Proactive Advising & Appointment Management

Proactive advising is the process anticipating needs of students, identifying students with these needs, and conducting a targeted outreach to address the needs early and often. Appointment campaigns offer a tool to promote proactive advising. In addition to providing students with a unique quick schedule link, appointment campaigns provide advisors a tool to manage student compliance with appointments and send reminders to students still needing to schedule. Campaigns also allow advisors to dedicate time specifically to campaign type appointments within appointment availability.

Suggestions of Use for Appointment Campaigns

Campaigns are intended to be used when students are required to participate in a scheduled appointment or are in high-needed of an advising interaction (example: instructor referral, early alert campaign).

It is not recommended for appointment campaigns be used as a marketing tool or for suggested/optional opportunities. Overuse of appointment campaigns will create email saturation and perception of ‘spam’ messages for students.

Our goal is to create an environment and culture where students recognize that emails from their advisors, specifically those sent via SSC Campus, is an email requiring them to take an action.

Examples of Appointment Campaigns

- Registration advising
- Re-enrollment for upcoming term
- Major declaration (for exploratory track and pre-major students)
- Academic standing (probation, return from suspension, etc.)
- Downward trending GPA
- Lack of advising interaction for the semester
- Senior Check-ins / Graduation Threshold
- Students preparing to return from exchange
- Mandatory group meetings / group advising

10 Steps to Sending an Appointment Campaign

Step 1: Identify the Target Student Group

There are several starting points and options. Select the option that best meets your needs and services.

- Upload student ID’s to create a watch list, then send a campaign using the watch list
- Used the advance search to identify students meeting a specific criterion, then send a campaign to the list
- Utilize an assigned advisee list displayed on the staff home page
- Conduct an advanced search from within the campaign set-up

Step 2: Determine which advisors will participate in the appointment campaign

- Option 1: Run individual advisor-based campaigns based on smaller lists of students
- Option 2: Run a department/major wide campaign with multiple advisors based on a broader/larger list of students.

Step 3: Add campaign specific availability (and update other availability if needed)

- Option 1: Add your own individual campaign availability
- Option 2: Ensure that all participating advisors campaign availability for the reason, location and date range aligned with the appointment campaign definition
Step 4: Create your campaign
To create your campaign, you can:

- Option 1: Start with an existing watch list, saved search, search results or assigned advisees:
  - Use the Actions menu, and select Appointment Campaign
- Options 2: Create a new campaign and generate a student list through the campaign:
  - Go to Campaigns from your left side menu bar
  - From the right-side Actions menu, select Appointment Campaign

Step 5: Define your Campaign

- **Campaign Name**: Give your campaign a name that identifies who, what, why and semester
- **Care Unit**: Select your Care Unit
- **Location**: Aligned with your availability and services, the location is the same location you add when creating availability. Based on the service you selected, you should only have one location option.
- **Service**: Aligned with the service listed in your availability. Be sure to select the service that is pre-fixed with your major/department. (Ex. NURS – Registration Advising, Psych – General Advising, etc.)
- **Begin / End Date**: These dates identify when students should be meeting with an academic advisor for the campaign reason. These dates should also align with your campaign availability range.
- **Appointment Limit**: For this appointment/campaign, how many appointments are students allowed to schedule with you? For example, does each student only need to meet with you once for registration advising? If yes, then the appointment limit will be one.
- **Appointment Length**: Select the length for the appointment.
- **Slots Per Time**: You can meet 1:1 with students or have group-based appointments.

Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

Step 6: Review Students

- If you...
  - started with an existing list, it will appear here.
  - started by creating a new campaign, use the advance search filters to generate the student list
- Once you have our list of students, review the student list. During this step, students can also be removed from the list.
Step 7: Add Staff
- Select the participating advisors who will be available to meet with students for this campaign.
  - NOTE: Only advisors with campaign availability for the campaign reason (defined in the campaign, Step 5) will appear here.

Step 8: Compose Message
- The merge tags will automatically populate with the student’s first name and the unique appointment link.
- Customize the subject line (if you’d like to). ‘Call to Action’ type subject lines are recommended – i.e. what do you want the student to do?
- Update the body of the message. Short and to-the-point emails are recommended.
- By scrolling down on the page, you can preview the email the student will receive and the scheduling landing page associated with the link in the email to the student.

Step 9: Review
- Review the campaign details.
- Identify the types of reminders (email / text) you would like associated with the campaign appointments. (NOTE: The reminder settings apply to both students and advisors.)

Step 10: Send your Campaign 😊
After sending your campaign, students will receive the email message you created with a unique link to schedule an appointment. There are 4 possible outcomes.

**Outcome Possibility 1: Student Schedules via the Link in Email**

Scheduling through this process connects the appointment to the campaign tracking.

The link goes directly to the appointment scheduling grid.

**Confirmation page**

**Outcome Possibility 2: Student Logins in to SSC Campus and Schedules through Campaign**

Scheduling through this process connects the appointment to the campaign tracking.

When students are a part of a campaign, a large yellow banner requesting an appointment will appear on their student home page with the unique ‘schedule the appointment’ link (same as the email). Students can click here to schedule the appointment. The student view is aligned with Outcome Possibility 1 (above) for the scheduling process.

