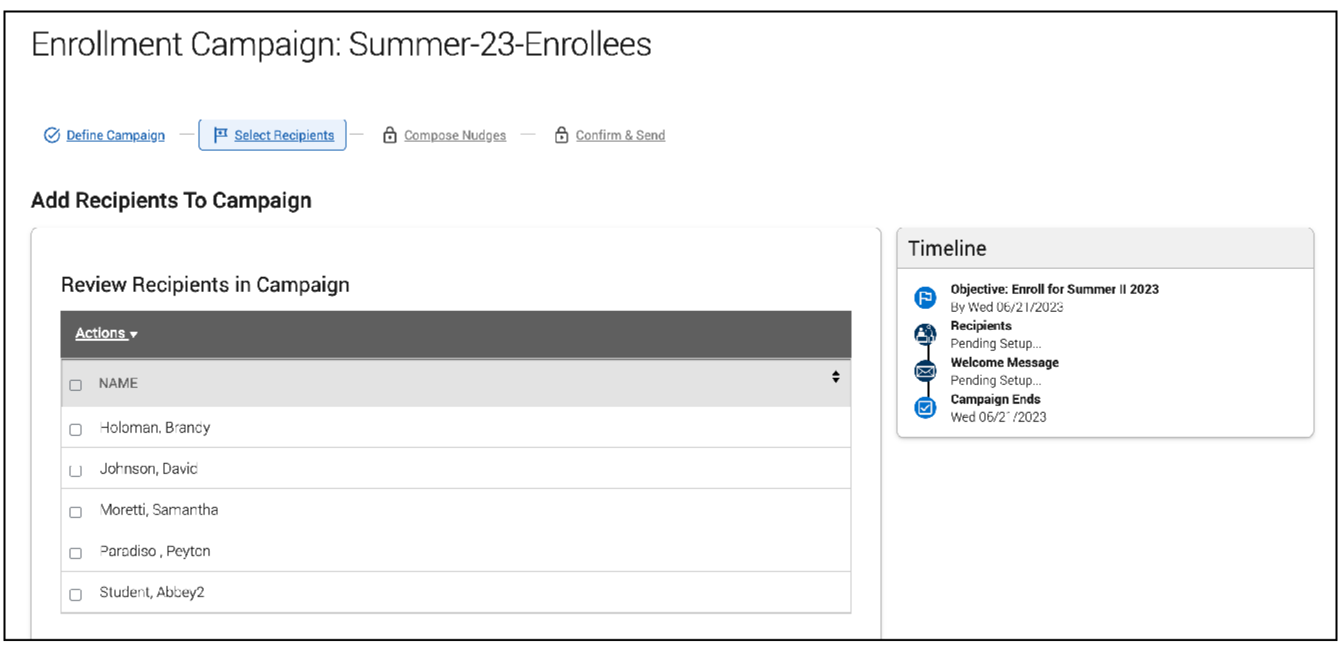


The search results page appears.



Select the students to add to the campaign and click **Continue.** You may also save this search if you want.

Review the students on the next page. To add more students to the campaign, click **Add More Students.** If a student should not be in the campaign, select the box next to their name and choose **Remove Students from Campaign** from the **Actions** menu.

