Advising Campaign - Release 1 Hands-On Training: April 26—May 2

For Georgia Tech Undergraduate Advising Community:

Launch May 1st, 2023

Georgia Tech

Agenda

1. Welcome & Introductions
2. Overview
3. Terminology/Glossary
4. Creating Advising Campaigns
5. Add Students to a Campaign using Reports
6. Managing Appointment Campaign Responses
7. Manually updating Campaign Responses
8. Extend the End dates on a Campaigns
9. Clone a Campaign
10. Send List Emails
11. Advisee/Student Portal View
12. Advisee Case record view on SAL
13. Track Campaigns using Dashboards
14. Reports - How to view, create and clone reports
15. Support Resources

Advising Campaign Project & Training Team

Advisor Trainers & SMEs

- Angela Elleby
- Daurette Joseph
- Briana Lampert
- Emmie Cass
- Chris Lundy
- Tracy Boothe-Miller
- Pauline Glenn
- Shirley Manchester

Additional SMEs

- Kristi Mehaffey
- Barbara Howard

Technical Support

- Russell Wallis
- Devki Kumayan
- Shilpa Kuppuli
- Veena Kommagoni
- Tran Vu Tran

Project Management

- Kimberly Wynn White
- Beth Spencer
- Andrew Jarrett
- Vicki Johnson

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Advising Campaign Project Overview

PROJECT DESCRIPTION/BUSINESS DRIVER

Business Problem:

Advisors need an easy-to-use campaign feature to track and perform outreach to students who need to come in for required advising within the system. Advisors currently use spreadsheets and tools outside of Advisor Link impacting productivity.

Lack of campaign functionality is sighted by the Advising SWOT analysis as a weakness requiring a solution.

Business Goals:

- Provide advisors a flexible, user-friendly tool in Advisor Link to add a group of students to a new or existing campaign in minimal clicks that scales to meet the advisor's number of students
- Provide advisors with capabilities for personalized and scalable messaging to students related to these campaigns, including reminders
- Provide advisors the capability to ensure students have taken action on campaigns they are a member of
- Deliver training to end-users to effectively utilize capability

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PROJECT SCOPE

Design and implement within Student Success Hub (Advisor Link) the standard Campaign functionality based on the prototype demonstrated and approved by OUE Leadership and supported by the Advising Community. This project will **deliver baseline functionality** to include:

- **Targeted Calls to Action**
  Advisors can quickly identify a population of students to book appointments with them, filtering by any student characteristic.
    - Create an advising campaign
    - Add campaign members (students) from a report
    - Update campaign member status
    - Notify students about campaign and request to schedule relate appointment

- **Automated Student Responses**
  Advisors have visibility into which students have taken action in real-time, without manual intervention.
    - Review campaign member status and changes during the campaign '

- **Data Visualization**
  Advisors can view their calls to action holistically, making data driven decisions on where and how to act.
    - Track campaigns using reports and dashboards

- **Personalized Messaging**
  Advisors can send mass emails to these populations of students utilizing merge fields and templates, within Salesforce limits.

- **Advisor Training**
  Advisors can use the capability, know where to find job aids and how to request support.

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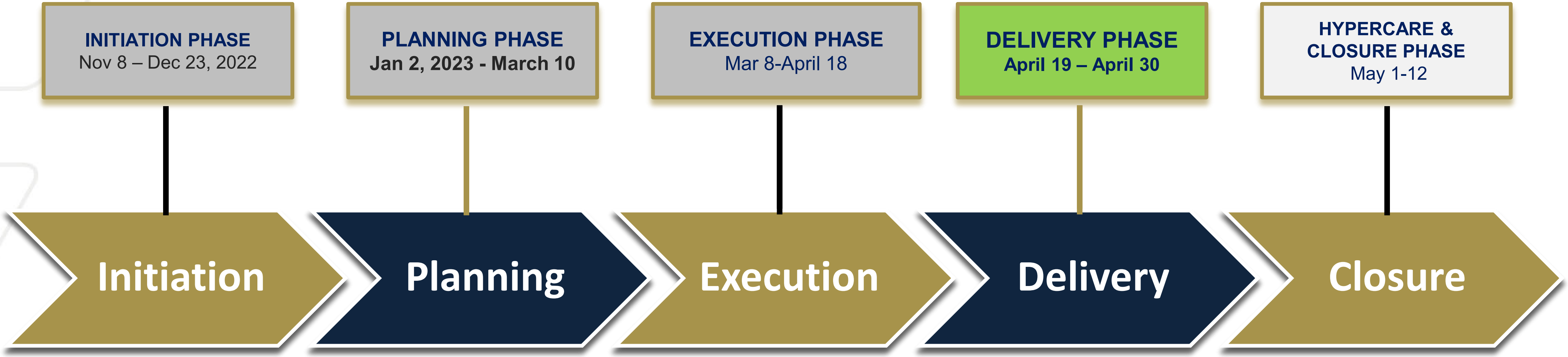
Project Timeline



Initiation
- Conduct R1 Design Thinking Workshop with CSA
- Configure OOTB Prototype
- Draft Project Scope Document

Planning
- Draft & Approve Solution Design Document
- Present to OUE Leadership & Advising Community
- Build Product Backlog
- Form Project Team
- Kickoff Project

Execution
- Refine Product Backlog
- Build Sprint Plan
- Configure Solution
- Conduct Demos & Obtain SMEs Feedback
- Perform UAT

Delivery
- Prepare Training Materials
- Train-the-Trainers
- **Deliver End User Training**
- Update Support Model
- Obtain Sponsor Approval for PROD Migration

Closure
- Monitor Support Tickets
- Conduct Lessons Learned Feedback Session with Project Team
- Present Summary to Sponsors, Project Team & Stakeholders

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Terminology

Term	Description
Advisee Record (**Case**)	A type of Case record that holds advising-related data for a student, such as notes, advising appointments, and Tasks. Technically, it's an advisee Case record. But that's quite a mouthful, so we often shorten it to "advisee record."
Campaigns	A functionality within Salesforce that allows mass communication for a call to action. A Salesforce campaign is an engagement initiative you plan, manage and track within Salesforce
Campaign Members	Are the contacts (Students) that are included in a campaign
Task/Activity	Salesforce Activities track the interactions of your advisees with you or any To-do(s) pending at their end.

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Terminology

Term	Description
Campaign Member - Status	
Invited	This is a default status for Advising Appointment Campaign. Once a student is added to a campaign, their member status is set to "Invited".
Attended	This status means that a student has "Attended" an appointment that was created upon receiving a task notification from a Campaign. The status automatically updates at the end of the appointment date, unless the advisor manually changes the status value.
Cancelled	The "Cancelled" status is showed after a scheduled appointment is cancelled by a student on the portal, or an advisor cancels the appointment manually. Once the campaign appointment is cancelled, the student campaign member status returns to "Invited" and the task to schedule the appointment reopens.
No Show	This status shows that a student was a "No Show" on a scheduled appointment. Once the advisor marks "No Show" on Appointment Manager, it automatically reflects as "No Show " on the Campaign Member status, and the task to schedule an appointment reopens for the student.
Scheduled	The "Scheduled" status shows a Student has booked an appointment through the Student portal. The task is completed after the student schedules the appointment.

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Access to the QA Sandbox

This is a Hands-on training workshop designed to engage attendees with the **basic features** of Advising Campaigns.

- **Please log into the QA/TEST instance:** **https://gatech--qa.sandbox.lightning.force.com**
- This QA/TEST instance is available from April 26 to May 19th, 2023
- You are encouraged to practice the HOTS (hands on trainings) exercises during and after today's workshop so:
  - To become familiar with the functionality in Test
  - To better identify the type of support you need
  - To better serve and engage with your students

Advising Campaign Support Office Hours	
May 1	3:00 – 4:00 PM
May 2 – May 5	11:00 AM – Noon
May 8	3:00 – 4:00 PM
May 9 – May 12	11:00 AM - Noon

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Navigation

Create an Advising Appointment Campaign

Please log into the QA/TEST instance:

https://gatech--qa.sandbox.lightning.force.com

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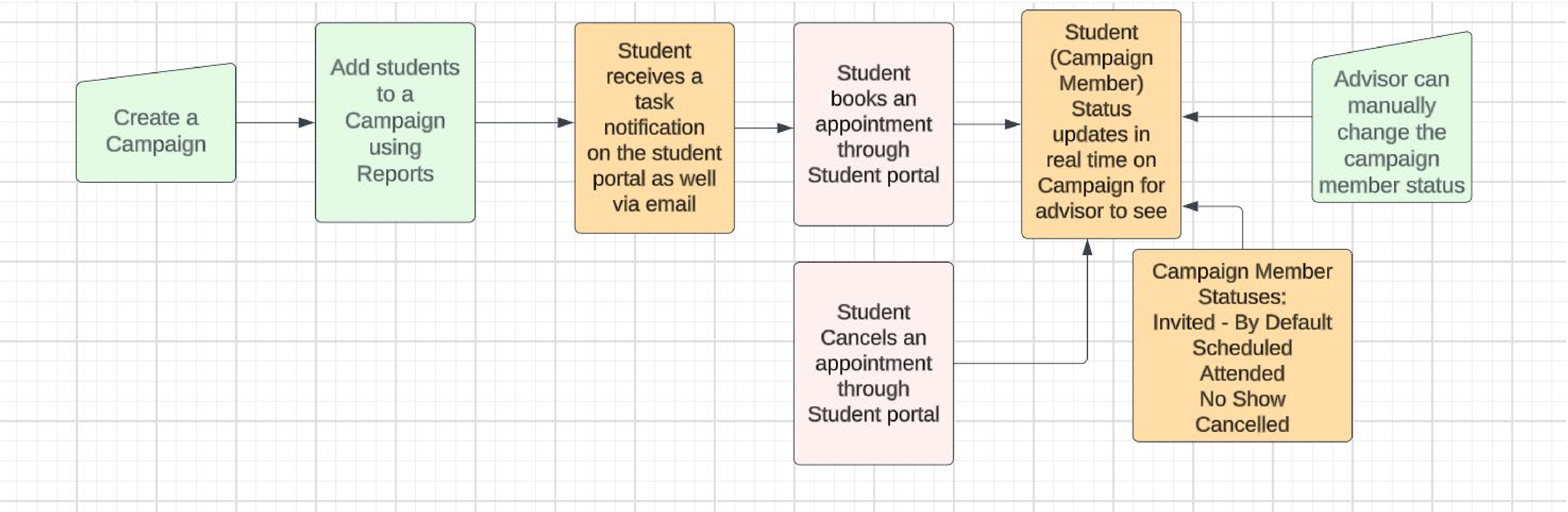
Advising Appointment Campaigns Process



