Messaging Campaigns

This workflow guide covers how to create and launch a Messaging Campaign. Messaging Campaigns allow UTC staff to email or text a group of students on specified dates about things they need to do or activities they need to attend. This type of campaign has no objective, unlike Appointment or Enrollment Campaigns, so students receive all messages (SMS or email) in the campaign.

Messaging Campaigns and Navigate

Messaging Campaigns are a useful part of Navigate workflow. Strategic questions should be asked when creating email campaigns, such as:

- How would you like to impact your students with campaigns? What student populations do you envision this would be used for?
- Who should be launching campaigns? Should campaigns be part of each staff member's personal workflow? Or should they be more centralized and launched by unit leaders?
- What guidance do you plan to give to your staff as far as follow-up?

Launching a Messaging Campaign

To begin, open the **Campaigns** page and select **Add New** from the Messaging Campaigns section.
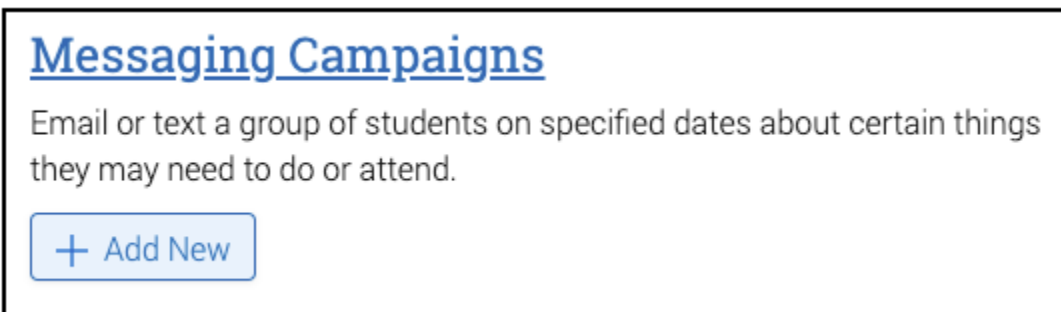
Define the Campaign

The **New Messaging Campaign** page opens. Set the criteria for the Messaging Campaign. The fields that must be filled out are listed and defined below.

Campaign Name

Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

> **Note.** Start campaign names with the most important info so it's easy to identify the purpose and to avoid title duplication.

Tracking URL

The URL you want students to click. This will show in an SMS nudge.

Tracking URL Display Value

The text students will see in an email message encouraging them to enroll. When students click the text, they go to the Tracking URL.

Add Students to Campaign

The next step is performing a search to find recipients for the campaign. Set your criteria and perform the Advanced Search. The search results page appears.

Select the students to add to the campaign and click **Continue.** You may also save this search if you want. Once you've gone to the next step, this list is static and does not update.

Review the students on the next page. If a student should not be in the campaign, select the box next to their name and choose **Remove Students from Campaign** from the **Actions** menu.


Once finished, click **Continue.**

Add Welcome Message and Nudges

> **Note.** Welcome messages are the first nudge sent to students.

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

To create the welcome message and other nudges, define your campaign and create your list of students for the Messaging Campaign. The Nudges page opens.
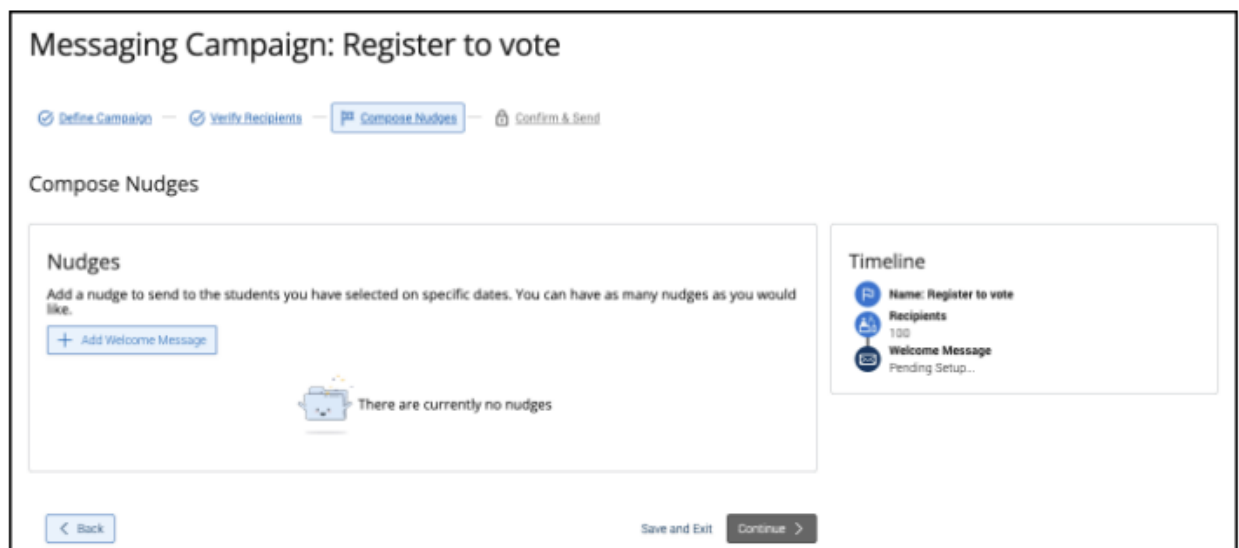
Click **Add Nudge** to create your first nudge. You can create either an email or SMS nudge. Note that you can only create one nudge of a single type per day. So for example, you can't have a text and an email nudge go out the same day, but you can have a welcome message that's an email the first day, then a text the next day, and so on.