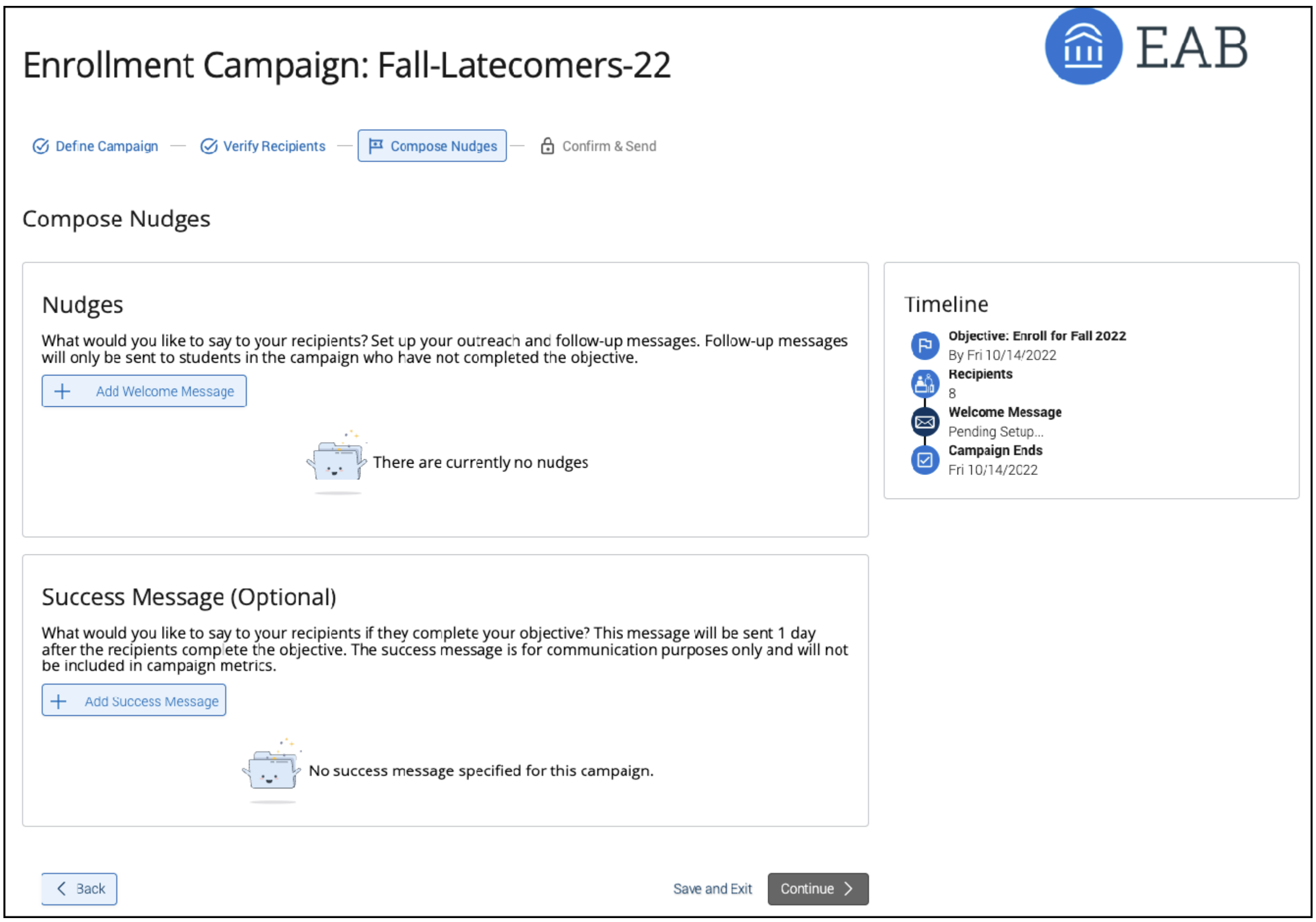


Once finished, click **Continue.**

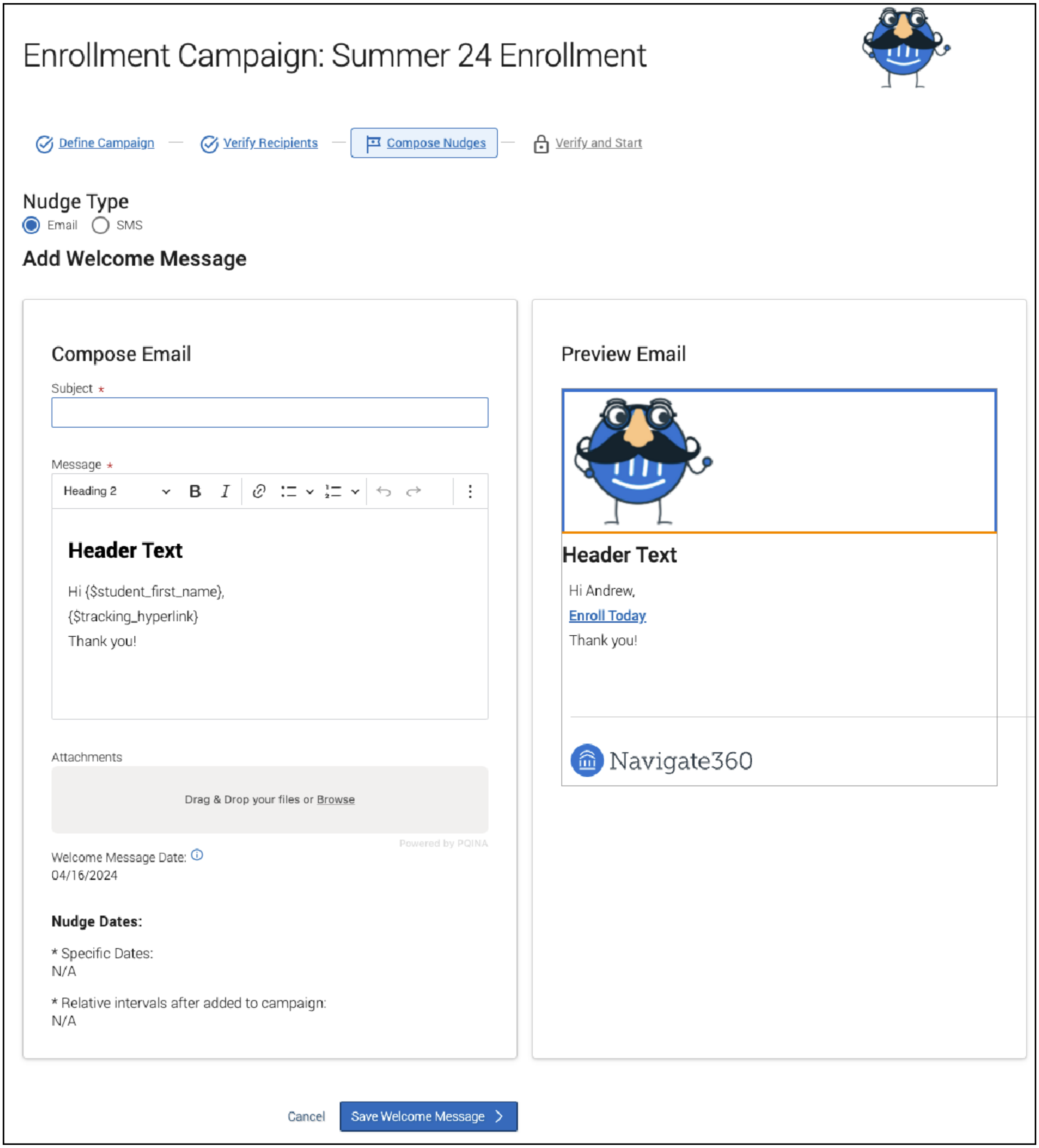
> **Note.** Welcome messages are the first nudge sent to students. They send at the start of the campaign or immediately after a student is added to the campaign (either by manually adding the student later or via a campaign automation).

Nudges allow for more communication from your school to students during an Enrollment Campaign. Each nudge is an email or SMS sent to your campaign list. Welcome messages send immediately after starting the campaign or after a student is added to the campaign manually or via an automation. Other nudge message are sent the morning of the date chosen when you create the nudge. Some may be slightly delayed, as with any large transmission. You can customize each message sent to the student; however, the link and link text will always be the URL and text set in the first step of the Enrollment Campaign.

To create your nudges, go to the **Compose Nudges** page.



Click **Add Welcome Message** to create your first nudge.



For email messages, select the *Email* nudge type. Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel. You can also attach a file to this message.