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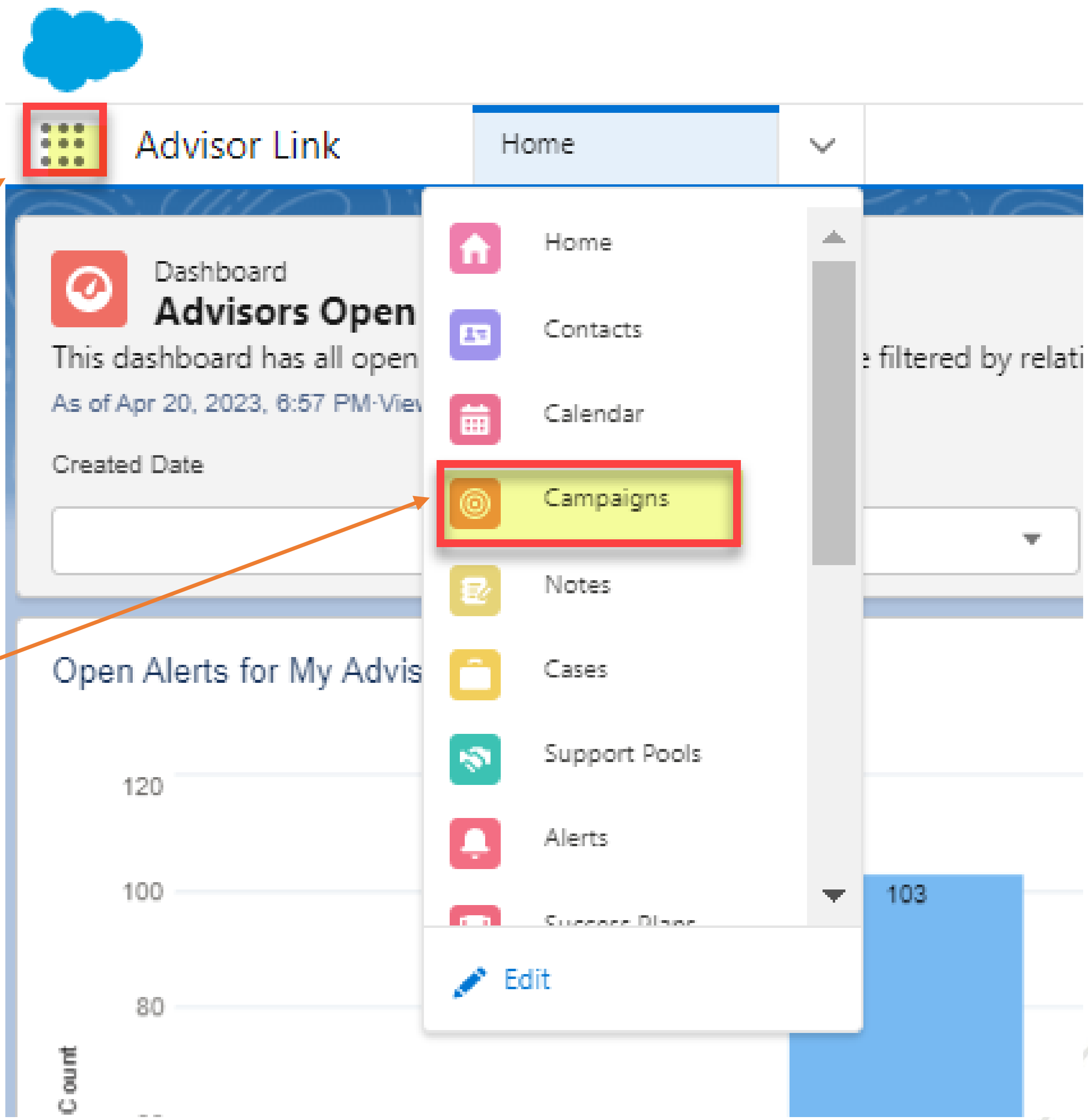
Create Advising Appointment Campaigns

1. Log into the Advisor Link App

2. Go to Apps, type in Campaigns

   OR

3. Go to the Navigation Menu, Select Campaigns



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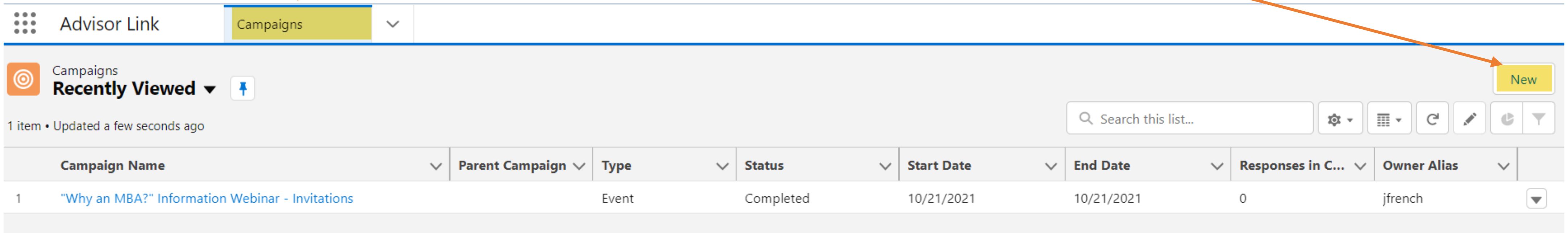
Create Advising Appointment Campaigns … Cont’d

Once on Campaign tab, Click **New** on top right to create new advising campaigns



Create Advising Appointment Campaigns … Cont'd

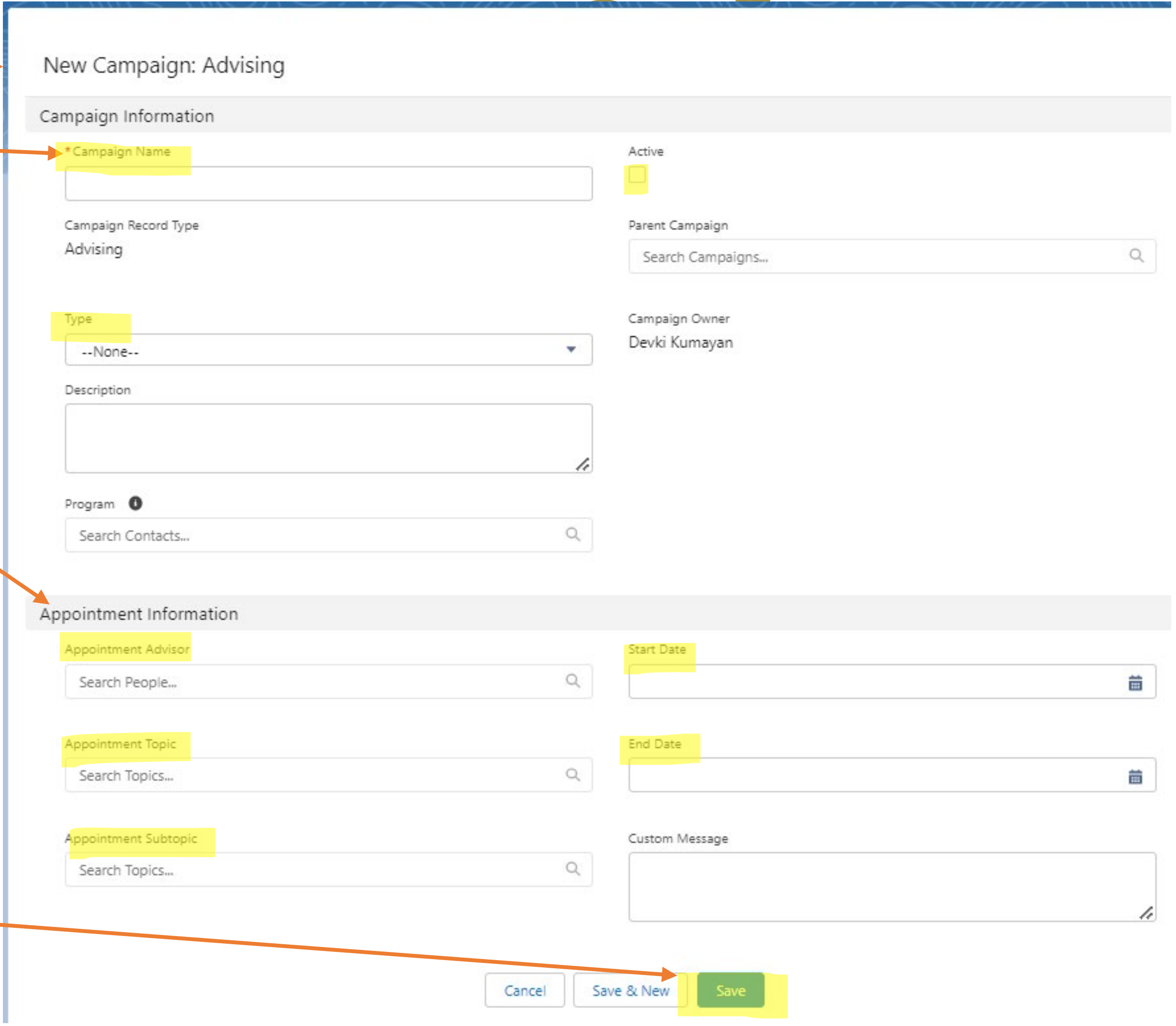
On a new Campaign page Add:

1. Campaign Name:
2. Type : Advising Appointment
3. Check Active box
4. Description

Add Appointment Information:

1. Appointment Advisor
2. Appointment Topic
3. Appointment Sub-Topic
4. Start Date
5. End Date
6. Custom message if any.

Click SAVE



Note: A new campaign will not be saved if the "End Date" is the same as Today's date or the "Start Date".

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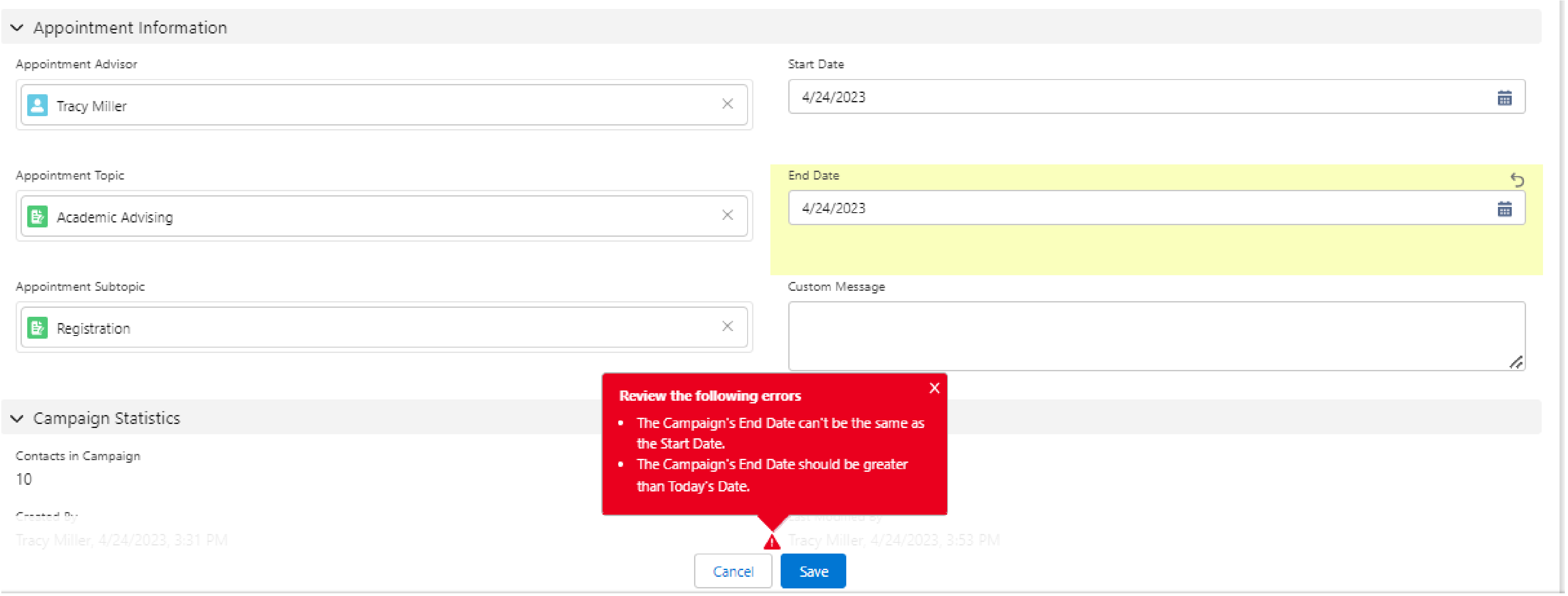
Create Advising Appointment Campaigns … Cont'd

