

Appointment Campaigns in MavCONNECT

General Overview:

Appointment Campaigns allow staff to:

- 1) send a message and **appointment request** to a group of students and
- 2) **track** appointment scheduling and engagement (at-a-glance stats!)
- 3) send **automated 'nudges'** to campaign students who haven't scheduled via the campaign

This guide will show you how to set up an Appointment Campaign and provide best practices for doing so.

Things to consider before setting up an Appointment Campaign

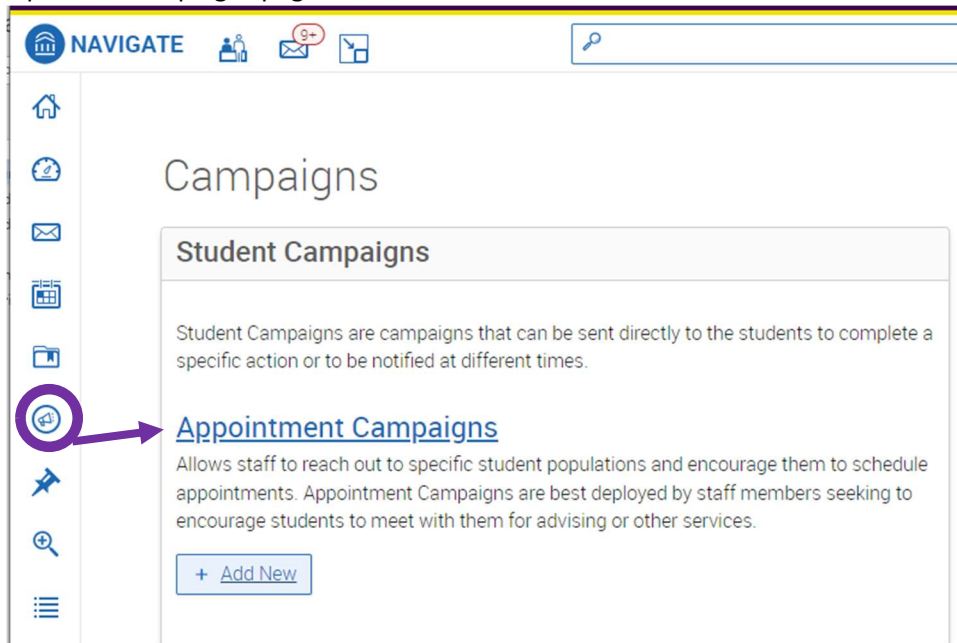
- Who are your target students?
- What is the timeframe of your campaign? (The dates during which your appointment campaign link will be active to students, and the dates during which nudges can be sent.)
- What type of campaign/appointment service would you like to plan for?
 - You can only choose ONE appointment service type per campaign.
- How long do you want the appointments to be?
 - For campaigns, you can choose the Appointment Length you desire – NOTE: it can be *different* than your standard default appointment length settings.
- Have all staff who are to be receiving appointments via the campaign set up the appropriate Availability and Appointment Service, with “Campaign” chosen in the Availability build?
- Who will be launching this campaign? A single staff person can be the campaign creator and will have the ability to add other staff to the campaign. You do not need to each launch your own campaigns unless that is desired.

Important things to note:

- Appointment Campaign configurations override ALL settings at the location level **EXCEPT** the *Number of Hours Ahead of Time Students are Allowed to Schedule an Appointment* setting.
 - This means: if your normal default appointment length is 45 minutes (as configured by MavCONNECT staff in the back-end), but you put in 30 minutes as the appointment length in your Appointment Campaign configurations, students will set up appointments for 30 minute durations *if* scheduling via the campaign. If they happen to schedule with you via the standard student scheduler they will be scheduled via the normal default appointment length.
- There is an option to “Allow Scheduling Over Courses”. This applies to *Instructors*. In most cases it would NOT be appropriate to check this box, unless you are an instructor connected to multiple lab classes on campus but are not actually teaching at those times. Then, you may want to check this box so that students can schedule at the same time as your courses, but beware, this applies to all courses.
- Once you have launched your campaign, you will be able to return to it to easily see who has / has not yet scheduled and so on. You can also adjust other campaign items like nudges, etc.
- You will also be able to associate “eligible appointments” with the campaign, even if they were made outside of the campaign via the “Eligible Appointments” tab. This can help with metrics.