Fields used in email message composition are:

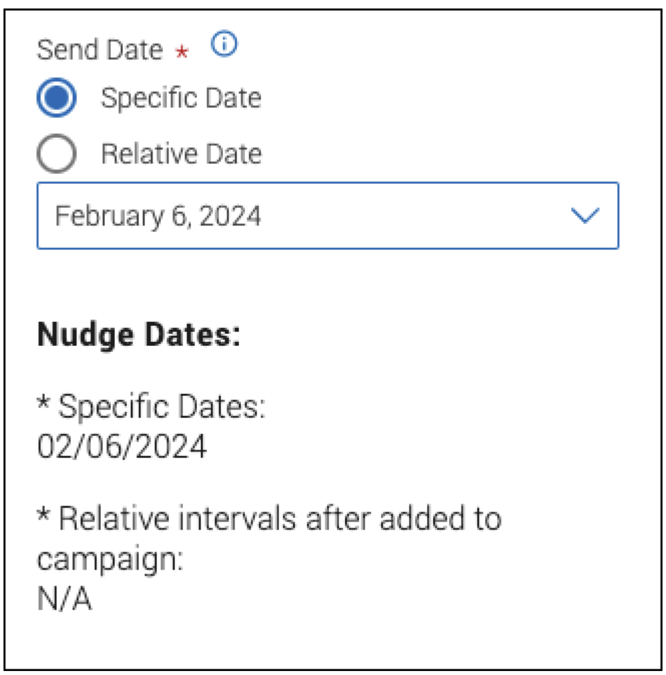
The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date

The date the nudge is sent. This field does not appear when creating the Welcome Message, as the nudge will send immediately after starting the campaign. If you set the campaign start date for the next day or after, the first nudge sends at 10 AM Central Time of the date set. If you add students later, the send date will be immediately after they are added to the campaign. For non-Welcome Message nudges, you can send a message on a Specific Date or a Relative Date.

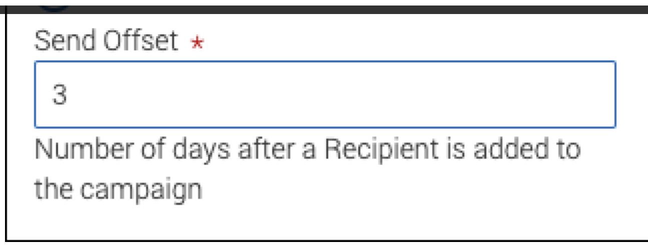
After creating a nudge, click **Save Welcome Message/Save Nudge** to continue. You may continue creating nudges after this.

For nudges that are sent after the welcome message, you can send the nudge on a specific date or a relative date.