An error message will show up if:

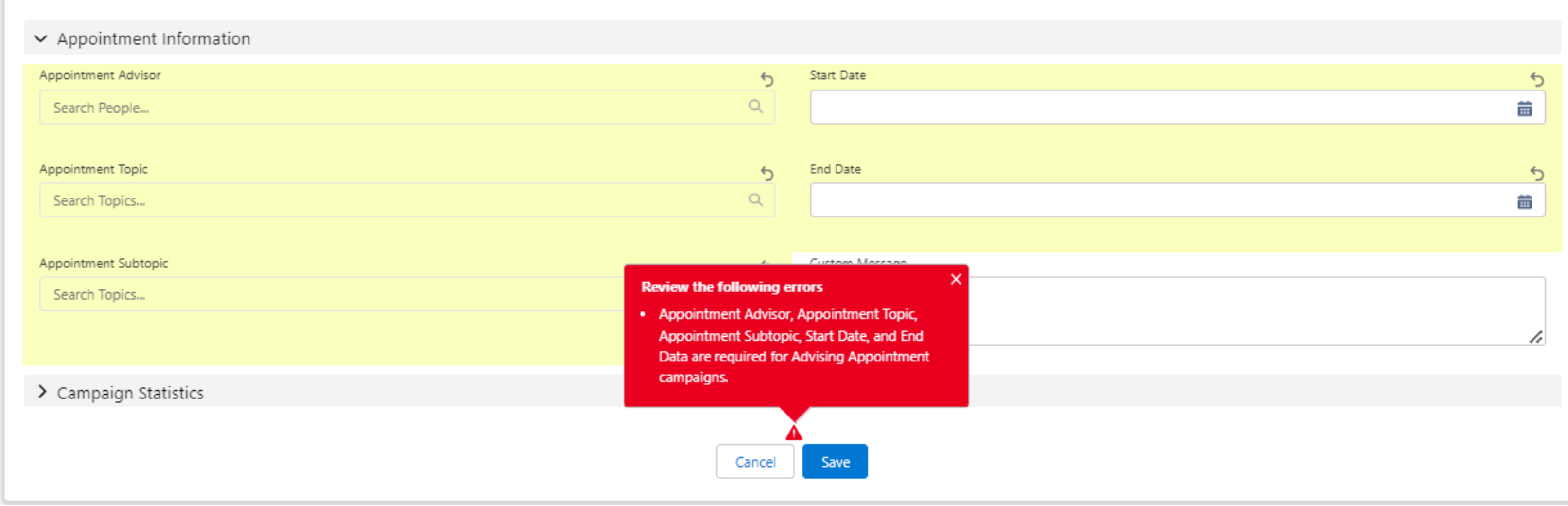
1. End date is same as Start Date
2. End date is Today's Date



Create Advising Appointment Campaigns … Cont'd

An error will show up if any of the following fields are missing from a Campaign

1. Appointment Advisor
2. Appointment Topic
3. Appointment Subtopic
4. Start Date
5. End Date



Locate Your Campaigns – Various Ways to Locate Your Campaign

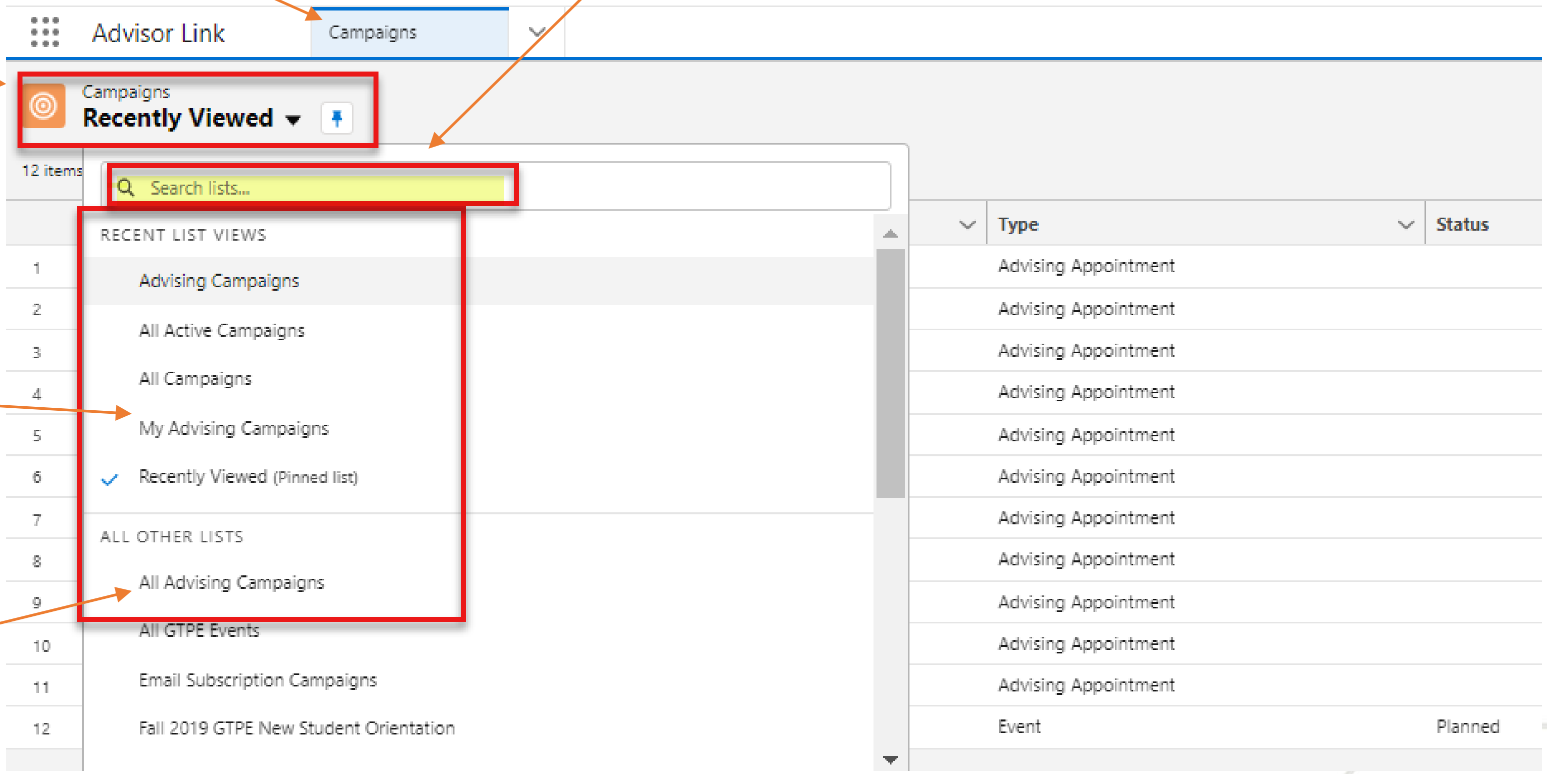
- On a Campaign tab look for **List Views**

- Search using name on search bar

- Recently Viewed

- My Advising Campaigns

- All Advising Campaigns



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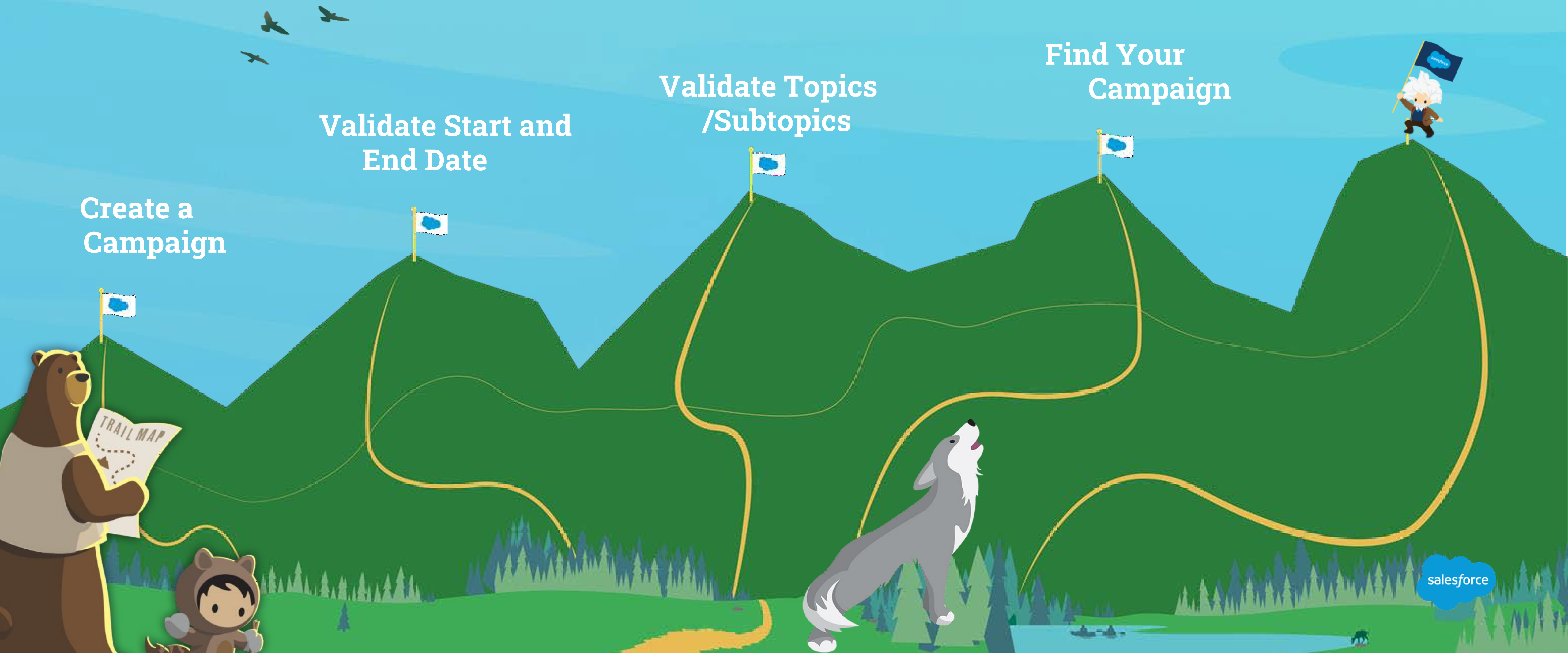
HOTS : Hands On Training Session (Demo)



