Campaign Instructions

These instructions walk you through how to send a Messaging, Appointment, or Enrollment campaign in Navigate. In order to login and see the campaign feature, you need the appropriate role and permissions. Visit the access site here for more information on requesting access or email navigateinfo@utah.edu with any questions.

Best Practices
After analyzing message open rates, it was determined that campaign communication tailored to the needs of a specific group were most successful. Much higher response rates were observed for campaigns that reach out to smaller groups of students with more relevant, personal outreach instead of a blanket message to a large student population. For example, for non-enrollment outreach, send separate messages to those with advising holds, with non-advising holds, and without holds.

A few other evidence-based practices include:

- **Personalization.** Address students by name and refer to specific actions they need to take.
- **Clarity.** Be clear and actionable. Provide links, deadlines, and support contacts. Keep subject lines engaging, short, and directly related to the needs/tasks trying to be achieved. User formatting tools, such as bullet points and headers, to make the messages easier to scan.
- **Progressive Urgency.** Start with general reminder and gradually move toward direct and urgent communication as the deadline approaches.
- **Supportive Tone.** Maintain a helpful and empathetic tone to reduce stress and increase response rates. Don't focus on negative outcomes and instead focus on what students will gain if they take action, creating a sense of empowerment and opportunity.

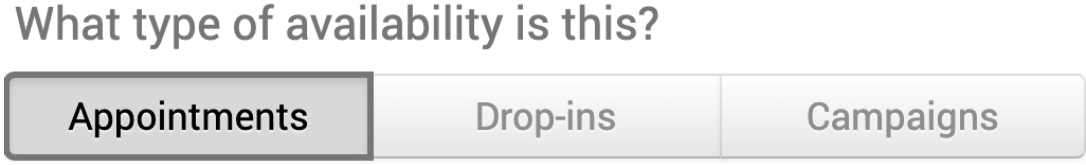
To Send a Messaging or Enrollment Campaign in Navigate:

1. Click the Campaign tab on the left.
2. Click on the desired type of Campaigns or Add New.
3. Name the Campaign with the naming convention "UNIT NAME – PURPOSE – TERM" (Please identify a common unit name, abbreviated if necessary, for your unit for consistency.)
    a. For an Enrollment Campaign, add the Desired Enrollment Term.
4. To track the open rates for a link, paste the link to a relevant site in the Tracking URL field.

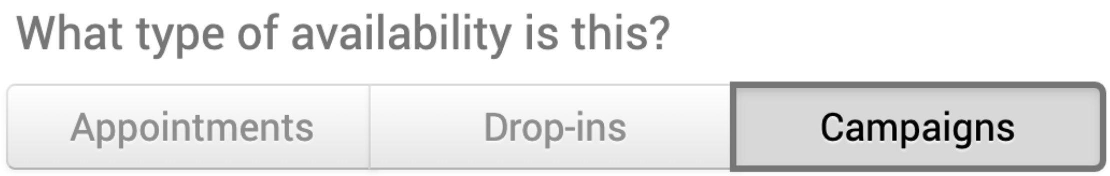
5. Select the Campaign Launch Date.
6. Click Continue.
7. There are 2 ways to identify campaign recipients:
    a. Use the Advanced Search filters to identify students who are eligible to enroll, but who have not yet enrolled.
    b. Create a Student List from another source (UAIR dashboard) and pull that list into the campaign.
8. Scroll down to the bottom and click Include Inactive, if needed.
9. Click Search.
10. Click the box next to Name and then click the blue link that says Select all ____ items.
11. Click Continue.
12. Once again, click the box next to Name and click the blue link that says Select all ___ items.
13. Click Continue.
14. Click Add Welcome Message.
15. Create the message:
    a. Use a template on file by clicking Apply a Template, click Select Template in the drop-down box, and click __.
    b. To save your message as a template, click Browse and Preview Templates under Apply a Template, click + Add Template, use the naming convention "Unit and Purpose," check Make template public if you want others to be able to use this template, fill in the remaining fields, and click Save Template.
    c. Click the Enhance with AI to adapt the tone and length of the message.
16. Review the preview of the message on the right side of the screen to ensure all of the merge tags are coming through correctly.
17. Click Save Welcome Message.
18. Click Continue.
19. Review and click Start Campaign.

To Send an Appointment Campaign in Navigate:

1. Create availability you want associated with the campaign. Anyone with matching availability can be associated with the campaign.
    a. If you want students to be able to schedule through *both* the Student Scheduler (regular scheduling page) *and* the appointment campaign, select Appointments in that line of availability.