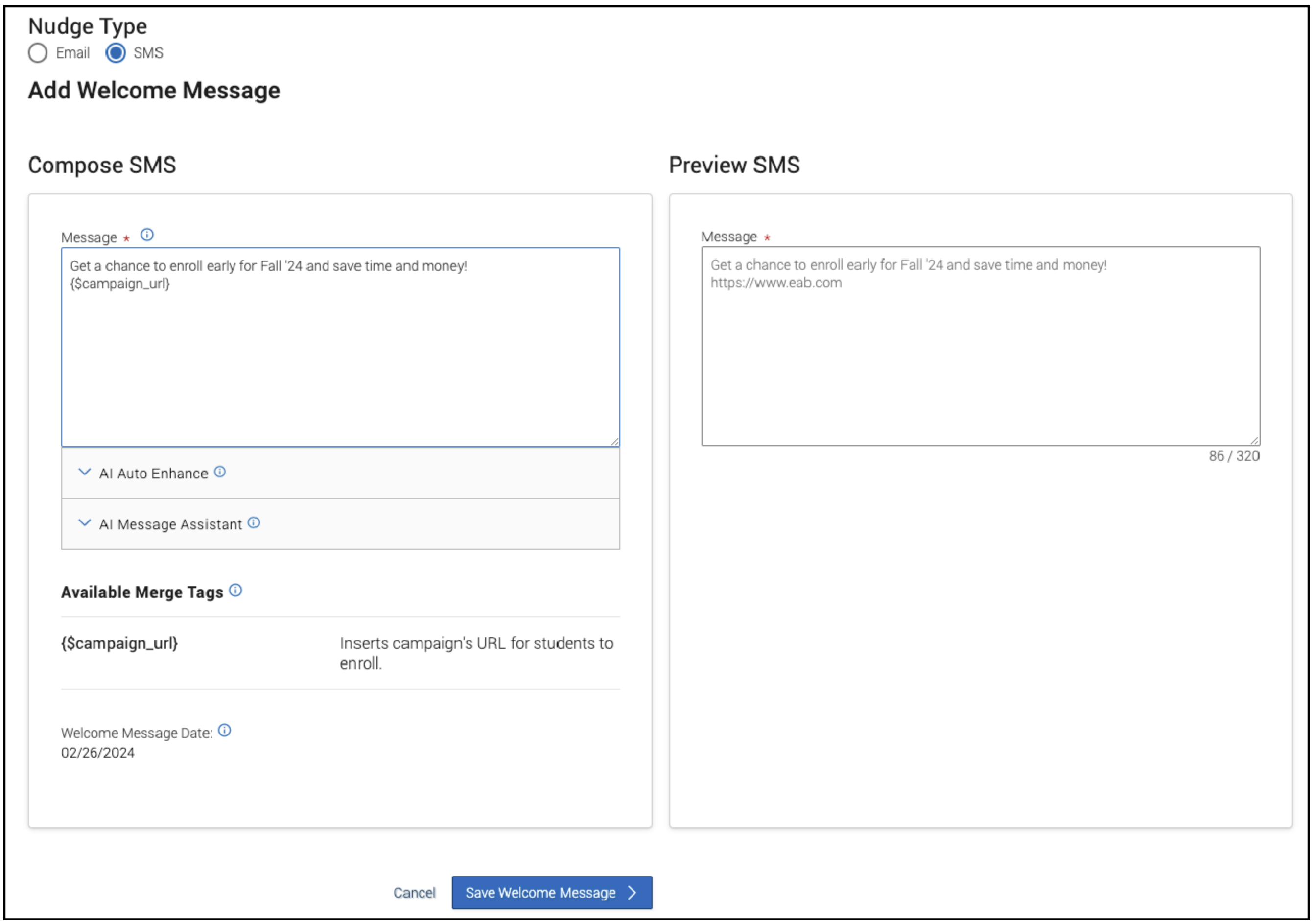


Sending on a specific date is more useful if you have a narrow, time-bound campaign that will add many (if any) new students. If a student is added after a specific date nudge, they do not receive the nudge.

A relative date may be more helpful if you are using an automated action to add students to the campaign, or if you will be adding new students to a campaign regularly. This allows you to send a nudge X number of days after being added to the campaign based on what you enter in the *Send Offset* field.