HOT: Exercises (5 minutes)

1. Create an Advising Campaign
2. Add Campaign Name, Advising - Summer Registration
3. Save the Campaign after adding all the fields

- ✓ Appointment Advisor: "Your Name"
- ✓ Appointment Topic- Academic Advising
- ✓ Appointment Subtopic- Registration
- ✓ Start Date/End Date

4. Find newly created Campaign, Advising –Summer Registration

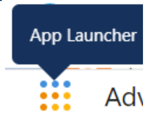
Add Students to an Advising Appointment Campaign Using REPORTS

Add Students to Appointment Campaign from REPORTS

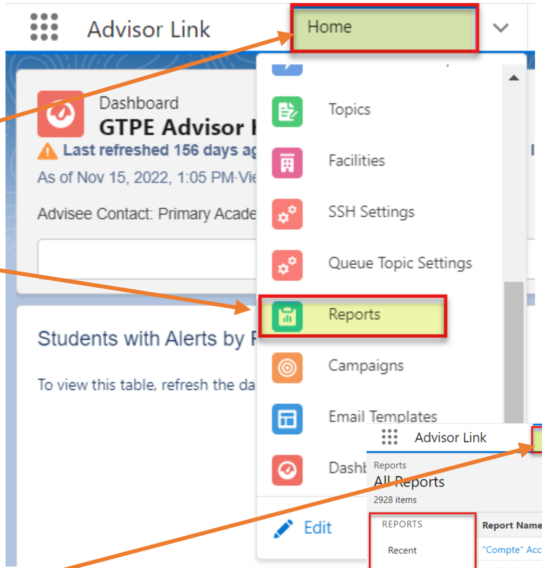
1. Go to Navigation Menu and Select Reports

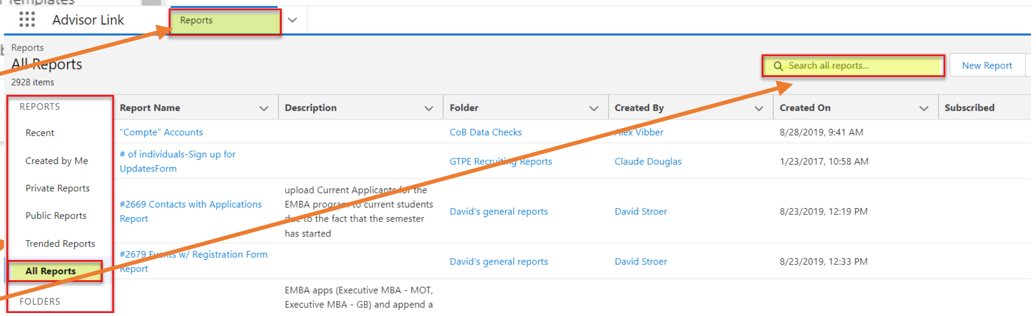
   Or

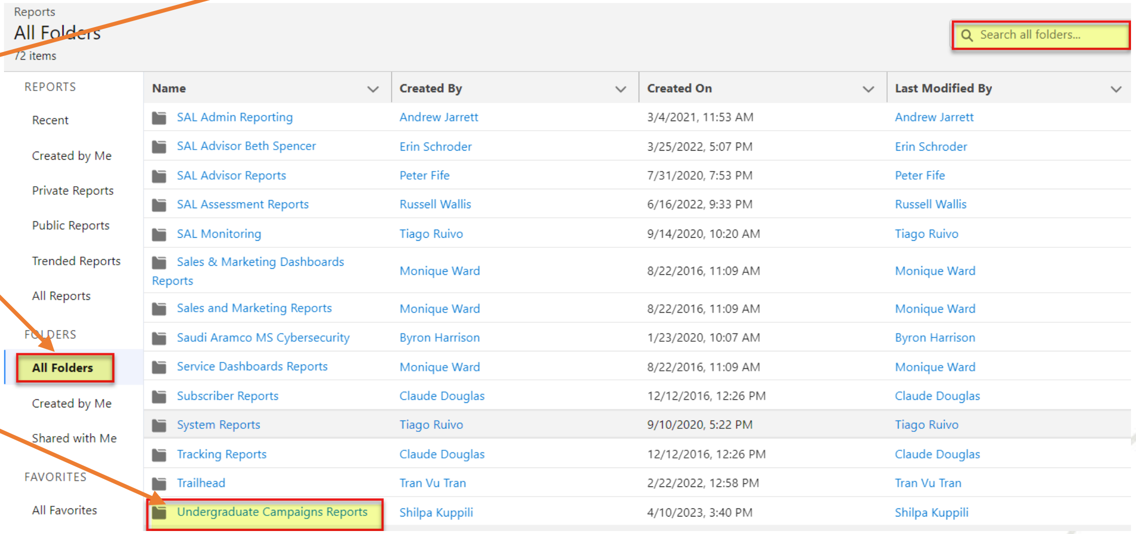
2. Go to App Launcher and type in Reports



3. Once on Reports tab, search for the report by one of the following:
   a) Tabs on Left –ALL reports & search bar on top right of the page
   b) Go to All Folders (Undergraduate Campaign Folder) & look for a specific subfolders if available (GT Campaign Reports Library) and find the report manually or use the search bar at the top right of the page







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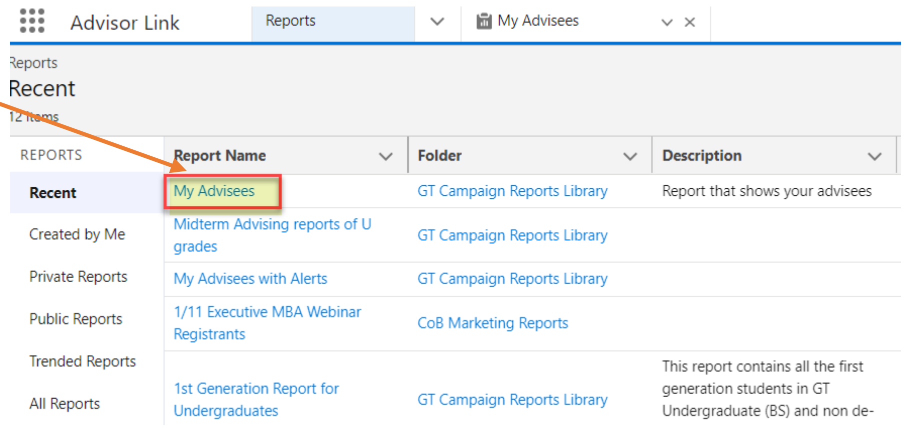
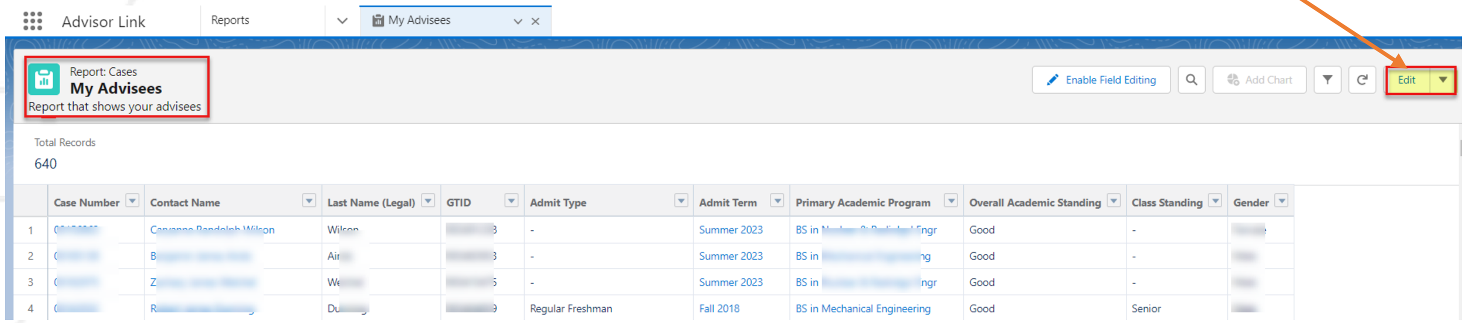
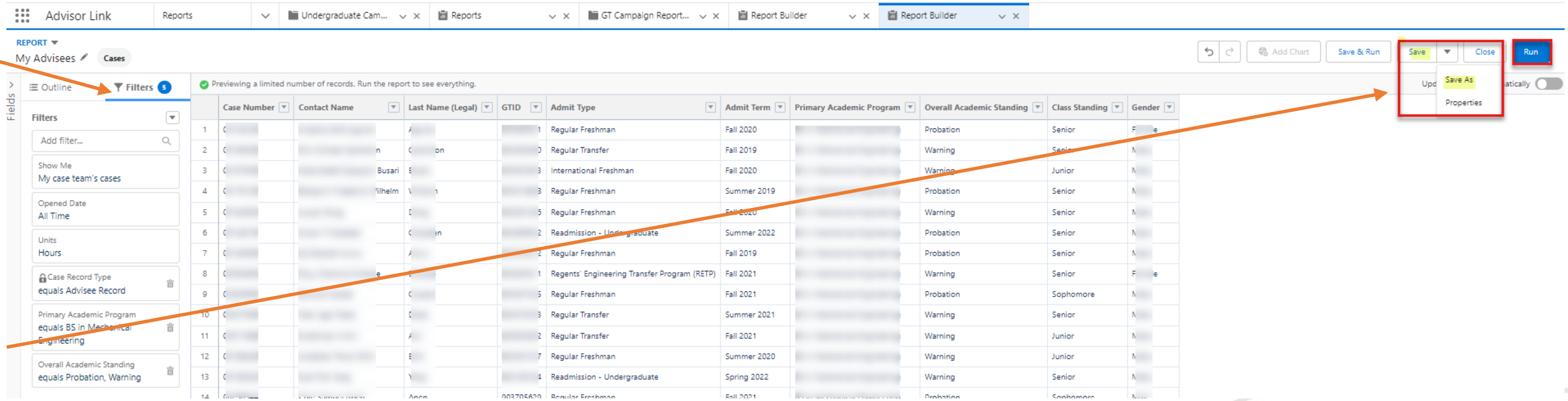
Add Students to Appointment Campaign from REPORTS … Cont’d

