

Appointment Campaign Best Practices

Appointment Campaigns are great for target outreach to a known cohort of students to prompt scheduling appointments for a specific reason. Learn how to launch an Appointment Campaign and learn about other features in CU Navigate in <u>Tiger Training</u>.

Creating Availability

When creating a campaign, availability must be created first. Campaigns are not limited by location settings. Here are some key best practices and recommendations when creating availability:

- Time and date ranges should be long enough to ensure enough openings for students to schedule.
- Designate the availability for campaigns only.
- If creating availability for virtual appointments, create a Zoom or Teams link exclusive to your appointments.
- Special instructions for the Student section:
 - Special instructions only appear in the appointment confirmation and reminder emails. Include any specific requirements or rules for the meeting.



Creating an Appointment Campaign

Appointment campaign configurations allow for more options and flexibility than standard appointment availability. Here are some key best practices and recommendations when creating an appointment campaign:

- Utilize the "Instructions or Notes for Landing Page" with contact information.
- Set the appointment limit to 1 so students do not receive additional messaging after they have scheduled/attended an appointment.
- Do not allow scheduling over courses.
- Turn off Staff Reminders to lower the number of notifications received.
- Set the Launch Date to the day the campaign set-up will be completed.

Campaign Configurations

Campaign Name \star			Instructions or Notes for Landing Page:	
Summer 2025 First Year Orientation Advising			If you cannot find an appointment that works f	or you, please cont
Care Unit: *			Location: *	
Academic Advising	×	\sim	Academic Success Center	× ~
Service: *				
First Year Orientation Advising	×	\sim		

Appointment Configurations

Appointment Limit: *				Appointment Length: *				
1		×	\sim	30 min	×	\sim		
Slots Per Time: *								
1		×	\sim					
Allow Scheduling Over (Courses							
Staff Reminders:	Recipient Reminders: Email Text							

Creating Appointment Campaign Messaging

Appointment campaign messaging configurations can be set for Welcome Messages, Nudges, and Success Messages. Appointment campaigns require Welcome Messages be created. Here are some key best practices and recommendations when creating appointment campaign messages.

Welcome Messages - Required

Welcome messages ask the recipient to complete an action (schedule an appointment). Recipients are more likely to act if the message is:

- Short and concise
- Use terms the recipient has received in previous messaging
- The scheduling link is viewable and not buried under information
- Does not include jargon
- Lets the recipient know what will happen after they schedule the appointment (appointment confirmation, follow-up information about the appointment)

Compose Message

💛 Apply a Ter	mplate 🛈												
Subject *													
{\$student_first_r	iame}, Schedi	ule an Ao	cademic	Advising	g appo	ointm	ent						
Message *													
Paragraph	~ A ~	<u>A</u> ~	A⁼ ~	Al ~	в	Ι	Ø	:= •	2 1 <u>-</u>	~	≣ ~	¢	<i>⇔</i> :
Hello (Sstuden Please schedul so, please click an email confir (Sschedule link	t first name) e an appointr the following ming the appo	: nent for link, sel pintmen	First Ye lect a tim	ar Orient ne that w nd details	ation vorks s.	Advis with y	ing a' our s	t the Ac	adem e, and	ic Su click	ccess Save. `	Center. You will	To do receive
Thank you!	2												
Clemson Tiger													
✓ Enhance w	ith AI 🛈												

Nudges - Optional

Nudges remind the recipient they have not completed the requested action. Nudges can be sent as emails or texts. Recipients are more likely to respond if the following is done:

- Include a time-sensitive subject (ex: "Deadline Approaching")
- Include a due date in the message
- Use terms the recipient has received in previous messaging
- The scheduling link is viewable and not buried under information.
- Use text messaging as the deadline approaches



Message * 🛈

Hello! You have not yet scheduled and completed your Orientation advising appointment which can prevent you from registering for classes at Orientation. Check your Clemson email for details to schedule your appointment or click {Sschedule link} to schedule.

