


MONTANA TECH

EAB Navigate Appointment Campaign Worksheet

Appointment campaigns allow staff to reach out to specific student populations and encourage them to schedule appointments.

In order for Appointment Campaigns to work successfully, you must have both **calendar sync** and **availability** set up.

1. Open Campaigns using the  icon in the left navigation menu
2. Create a new Appointment Campaign by clicking in the Actions menu on the right
3. Use the following parameters to Define your Campaign
 - Campaign Name: {Current Term}|{Description}|{Office/College/Major}|{Campaign Creator}
Ex: Sp22|Summer/Fall Registration | Business | T.Tregidga
 - Care Unit: Your care unit. Ex: Faculty, Professional Advising, etc.
 - Location: Your location. Ex: ACE, Highlands Campus, etc.
 - Service: Your campaign appointment type. Ex: Class Registration, 20th Day Advising, etc.
 - Begin and End Date: choose what is appropriate for your campaign
 - Appointment Limit: 1 (unless you are hoping that students schedule more than one meeting)
 - Appointment Length: 30 minutes is typical, depending on appointment can be 60 minutes
 - Slots per time: 1 (unless this is a group advising campaign)
4. Add students to your campaign
 - You may choose to add all of your assigned students, or depending on your campaign, you can use the Advance Search section to add a specific group of students for outreach
 - For ideas or inspiration on different campaigns to run, check out <https://eab.com/technology/infographic/student-success/61-campaign-ideas/>
 - Remove any students you wish to exclude from the campaign based on the list provided
5. Add organizer(s) to your campaign
 - This will typically just be yourself, but if you approve of students meeting with other advisors in your care unit/location, then add that advisor as well
6. Compose your message
 - Be clear in your message as to why you are contacting the student and the “call to action”
 - Do not remove the “schedule link” but outside of the bracketed fields, you can change the language to reflect your communication style (don’t forget to update the subject line as well)
 - Check out the “Available Merge Tags” to see how you can personalize the message
 - Preview the email and the landing page that students will see when they click the “Schedule an Appointment” link
7. Send it!

If you have questions or concerns, or would like someone to walk through creating a campaign with you, don’t hesitate to reach out to Sarah - snorthwolfe@mtech.edu