**Outcome Possibility 3: Student Schedules via ‘Make an Appointment’**

Scheduling through this process DOES NOT connect the appointment to the campaign tracking. See information on Campaign Management for how to connect this appointment to the campaign.

If you have availability outside of the campaign type (thus, appointments) for the same service as the campaign (ex. NURS – Registration Advising), students can also schedule appointments through the ‘Make an Advising Appointment’ button on their home screen (assuming they overlook the yellow action banner).

The student will walk through the regular student-facing scheduling steps to schedule an appointment with you. If the student does this, you will need to associate the appointment report to the campaign within the report summary box. The appointment report will acknowledge that the student is part of the campaign and provide a drop-down menu for you to select the campaign and associate the appointment.

**Outcome Possibility 4: Student does not schedule an appointment.**

Through the campaign dashboard, you will be able to identify students who have not scheduled/attended appointments for the campaign and send reminder messages.

See information on Campaign Management for more information related to this topic.
To get to the campaign ‘dashboard’, click on the campaign icon from the right-side menu bar and select the campaign you would like to view.

There are a few tab options:

- **Appointment Made**:
  - Students listed here scheduled an appointment for the campaign service through the campaign email or yellow action bar on their home page.
  - There is also a column indicated whether or not the student attended the appointment.
  - **NOTE**: If you have availability for appointments (non-campaign type) for the same campaign reason, students who scheduled appointments through the blue ‘make an appointment link’ will not be visible here.

- **Appointments Not Yet Made**:
  - Identifies students who have not scheduled an appointment through the campaign yet.
  - **NOTE**: If you have availability for appointments (non-campaign type) for the same campaign reason, students who scheduled appointments through the blue ‘make an appointment link’ will continue to remain on this list until a report is filed and connected to the campaign.

- **Reports Created**
  - Identifies students for whom you’ve met with and submitted a report on advising.

- **Eligible Appointments**
  - If you have availability for appointments (non-campaign type) for the same campaign reason, students who scheduled appointments through the blue ‘make an appointment link’ may appear here.
  - If a student checks-in to the kiosk at the location of the campaign for the same reason as the campaign, they should display here also.
  - If there are appointments here, you can ‘associate’ them with the campaign

At the conclusion of each advising appointment, you will create a report on advising. If the student scheduled through the campaign (email or yellow action banner), they will already be associated with the campaign. However, if they scheduled through another method or dropped in, you will need to associate them with the campaign in the report.

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**In the Advisor Report, a field for ‘appointment campaigns’ will be an option for students who are on an appointment campaign list.**

Click the drop-down menu and select the corresponding campaign name.

**(NOTE: Only the campaigns associated with the student should appear).**

By selecting the campaign and saving the report, the student will now be ‘associated’ with the campaign and display on the Appointments Made tab (thus removed from the not yet made tab).
Commonly Asked Campaign Questions

**Question:** If a student schedules an appointment with me outside of the campaign link, but the appointment is supposed to be part of the campaign, how can I associate the appointment with the campaign so that the campaign information knows that the student scheduled/attended?

**Answer:** There are two options for associating an appointment with a campaign.

- **Option 1:** Through the Report of Advising – If the student has a campaign associated with them, then the Advising Summary Report will have a campaign drop down menu where you can select that the appointment was part of the campaign.
- **Option 2:** The ‘Eligible Appointments’ Tab – Through the campaign, there is an eligible appointments tab. This will display any appointment scheduled with you for the same reason/service, location and in the timeframe of the campaign. If the student is a part of the campaign, you can use the ‘actions’ drop-down menu to add the appointment to part of the campaign.

**Question:** If the campaign appointment limit is one, and the student schedules, then cancels the appointment, is their one appointment taken?

**Answer:**

- **No** – Once the appointment is scheduled, the unique link the student received in the original campaign email is reactivated and the student will be able to use it to reschedule the appointment.

**Question:** If the campaign appointment limit is one, and the student no-shows for the scheduled appointment, can they reschedule their own appointment using the original campaign link in their email?

**Answer:**

- **Yes** – *As long as the advisor marked the student as a no-show.* Once the student appointment is recorded as a no-show, the unique link the student received in the original campaign email is reactivated and the student will be able to use it to reschedule the appointment.

**Question:** Do I need to update my current appointment availability when I run campaigns?

**Answer:** It’s up to you. If you only want to be available for appointments through the campaign, then you will need to change your existing appointment type availability to end the day before the campaign starts (and then update it after the campaign ends or create a new availability block for after the campaign). Alternatively, you can have overlapping availability types (campaign and appointments that will not double book) allowing any student (campaign or not) to access any of your availability.

**Question:** If the student drop-ins in for advising and is part of the campaign, how can I associate the appointment with the campaign?

**Answer:** If you are an advisor associated with the campaign, the report on appointment should offer you the opportunity to associate the report with a campaign *IF* the care unit, service and location all match the definition of the campaign. When this is the case, there will be a menu option for campaigns with in the appointment report.