Launch an Appointment Campaign

1. Open the Campaigns page and select "Add New"



2. Set the **criteria** for the Appointment campaign then click continue.
 - a. **Campaign Name:** Visible to person creating the campaign and others who have access to view. Not visible to students.
 - i. NOTE: Start the Campaign Name with the most important info, like Academic Term. Some formats could include: Term, Population, Purpose; Term, Population, College, Purpose; Term, College, Purpose, Last name of user who created the campaign. Examples include: "SPR24 Freshmen Reg Campaign", "F25 1st Time Freshmen Business 15-to-finish", or "SPR24 Freshmen Bio Major Decl, J. Smith"
 - b. **Instructions/Notes for Landing page:** The instructions for students when they open the campaign link.
 - c. **Care Unit:** Your home Care Unit
 - d. **Location:** Your MavCONNECT Location
 - e. **Service:** Choose the Appointment Service (reason) you want associated with this campaign. I.e. the appointment reason students will sign up for. Only one Appointment Service can be chosen for a campaign.
 - f. **Course or Reason:** This option will only show up for those Appointment Services which have a course attached to them, such as BUS 295 Advising Appt
 - g. **Appointment Limit:** How many appointments you want students to schedule for this appointment service during this campaign. In most cases, this will likely be 1 appointment.
 - h. **Appointment Length:** How long the campaign appointment will be. Multiple durations available. This appt length will OVERWRITE the default appointment time length designated via the location configurations (determined by you and managed by the application administrators)
 - i. Faculty / Instructors: Your appointment service options have time lengths built into the appt name, so please be sure to choose the appt length here which matches your appt service name.
 - i. **Slots per Time:** Appointments can be individual or group. By adding more than one 'slot per time' you can have a group appointment. Max number is 500.
 - j. **Campaign Reminders:** Please choose email. Texting is not currently an option.
 - k. **Scheduling Window:** The dates when campaign appointments can be scheduled. Your campaign officially begins on the date of your first nudge.
 - l. **HIT CONTINUE**

Define Campaign

Set up your campaign. Specify your appointment details and timing.

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:

Campaign Details

- P **Objective: Schedule Appointment(s)**
By Mon 02/19/2024
- P **Recipients**
1
- P **Staff**
Pending Setup...
- P **Welcome Message**
Pending Setup...
- P **Campaign Ends**
Mon 02/19/2024

Adding students to the Appointment Campaign

- Search** to find recipients for the campaign. You can use the **advanced search** to find specific populations of students, you can search by "Assigned To", or you can use a pre-defined saved *Student List* or *Saved Search* (under the "Student Information Area") (Automation options in this area are coming.)

New Search

Saved Searches ▼

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, Last Login LMS

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"/>
Preferred Name?				Student List (in Any of These)
<input type="text"/>				<input type="text" value="All"/>

- a. Once you have entered in your search criteria, click on **search** to populate a list of students.
 - b. If you would like to send to all students, select the checkbox at the top next to name, this pops up a message that allows you to select all students (circled below).
4. Once you have selected the recipients, click on continue. You can also REMOVE students from this campaign at this point.

Search [Modify Search](#)

Actions ▾

100 items on this page are selected. [Select all 135 items.](#)

NAME ID

Add Recipients To Campaign

Review Recipients in Campaign

Actions ▾

NAME

Scholar, Joe

[Back](#) Add More Recipients Save and Exit [Continue](#)

5. Select Staff for the Campaign menu. Once finished, click “Continue”.
 - a. Staff members who have availability built using the Appointment Service you chose in the first section of this campaign build will be shown here. Ensure that all necessary staff member have built their availability before you build/send the campaign.

Select Staff For Campaign

Available Staff

Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input checked="" type="checkbox"/>	Jill Fischer	For: Campaigns Mon-Fri 8:00am - 5:00pm CT (February 5, 2024 - February 9, 2024)

Add Welcome Message, Nudges, and Success Message

- Nudges allow for more communication from you to students during an Appointment Campaign.
- Each nudge is an email sent from within MavCONNECT to your campaign list.
- Welcome messages send immediately after starting the campaign.
- Other nudge messages are sent the morning of the date chosen when you create the nudge. Some may be slightly delayed, as with any large transmission.

