



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 [Tiger Training](#).

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.

Special Instructions for Student

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Virtual Appointments (use the link below to connect at the time of your appointment):

- Please log in from a computer or a device larger with a screen than a mobile phone
- Please present and free of distractions during your advising appointment. Do not login to your advising appointment in moving vehicles or in noisy public spaces.
- If you are unable to attend the appointment or not able to connect in a quiet space, please reschedule your appointment.

Please note that there will be a five-minute grace period. After that, depending on other scheduling constraints, you **may** be asked to reschedule.

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 *

Summer 2025 First Year Orientation Advising

Instructions or Notes for Landing Page:

If you cannot find an appointment that works for you, please cont

Care Unit: *

Academic Advising



Location: *

Academic Success Center



Service: *

First Year Orientation Advising



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

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 Template ⓘ

Subject *

{Sstudent_first_name}, Schedule an Academic Advising appointment

Message *

Paragraph ▼ **A** ▼ A ▼ A² ▼ AI ▼ **B** *I* | @ |:: ▼ |½= ▼ |≡ ▼ |↶ ↷ |⋮

Please Schedule Your Academic Advising Appointment.

Hello {Sstudent_first_name}:

Please schedule an appointment for First Year Orientation Advising at the Academic Success 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.

{Sschedule_link}

Thank you!

Clemson Tiger

▼ Enhance with 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 *

Heading 2 ▾ **A** ▾ A ▾ A[≡] ▾ A[↑] ▾ **B** *I* | @ := ▾ | ⋮

Deadline Approaching Schedule Your Academic Advising Appointment.

Hello {Sstudent_first_name}:

Please schedule an appointment by July 18 for First Year Orientation Advising at Academic Success Center to be able to register for courses. 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.

{Sschedule_link}

Thank you!

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.

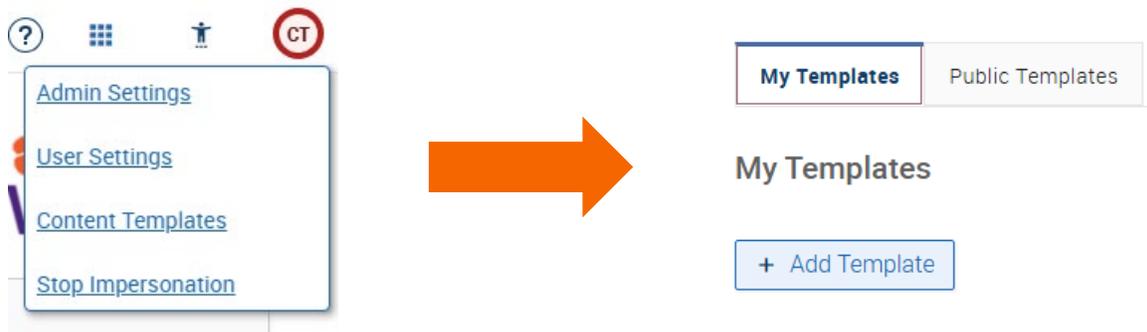
CU Navigate Messaging Tools

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

Content Templates

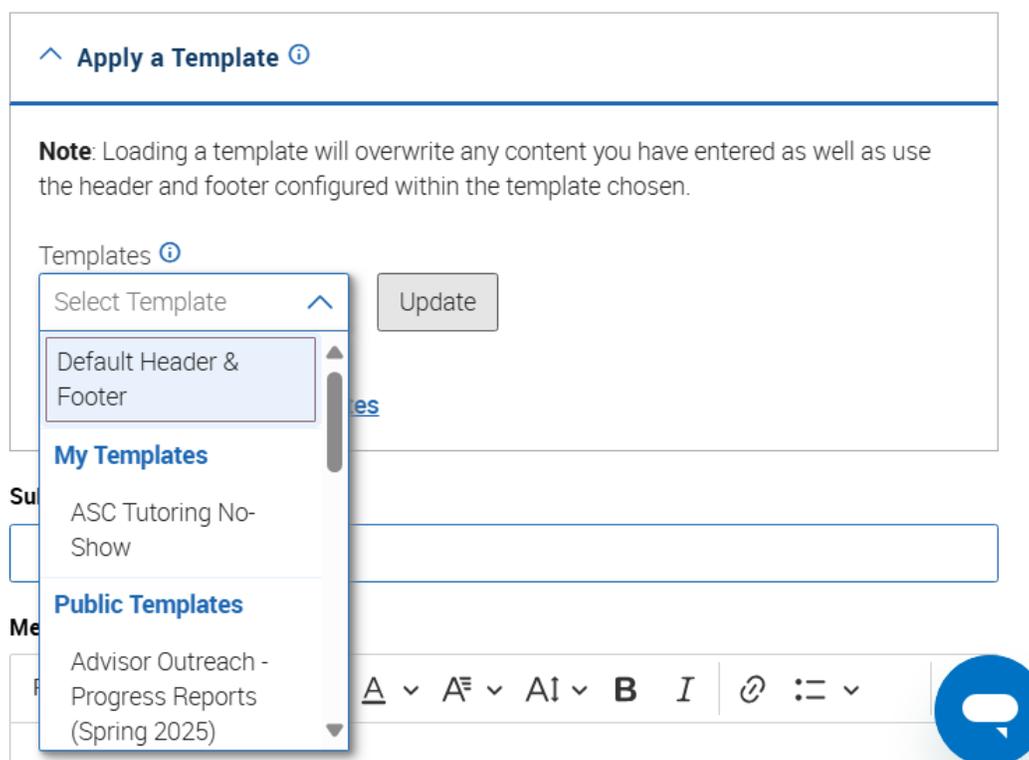
Content Templates allow users to create a library of reusable templates that can be saved for frequent communications. Templates can be used in any feature with an option to message students.

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.

To: Clemson Tiger



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 ⓘ

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 [here](#). AI 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.

Preview Enhanced Message

Prompt

Original Message

Hello Clemson Tiger,
Please schedule your advising appointment by the end of next week!
I look forward to meeting with you!
Your advisor

Enhanced Message

Hey Clemson Tiger,
It's time to set up that advising appointment! Make sure to book a slot with me by the end of next week.
Here's why it's important:

- Get answers to any questions you've got about your courses.
- Plan your path ahead and set yourself up for success.
- Chat about any concerns or ideas you might have.

Can't wait to catch up and help you on your journey!
See you soon,
Your advisor

Use Enhanced

Keep Original