Success Message – Optional (Recommended)

Success Messages are sent to the recipient after they have completed the requested action (schedule appointment). Recipients will receive both the success message and appointment confirmation after the appointment is made. The success message is the best place to include the following:

- Reminder to keep this email
- What will be discussed in the meeting
- Actions required before the appointment (completed advising worksheet, placement tests, sending in test scores and other institutions credits, what to prepare)
- Reference back to where information can be found (admissions portal, virtual orientation, websites)
- Technology requirements (Zoom/Teams, VPN/CUApps)
- Late or no-show policies and cancellations
- Contact information
- Attached documents (what they are and if they need action)

Subject *					
Thank You For Scheduling Your Appointment					
Aessage *					
Paragraph $\vee \mathbf{A} \vee \mathbf{A} \vee \mathbf{A}^{\Xi} \vee \mathbf{A}^{\dagger} \vee \mathbf{B} T \mathcal{D} := \vee := \vee := \vee :=$					
Hi {S <u>student_first_name}</u> ,					
Thank you for scheduling your appointment! Please review the information below to prepare					
for your academic advising appointment.					
 The appointment will take place over Zoom (the meeting link is in the appointment confirmation) Connect from a screen larger than a mobile <u>phone</u> if possible, as I will be sharing my screen. Connect from a quiet location, free from distractions. Click <u>here</u> for information for Clemson Zoom downloads and information Download the <u>Clemson Virtual Private Network (VPN</u>) and get comfortable using it. You will not be able to connect to iRoar without it. During this meeting, we will discuss courses for the upcoming semester and the next steps for registration. We will not register for courses. Here are some things you can do to ensure you and I are best prepared for your appointment: Review the Virtual Orientation modules (major, iRoar, and registration modules) and bring a list of questions not answered in the modules to the appointment Send any AP/IB/A Level scores, dual enrollment and/or transfer credits (must be sent from the institution at which they were taken), and or SAT/ACT scores you have not already submitted. Complete the <u>Clemson Mathematics Placement Test (CMPT</u>) if required. Complete the <u>Modern Language Placement Test (MLPT</u>) if required. Remember, advising appointments are for students only. I know your parents, friends, loved ones, and pets may want to attend with you, but this meeting is 1 on 1 and is great practice for your future college appointments/meetings. In the meantime, please let me know if you have any questions. I look forward to meeting you! Thank you! 					

CU Navigate Messaging Tools

CU Navigate has two features to assist with student communications: Content Templates and Message Content Creator.

Content Templates

Content Templates allow users to create a library of reusable templates that can be saved for frequent communications. Templates can be used in any feature with an option to message students.

To create a Content Template, click the **User Menu > Content Templates**. Then click **Add Template.**



To use a Content Template, click **Apply Template**, select your template, then click **Update**. Messages can be edited after the template is applied.

	^ Apply a Template 🛈	
l t	Note: Loading a template w the header and footer config	ill overwrite any content you have entered as well as use gured within the template chosen.
	Templates 🛈	
	Select Template	Update
	Default Header & Footer	es
_	My Templates	
J	ASC Tutoring No- Show	
e	Public Templates	
	Advisor Outreach -	

Message Content Creator

The Message Content Creator is an embedded AI assistant that helps improve message content, including tone, length, and clarity. It can be used to create messaging or enhance current messaging. This tool is accessible wherever users create messages, such as Send a Message, Appointment Campaigns, and Content Templates.

Under any message box, click Enhance with AI, to open the options. Click Enhance.

^ 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 Clemson University will record and maintain a transcript of this interaction. For further information about our information practices, please see our Privacy Policy <u>here</u> . Al systems are not perfect and may make mistakes. Please review the message carefully You are responsible for the messages you send.	
Enhance	

A box will open that displays the original message (if provided) and the enhanced message. There are options to use the message, keep the original message or regenerate it.

Driginal Message	Enhanced Message	< Version History
Hello Clemson Tiger,	Hey Clemson Tiger,	
Please schedule your advising appointment by the end of next week!	It's time to set up that advising appointment! end of next week.	Make sure to book a slot with me by the
look forward to meeting with you! 'our advisor	Here's why it's important:	
	 Get answers to any questions you've got Plan your path ahead and set yourself up Chat about any concerns or ideas you m 	about your courses. for success. ight have.
	Can't wait to catch up and help you on your jo	ourney!
	See you soon, Your advisor	

Preview Enhanced Message