1. **Select the report** you want to use for Advising Campaign
2. Once Selected, make any changes you need using **EDIT** on the top right of the page





3. Add or edit any **filter criteria** needed for the report
4. Refresh the report or Run the report to ensure your results are looks good.
5. **Save As** by clicking drop down on Save with a new Name in your department folder



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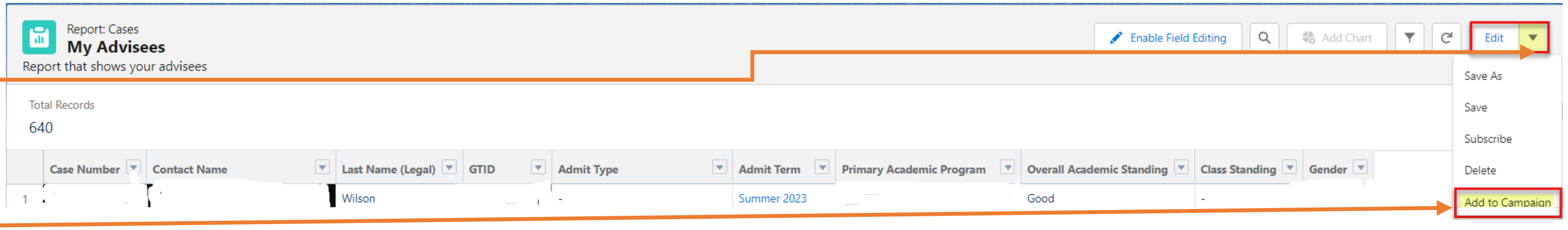
Add Students to Appointment Campaign from REPORTS … Cont’d

1. Click **drop down option** on the **EDIT** at the top right corner of the report page



2. Select **Add to Campaign**

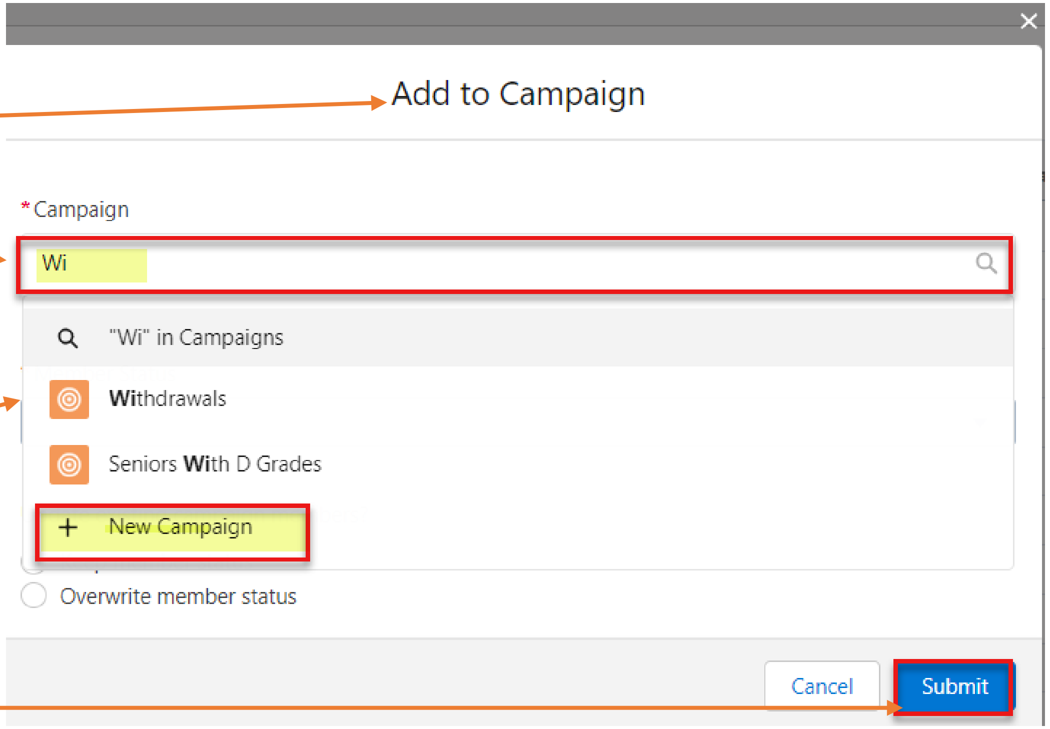
3. A new pop-up window shows up

4. **Type in the name of the Campaign**

Or

5. **Select** from available options, if any

6. Click **SUBMIT**



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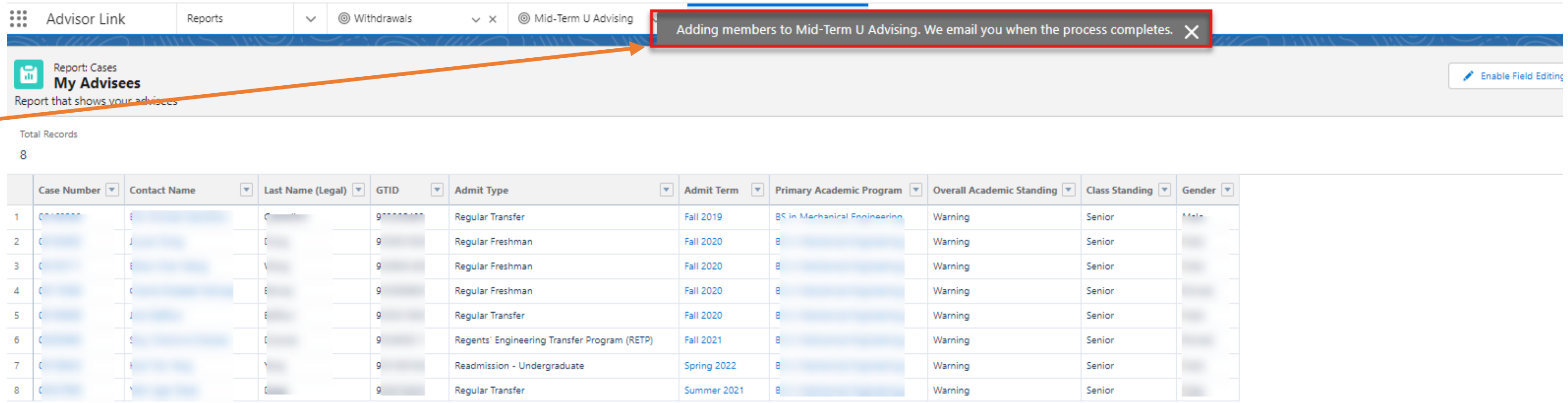
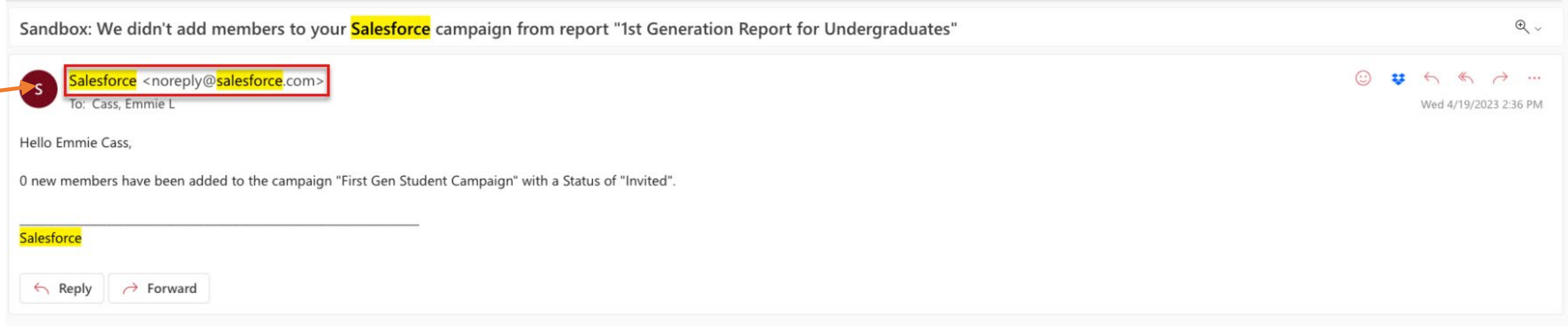
Add Students to Appointment Campaign from REPORTS … Cont'd

1. A message flashes on the screen "Adding members to "Campaign Name". We email you once the process completes.



2. Advisor will receive an email from Salesforce



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HOTS: Hands On Training Session (Demo)

HOT: Exercises (5 minutes)

1. Select a Report, My Advisee from GT Campaign Reports Library sub-folder in Undergraduate Campaigns Reports folder

2. Edit the filter criteria, Overall Standing equals “Warning”

3. Save the new report with new name e.g. My Advisee with Warning standing” in the Department folder on Undergraduate Campaigns Reports Folder

4. Add to a campaign : Advising - Summer Registration

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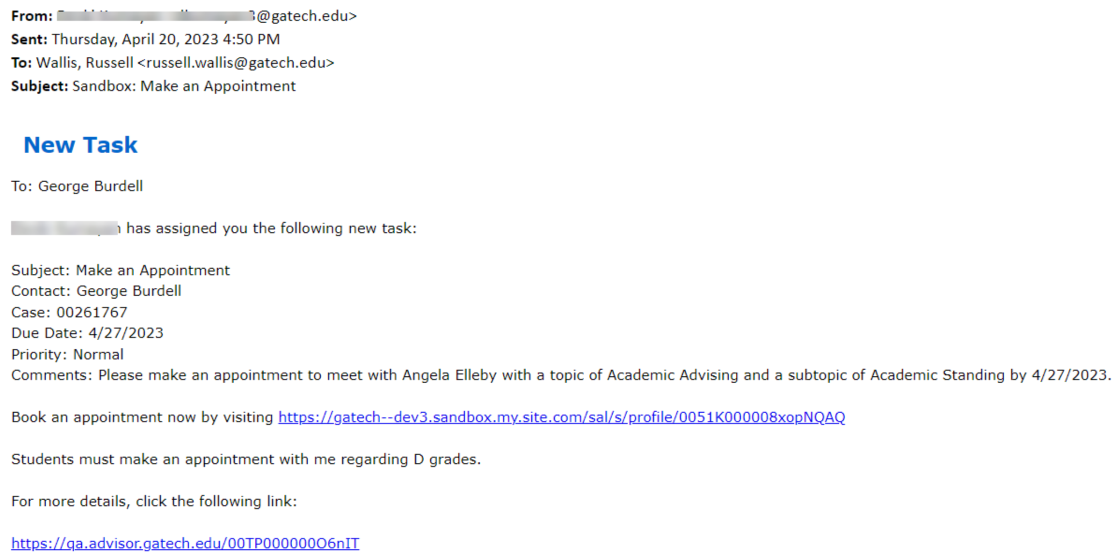
Student Community View

Student View: Notification About A Campaign

1. Once student is added to a Campaign via Report, they receive an email informing them about a task assigned by their advisor to schedule an appointment.