6. Click on “Add Nudge” to create your first nudge / Welcome Message.
 - a. Note: You must create at least one nudge per campaign; however, you can create more.
 - b. You can add an attachment if you like (see bottom of screen)
 - c. Preview your message – there you will see your “Schedule an Appointment” link which will pull in the calendars of the staff members you chose in an earlier step, who must have availability for the Appointment Service you chose.

Appointment Campaign: TEST - Appt Campaign w/ Joe Scholar - Jill created


[Define Campaign](#) —
 [Verify Recipients](#) —
 [Select Staff](#) —
 [Compose Nudges](#) —
 [Verify and Start](#)

Compose Nudges

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ Add Welcome Message



There are currently no nudges

7. For emails, create a subject line and customize the message. A preview of the message shows to the right.

Compose Message

Subject *

{Student_first_name} Schedule an Appointment with XXXX today

Message *

B I [List] [Link] Paragraph Merge Tags [Undo] [Redo]

Hello {Student_first_name}:

We hope your spring term is going well!

We are gearing up for advising, and invite you to please schedule an appointment for **SS - Test Appt type - default time changes** at SS - Student Success Department by February 19. 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. You can also log into MaxCONNECT Students (desktop or app) to find these appointment details.

Thank you, and we look forward to meeting with you!

{Schedule_link}

If you are unable to schedule via this link, please email us at xxxx@mnsu.edu or call our office at xxx-xxx-xxxx.

Available Merge Tags

{Student_name}	Inserts the first name and last name of the student
{Student_first_name}	Inserts the student's first name
{Student_last_name}	Inserts the student's last name
{Schedule_link}	Inserts a link to schedule the appointment
{Email_signature}	Insert your email signature

Add Attachment:

Choose File No file chosen

Welcome Message Date: 02/05/2024


Nudge Dates:

* Specific Dates: N/A

* Relative intervals after added to campaign: N/A

Preview Email

Andrew, Schedule an Appointment with XXXX today!



Please Schedule Your Student Success Department Appointment.

Hello Andrew:

We hope your spring term is going well!

We are gearing up for advising, and invite you to please schedule an appointment for **SS - Test Appt type - default time changes** at SS - Student Success Department by February 19. 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. You can also log into MaxCONNECT Students (desktop or app) to find these appointment details.

Thank you, and we look forward to meeting with you!

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser:
<https://mnsu.campus.eab.com/a/123456>

If you are unable to schedule via this link, please email us at xxxx@mnsu.edu or call our office at xxx-xxx-xxxx.

Want to learn more about this email? Visit your [MaxCONNECT](#) account or the [MaxCONNECT website](#)

8. After you create the nudge message, click on “Save Welcome Message” to continue.
 - a. You can add additional nudges after this step to send reminders to the students who have NOT yet made their appointments.
 - b. Don’t forget to add a “Success Message” if desired!


Compose Nudges

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ [Add Nudge](#)

Welcome Message

Send Date: 02/05/2024 


Email Subject: ({student_first_name}). Schedule an Appointment with XXXX today!

Email Message: Please schedule your Student Success Department...

Success Message (Optional)

What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipient scheduling all campaign appointments or events. The success message is for communication purposes only and will not be included in campaign metrics.

+ [Add Success Message](#)


 No success message specified for this campaign.


- c. You may want to change up the Subject Line, or add “Reminder” etc. Up to you!

Subject *

{Student_first_name}. Schedule a Student Success Department appointment - reminder #1

- d. When building a nudge you will also choose the date you want to send it. It can be a specific date, or it can be a number of days you determine, after the a student is added to the campaign.

 [Choose File](#) | No file chosen

Send Date * 

Specific Date

Relative Date

Send Offset *

5

Number of days after a Recipient is added to the campaign

Nudge Dates:

* Specific Dates:
02/05/2024

* Relative intervals after added to campaign:
N/A

- e. Then hit **SAVE Nudge**
- f. **Repeat** adding nudges as you wish.
- g. **Add a success message** if desired.
- h. **Hit CONTINUE**

Confirm and Send

9. After you have saved your welcome message, nudges, and success message, **review your campaign details, nudges, and recipients**. Once you have confirmed all, click on “Start Campaign” to send the emails to the students.
 - a. If you are sending same day, the messages will be begin to send after clicking “Start Campaign”
 - b. If your campaign begins the next day or after setting it up, the nudge will send after 10AM on that date.
 - c. Your campaign ends when the last message is sent.
 - d. Moving forward, you are able to add students to the campaign, and you will get an option to send the previous ‘nudge’ immediately to the new students. They will also get future nudges as well.