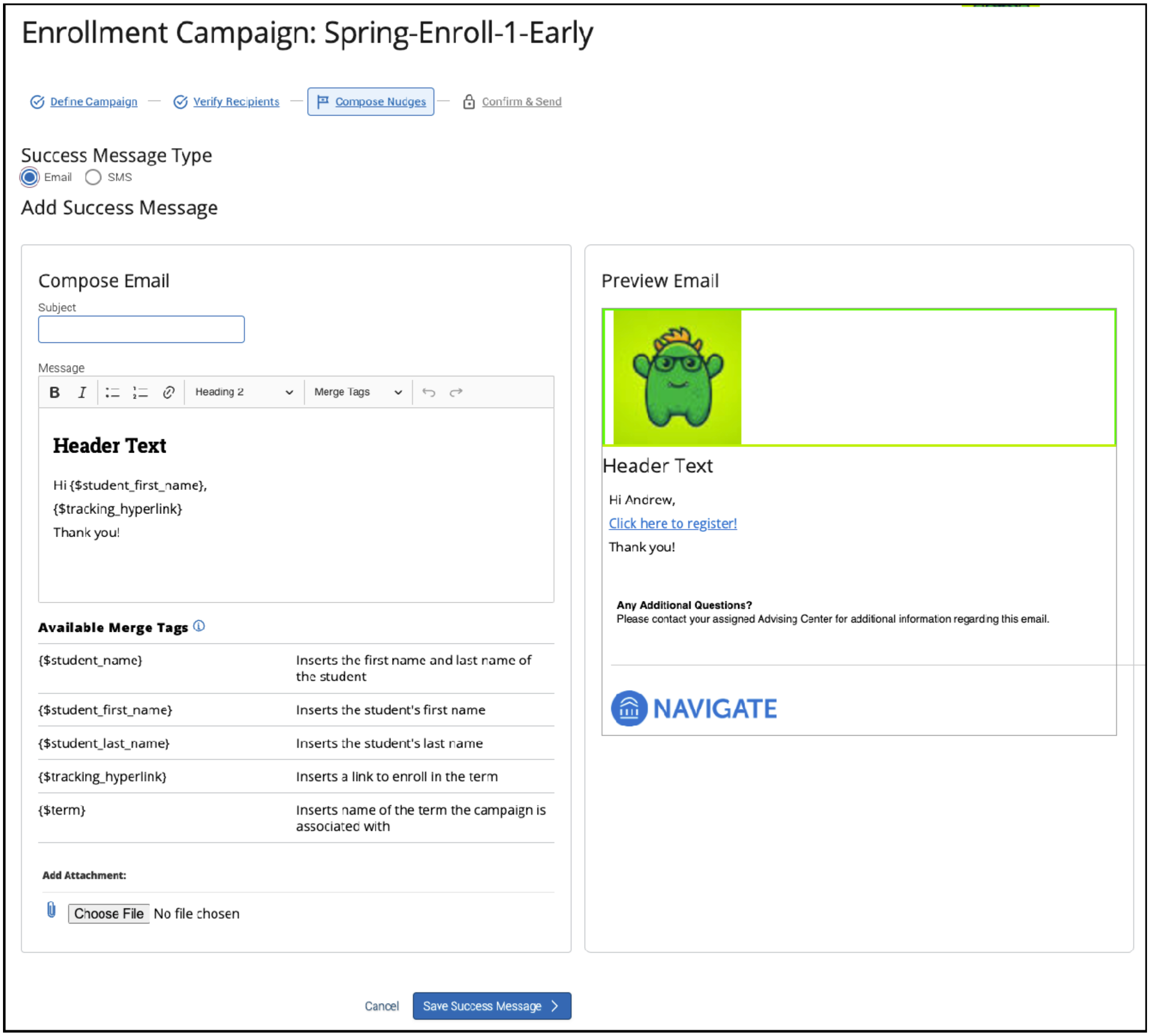


For an SMS, select the *SMS* nudge type. A similar page with more limited options displays.



SMS nudges are limited to 320 characters. The only merge tag is {$campaign_url}, which inserts the ampaign URL added in step one. Create your message, set a send date, and click **Save Welcome essage** to save the nudge.

You may continue creating nudges after this. One nudge a day can be sent of one nudge type, so you can send, for example, an email Welcome Message first, and then follow up 3 days later with an SMS nudge, send an email nudge the day after that, and then another SMS nudge the day after that.