From: [redacted]@gatech.edu>
Sent: Thursday, April 20, 2023 4:50 PM
To: Wallis, Russell <russell.wallis@gatech.edu>
Subject: Sandbox: Make an Appointment

New Task

To: George Burdell

[redacted] has assigned you the following new task:

Subject: Make an Appointment
Contact: George Burdell
Case: 00261767
Due Date: 4/27/2023
Priority: Normal
Comments: Please make an appointment to meet with Angela Elleby with a topic of Academic Advising and a subtopic of Academic Standing by 4/27/2023.

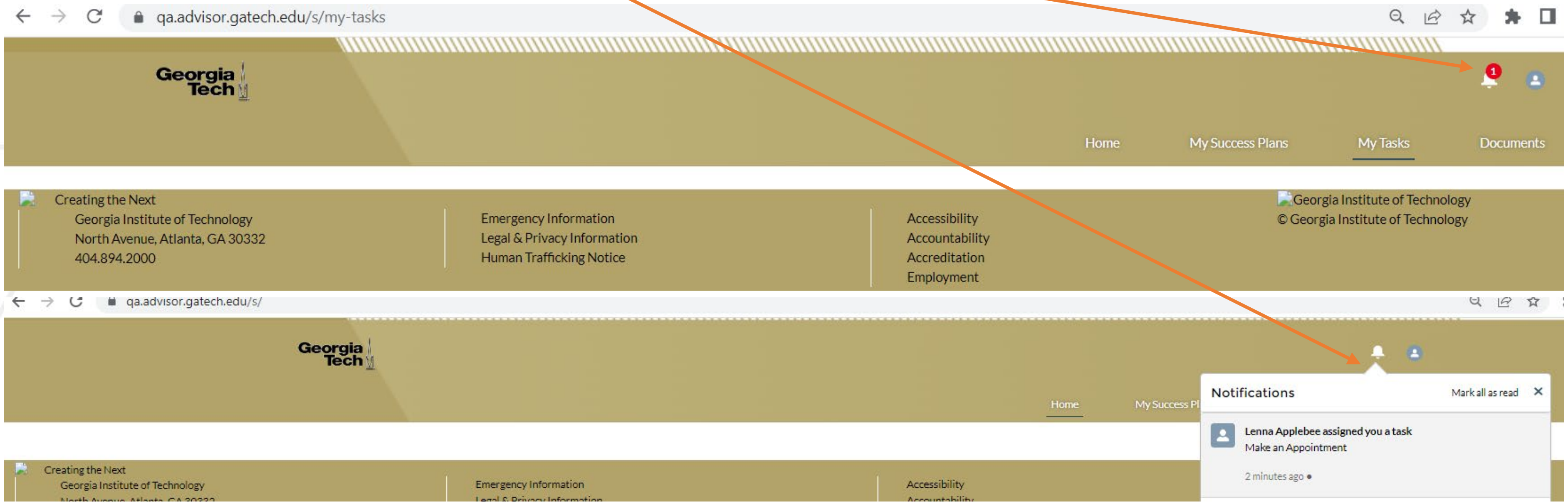
Book an appointment now by visiting https://gatech--dev3.sandbox.my.site.com/sal/s/profile/0051K000008xopNQAQ

Students must make an appointment with me regarding D grades.

For more details, click the following link:

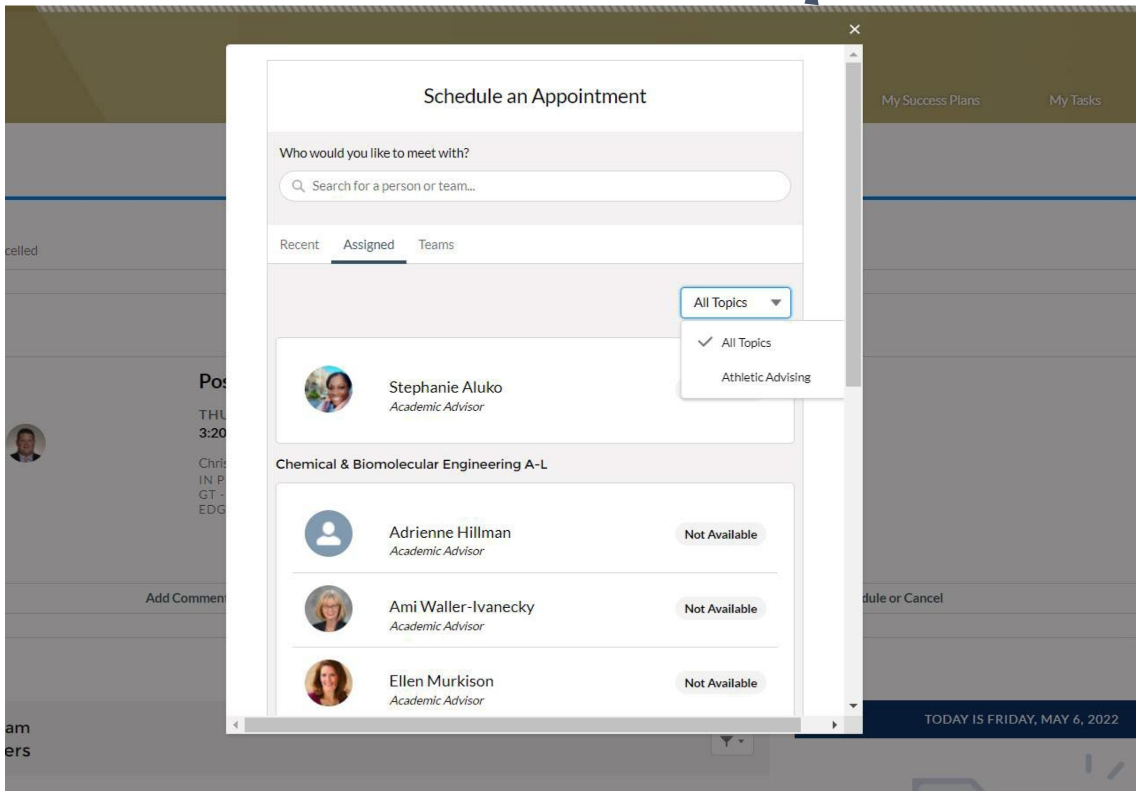
https://qa.advisor.gatech.edu/00TP000000O6nIT

2. A notification bell icon shows up on their student portal to indicate about new task being created.



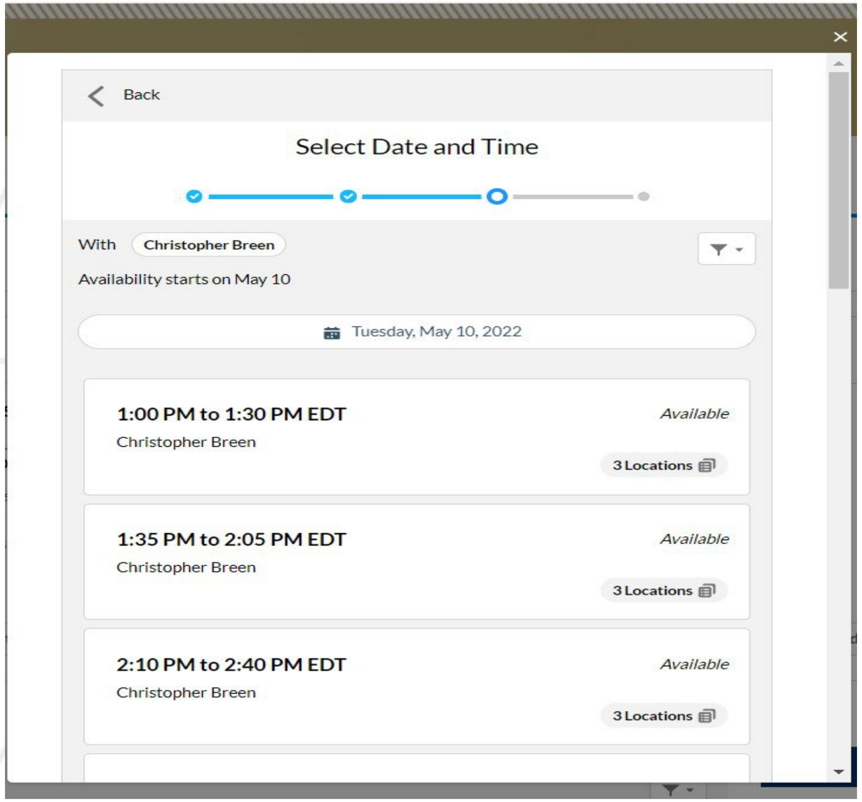
Student View: Schedule an Appointment - As a Student

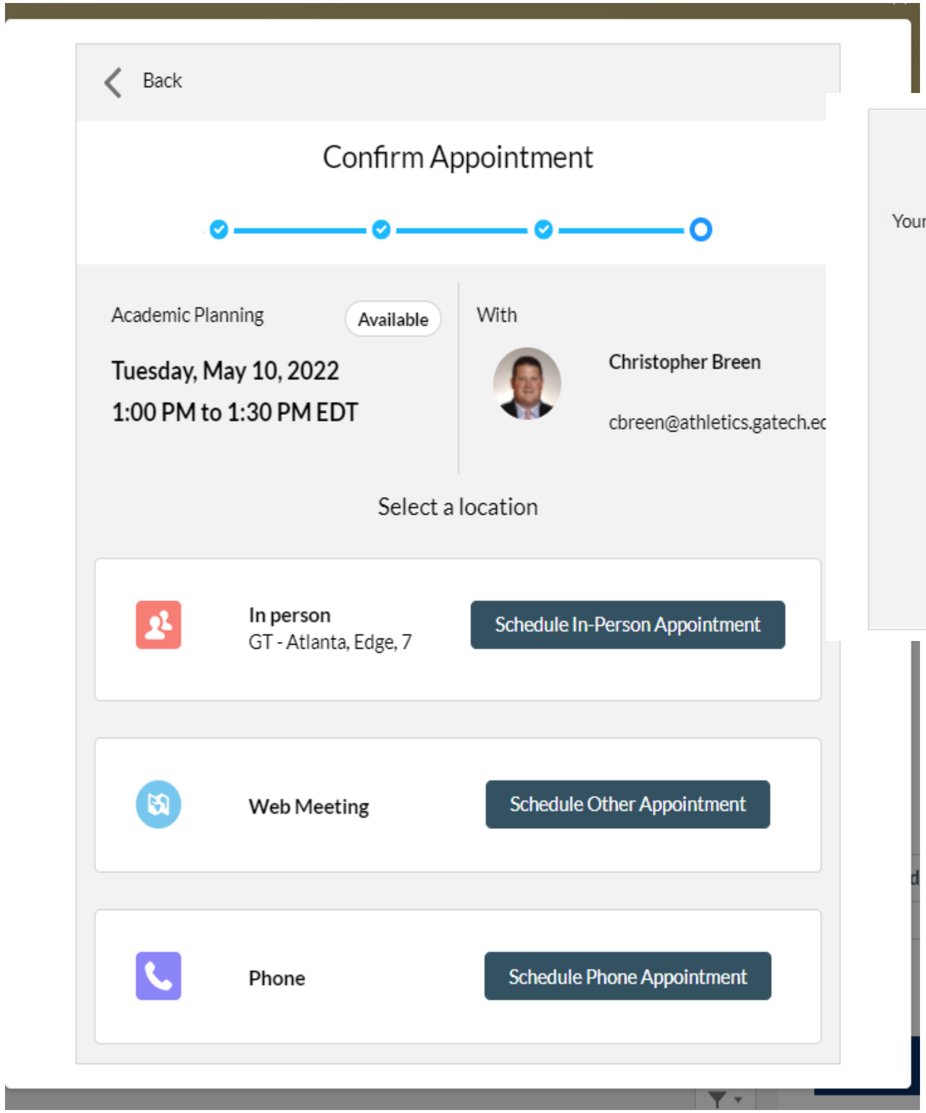
- Click “Schedule an Appointment” and follow appointment wizard