You must create at least one nudge per campaign; however, you can create more. There are no limits on how many nudges you can send.
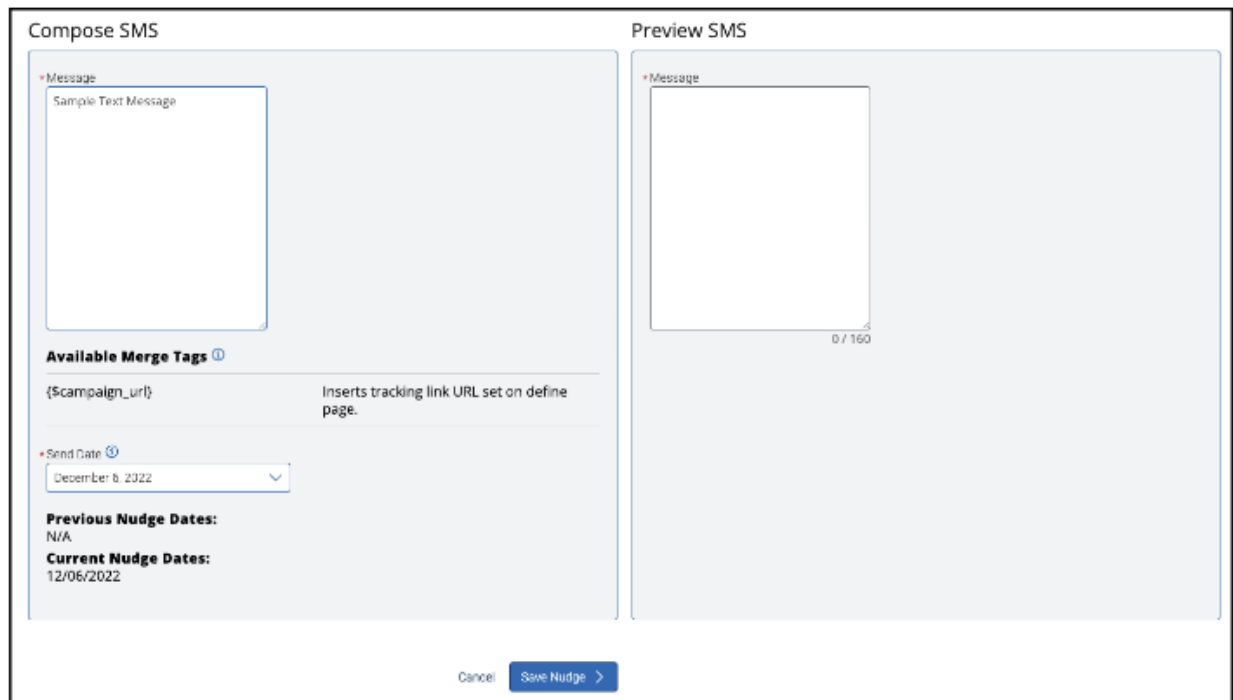
When you select the Email type, the page above appears. Enter a subject line and customize the message. For email messages, you can add an attachment to the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel. You can also attach a file to this message.

Fields used in the message composition are:

Email Subject
> The subject of the nudge email going to the student.

Message
> The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date

> The date the email nudge is sent. The nudge with the earliest date starts your Email Campaign.

After creating a nudge, click **Save Welcome Message/Save Nudge** to continue. You may continue creating nudges after this.

Important. Your Messaging Campaign "ends" when your last message is sent. You can continue to add Nudges after the last message is sent, if this is helpful to your Messaging Campaign.

When you select the SMS nudge type, the Compose SMS page displays.

The SMS must be 160 characters or less, and the campaign URL counts toward the limit. You can insert the campaign URL by using the {$campaign_url} merge tag. SMS nudges cannot be styled and pictures cannot be added.

Set a Send Date, create your SMS nudge and select **Save Nudge** to add it to your campaign.

Confirm and Send

Review your campaign details, nudges, and recipients on this page.

Click **Start Campaign** when you are ready to email the invites to the selected students.