- e. Also – if you have a student who makes an appointment you are trying to track *outside* of the campaign link, you can choose to associate those appointments with the campaign, which may be of help to your tracking/metrics.
- f. Finally, any ‘no shows’ who scheduled via the campaign but then are marked as ‘no shows’ will send that student’s name back into the nudge queue (if your appointment limit is set to 1).

Appointment Campaign: TEST - Appt Campaign w/ Joe Scholar - Jill created



[Define Campaign](#) —
 [Verify Recipients](#) —
 [Select Staff](#) —
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Verify & Start

Campaign Summary

Define Campaign	Name: TEST - Appt Campaign w/ Joe Scholar - Jill created Instructions or Notes for Landing Page: Test of appt campaign with Joe Scholar - where does this appear? Care Unit: Student Success Department Location: 02 - Student Success Department Service: 02 - Test Appt type - default time changed Appointment Limit: 1 Appointment Length: 75 mins Slots Per Time: 1 Scheduling Window: 02/05/2024 - 02/10/2024 Allow Scheduling Over Courses: No Staff Reminders: Email - No Text - No Recipient Reminders: Email - Yes Text - No
Recipients	View 1 recipients
Staff	View 1 staff
Welcome Message	Send Date: Day added Subject: ({Student_first_name}) Schedule an Appointment with XXXX today! Email Preview: View Email
Relative Nudge	Send Date: +5 Days Subject: ({Student_first_name}) Schedule a Student Success Department appointment - reminder #1 Email Preview: View Email
Relative Nudge	Send Date: +5 Days Subject: ({Student_first_name}) Schedule a Student Success Department appointment - reminder #1 Email Preview: View Email
Success Message	Subject: Thank You For Scheduling Your Appointment - TEST Success Message Preview: View Email

[Back](#)

Save and Exit

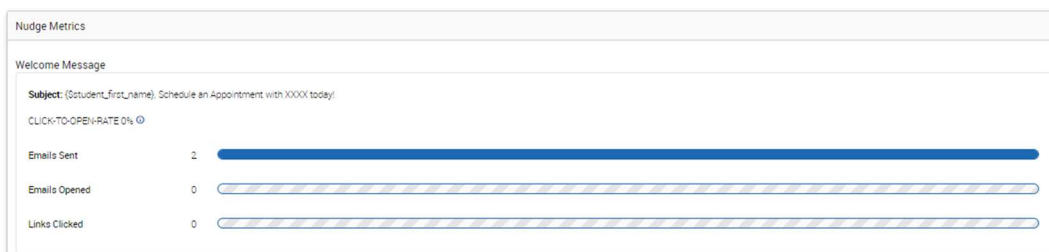
[Start Campaign](#)

Reviewing your campaign – metrics!

Once your campaign has been completed, you can go back to the “Appointment Campaigns” and open up your campaign. This page will open a report with statistics about the performance of your campaign.

Appointment Campaigns > TEST - Appt Campaign w/ Joe Scholar - Jill created

02/05/2024 - 02/19/2024



Reminder re: Student Messages & MavCONNECT:

- Emails sent via an appointment campaign ARE viewable in a student's profile under the "More", "Conversations" area.
- Student Messages ARE tracked in MavCONNECT, so please be aware that others will be able to see the conversation. IF students respond with sensitive information and it is tracking in MavCONNECT please email mavconnect@mnsu.edu to discuss removal of individual student conversations.
- If you do need to stop tracking, in follow up email responses, you will need to delete the MavCONNECT email address for the student.
 - In the "To" field, the email will show as Joe.scholar@mavconnect.mnsu.edu delete this and input the student's normal MNSU-Mankato email: Joe.scholar@mnsu.edu
 - This will stop message tracking in MavCONNECT.