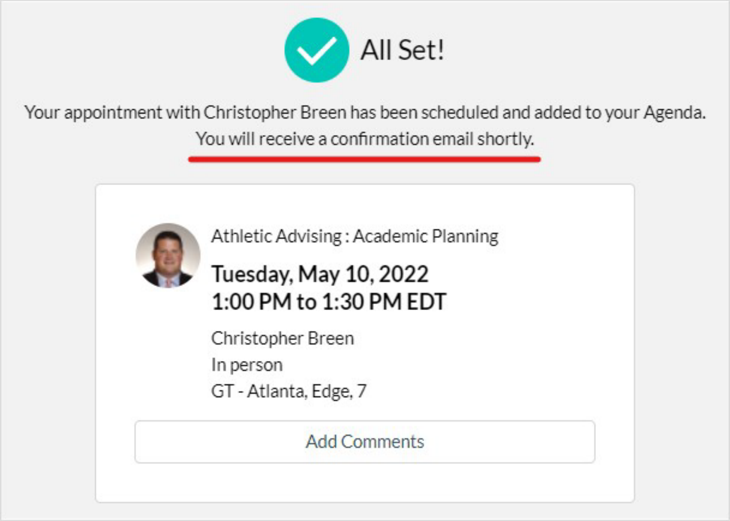


Student View: Schedule an Appointment - As a Student

- Choose your Date/Time
- Choose your location
- Confirmation Screen will show successfully scheduled appointment!

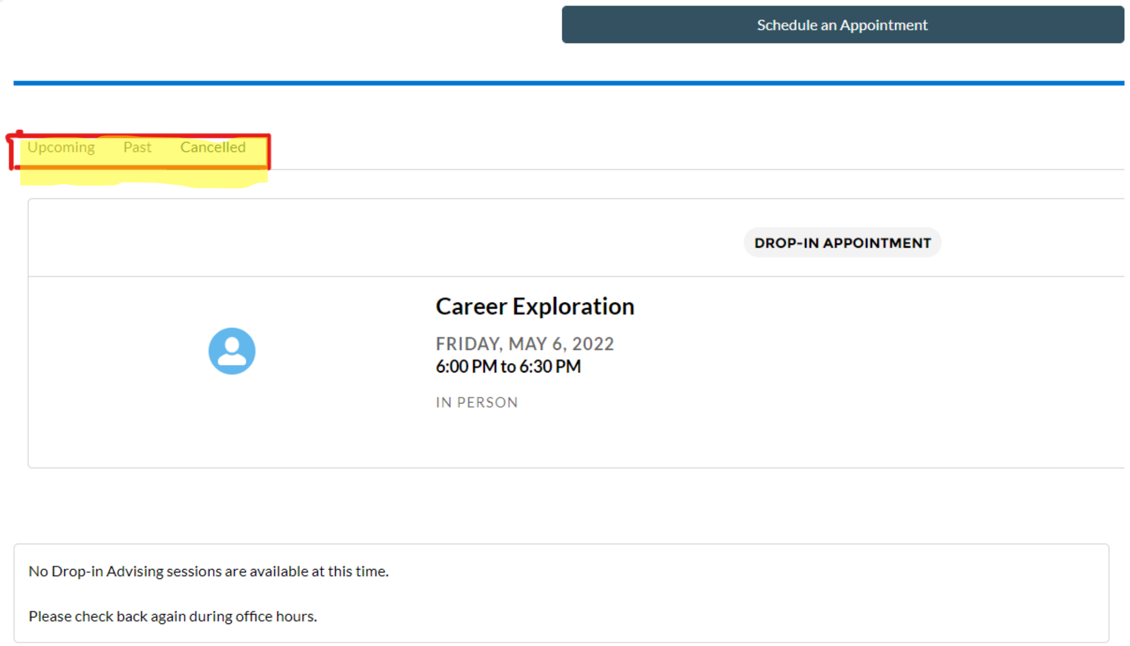


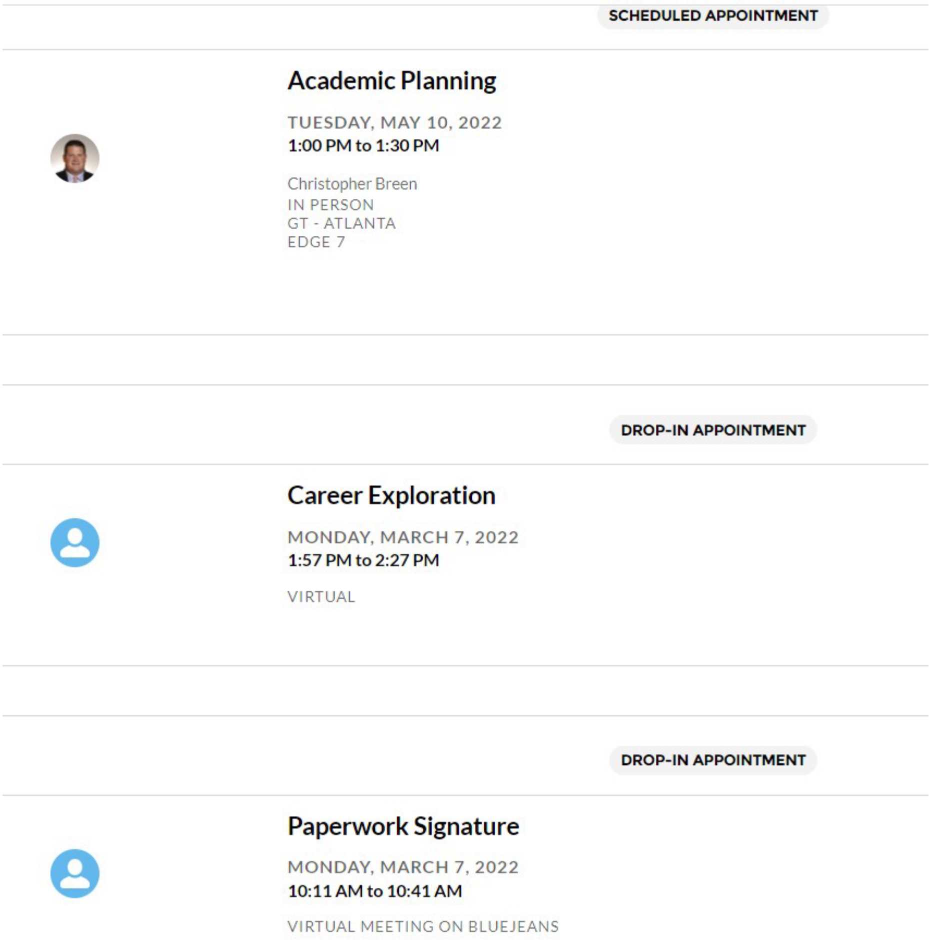




Student View: Manage Appointments – As a Student

- Students can view upcoming past and cancelled appointments, schedule a new appointment and manage upcoming appointments from the Community





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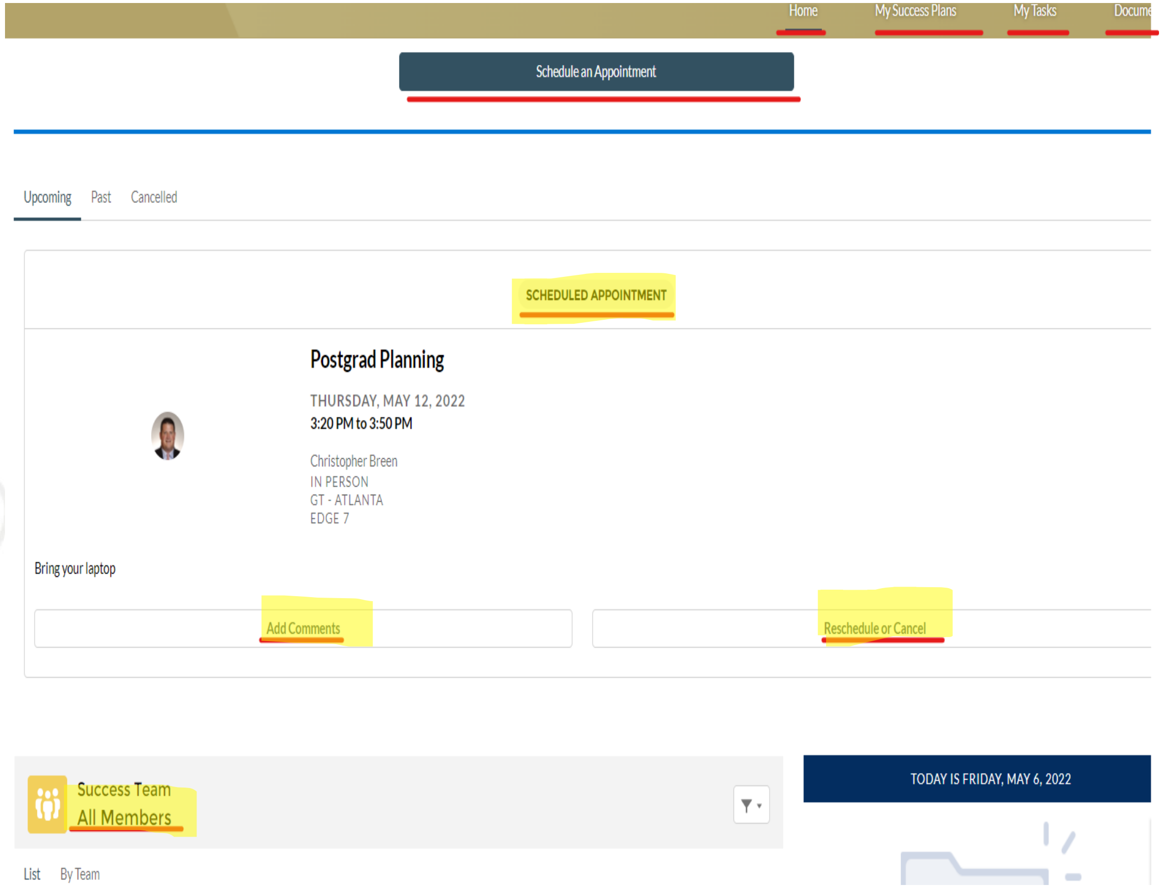
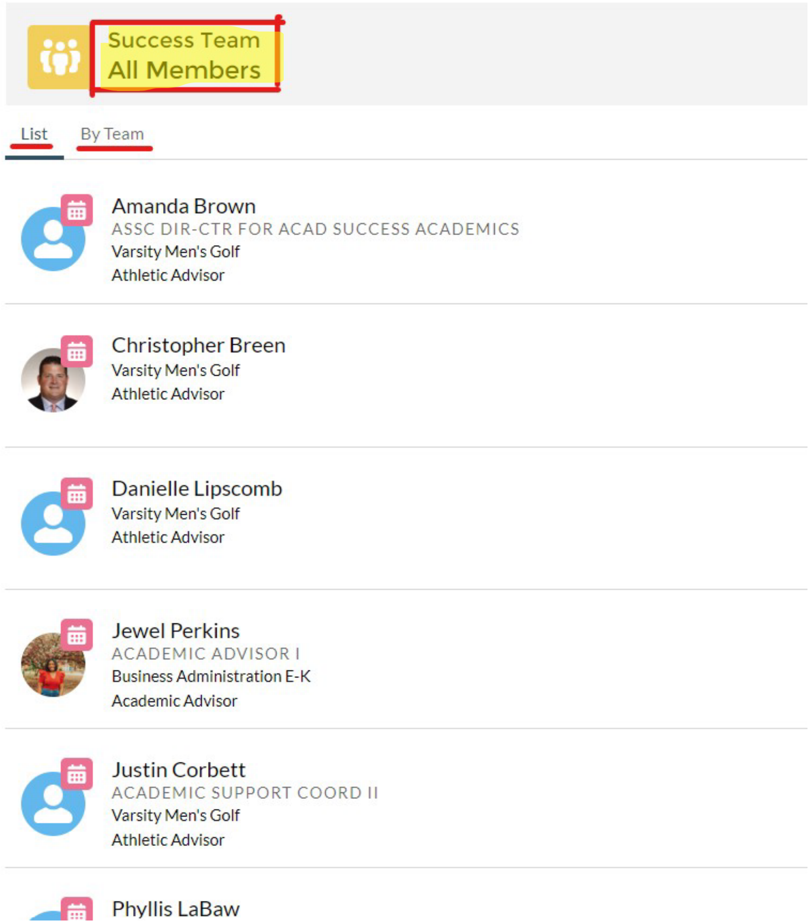
Student Community View