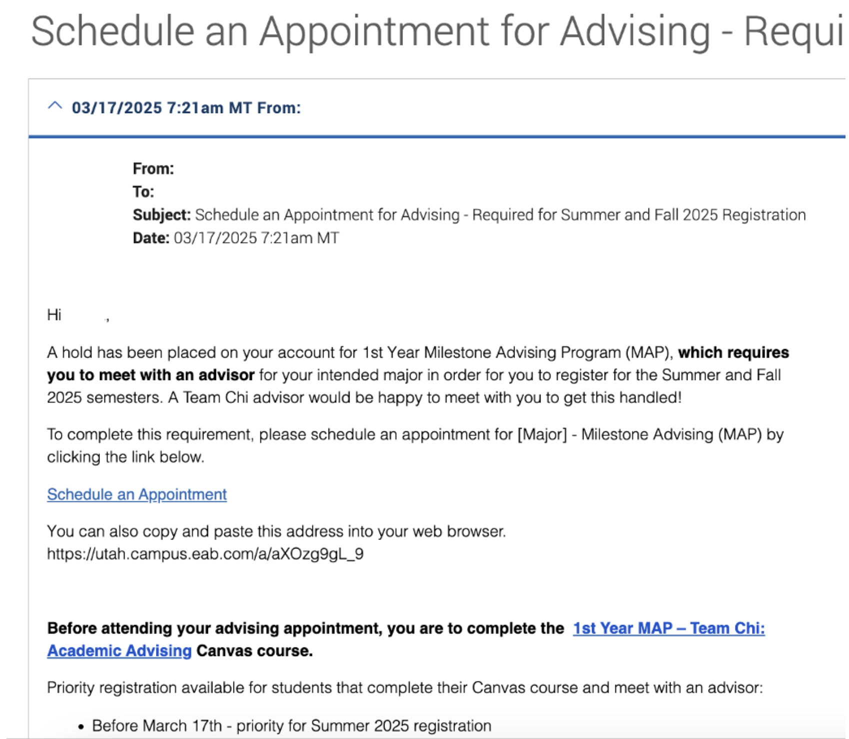
    b. If you *just* want students to be able to schedule through the appointment campaign and *not* through the Student Scheduler, select Campaigns in that line of availability.



2. Click the Campaign tab on the left.
3. Click Appointment Campaigns or Add New.
4. Fill out the basic details of the campaign, including:
    a. Name of the Campaign with the naming convention “UNIT NAME – PURPOSE – TERM” (Please identify a common unit name, abbreviated if necessary, for your unit for consistency.)
    b. Instructions or Notes for Landing Page
    c. Care Unit, Location, and Service associated with the campaign; as mentioned above, you’ll need to have corresponding availability set up before creating the campaign
    d. Appointment limit; this designates how many appointments students can book through the campaign within the time frame
    e. Appointment length; this supersedes the default length of the appointment that the Navigate team configured
    f. Slots per time (if you want to allow group appointments); this also supersedes the settings of the availability
    g. Reminders; this would be in addition to any reminders normally sent, like the scheduling confirmation and 24-hour reminder
    h. Start and launch dates
    i. The start date is the first date any appointments can be associated with the campaign. You aren’t able to back-date the start date.
    j. The launch date is the date that the message will go out to students.
5. Click Continue.
6. There are 2 ways to identify campaign recipients:
    a. Use the Advanced Search filters to identify students who are eligible to enroll, but who have not yet enrolled.
    b. Create a Student List from another source (UAIR dashboard) and pull that list into the campaign.
7. Scroll down to the bottom and click Include Inactive, if needed.
8. Click Search.
9. Click the box next to Name and then click the blue link that says Select all ____ items.
10. Click Continue.
11. Once again, click the box next to Name and click the blue link that says Select all ___ items.
12. Click Continue.
13. Click Add Welcome Message.
14. Create the message:

    a. Use a template on file by clicking Apply a Template, click Select Template in the drop-down box, and click __.
    b. To save your message as a template, click Browse and Preview Templates under Apply a Template, click + Add Template, use the naming convention "Unit and Purpose," check Make template public if you want others to be able to use this template, fill in the remaining fields, and click Save Template.
    c. Click the Enhance with AI to adapt the tone and length of the message.
15. Review the preview of the message on the right side of the screen to ensure all of the merge tags are coming through correctly.
16. Click Save Welcome Message.
17. Click Continue.
18. Review and click Start Campaign.

Student View:
Students will receive an email in Outlook and in their Conversations tab in Navigate inviting them to the campaign.



Schedule an Appointment for Advising - Requi

03/17/2025 7:21am MT From:

From:
To:
Subject: Schedule an Appointment for Advising - Required for Summer and Fall 2025 Registration
Date: 03/17/2025 7:21am MT

Hi ,

A hold has been placed on your account for 1st Year Milestone Advising Program (MAP), **which requires you to meet with an advisor** for your intended major in order for you to register for the Summer and Fall 2025 semesters. A Team Chi advisor would be happy to meet with you to get this handled!

To complete this requirement, please schedule an appointment for [Major] - Milestone Advising (MAP) by clicking the link below.

Schedule an Appointment

You can also copy and paste this address into your web browser.
https://utah.campus.eab.com/a/aXOzg9gL_9

Before attending your advising appointment, you are to complete the 1st Year MAP – Team Chi: Academic Advising Canvas course.

Priority registration available for students that complete their Canvas course and meet with an advisor:

- Before March 17th - priority for Summer 2025 registration

When students log into the student site or the app, they will see an appointment invitation on their appointments screen.

Appointment Invites

[Appointment Invitation for Student Success Coaching - 30 Minutes]
Please respond by 05/31/2025

[Appointment Invitation for Psychology - Milestone Advising (MAP)]
Please respond by 05/15/2025

Email navigateinfo@utah.edu with any questions.