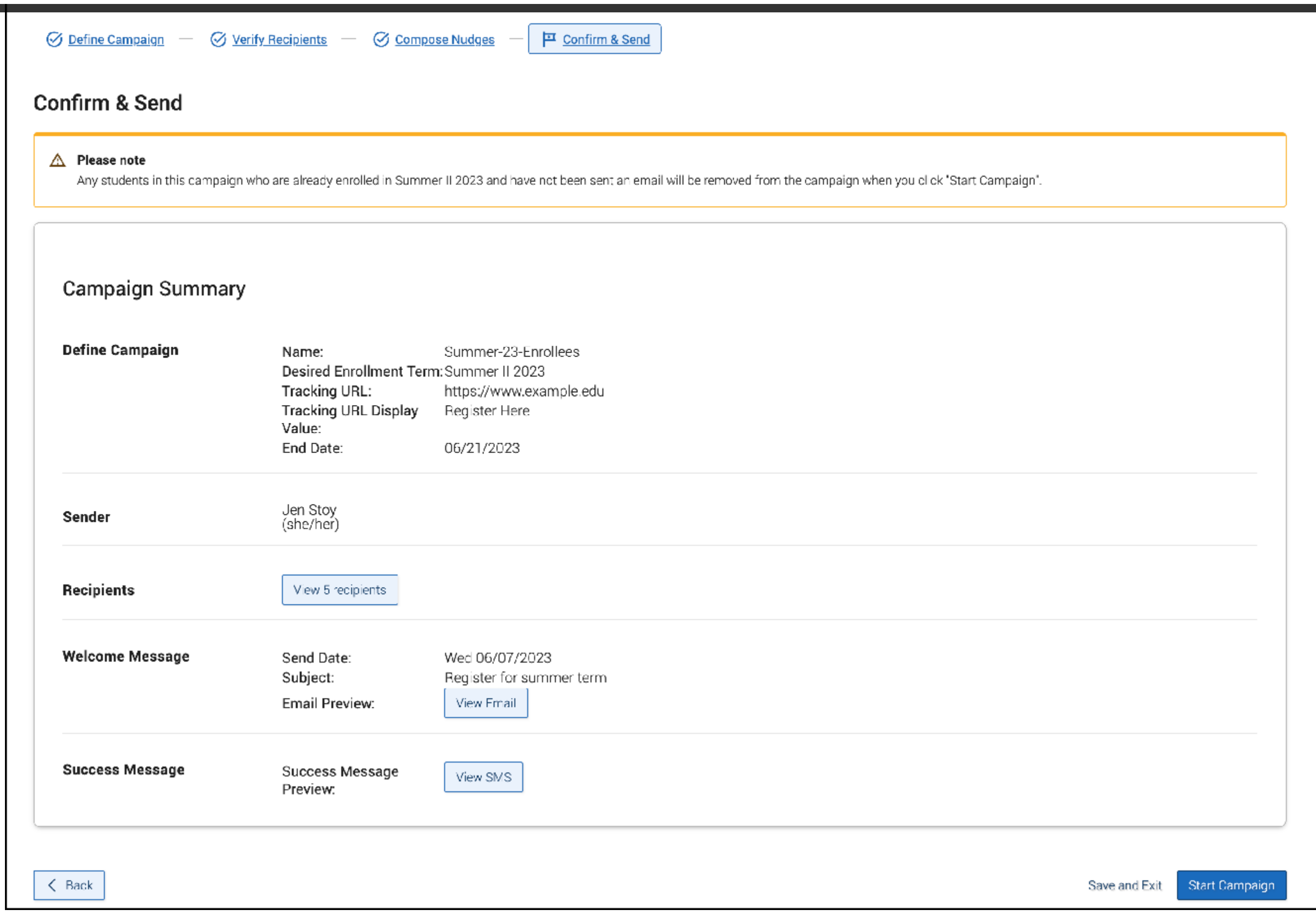
The **Add Success Message** page is like the Add Nudge page; however, there is no Send Date because the Success Message only sends after the student completes the objective. You may also use merge tags when writing your Success Message if the success message is an email.

After you finish creating Nudges, click **Continue** to go to the Confirm & Send page.

Confirm and Send

The last page is a **Confirm and Send** page. You can review all elements of your Enrollment Campaign and once you are satisfied it's correct, send the campaign to your students. If there is an

Navigate360



Note. Any students who are already enrolled in the term targeted for the campaign are removed from your list when you click **Start Campaign**.