- Students can login to the Student Advisor Link Community to connect with their advisors and view related data.
- Students access it via advisor.gatech.edu





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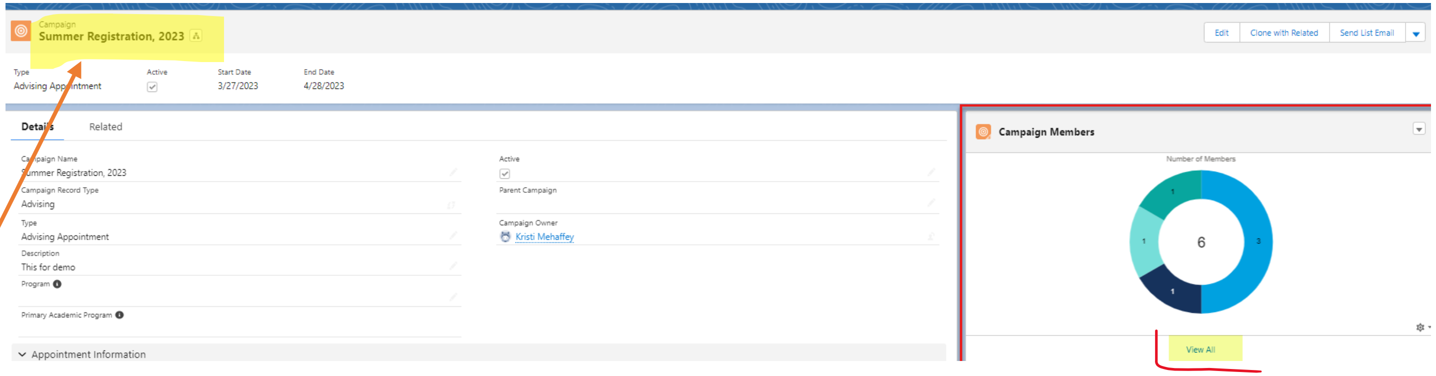
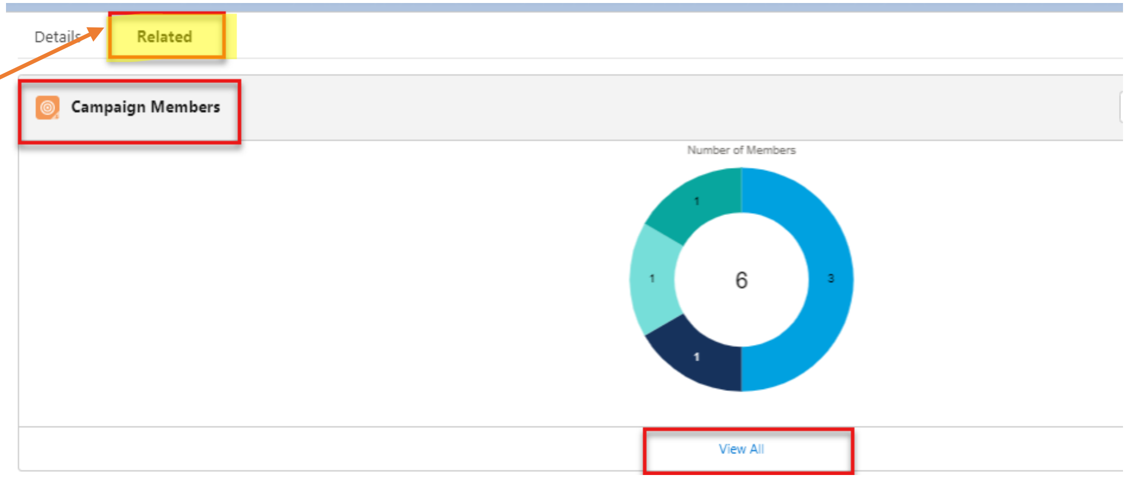
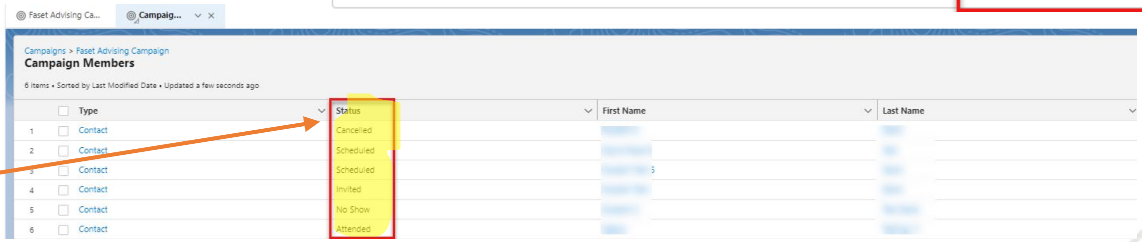
Manage Advising Appointment Campaign Responses

Manage Appointment Campaign Responses

1. Go to Campaign Members by clicking **View All** on
   a) Campaign Members option on Campaign Page
   b) Related Page
2. View **Status** field







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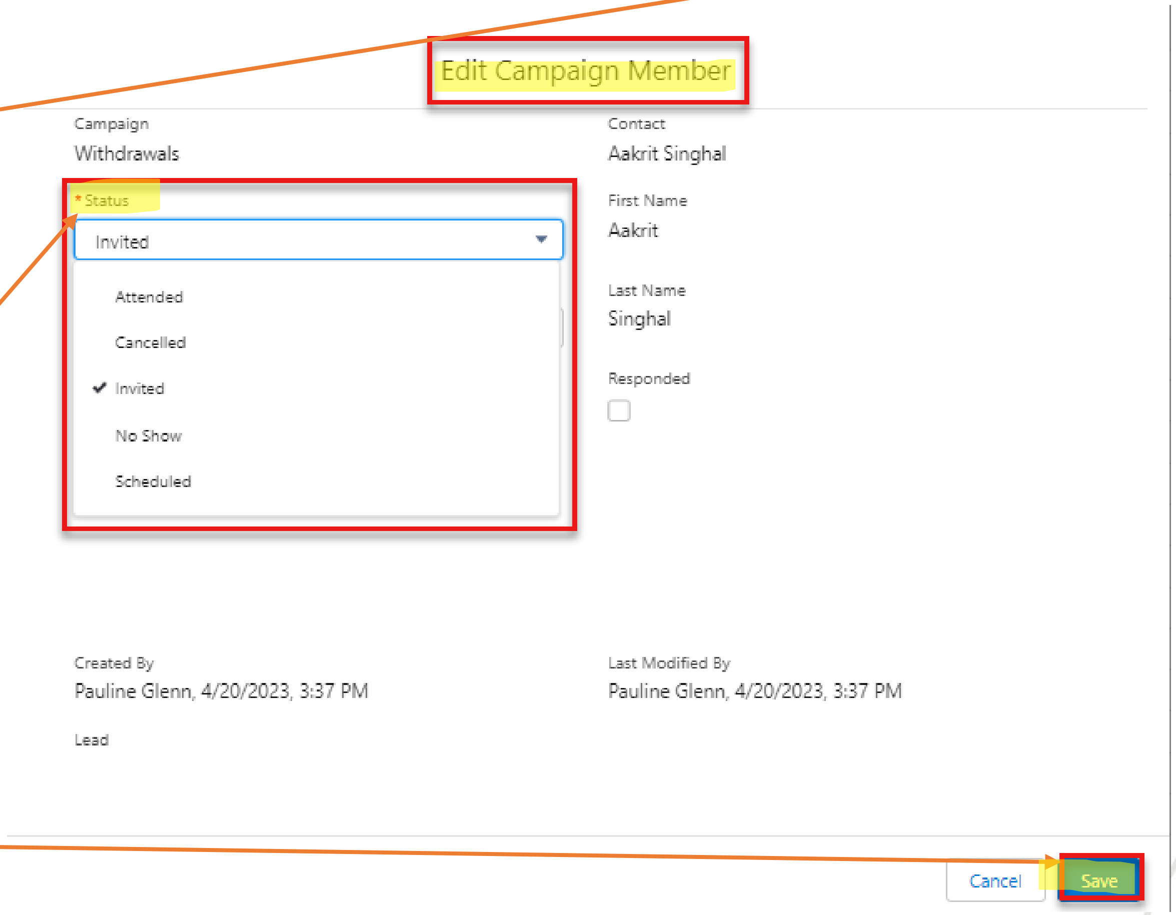
Manually update Appointment Campaign Responses

Campaign Member status change automatically in real time. If needed, the status can be manually changed as well. Follow the steps below to make the changes manually:



1. Go to Contact and go to drop down option on extreme right and click **EDIT**

2. Edit Campaign Member Page shows up

3. Click the **Status** field and choose any Status

4. Click **Save**

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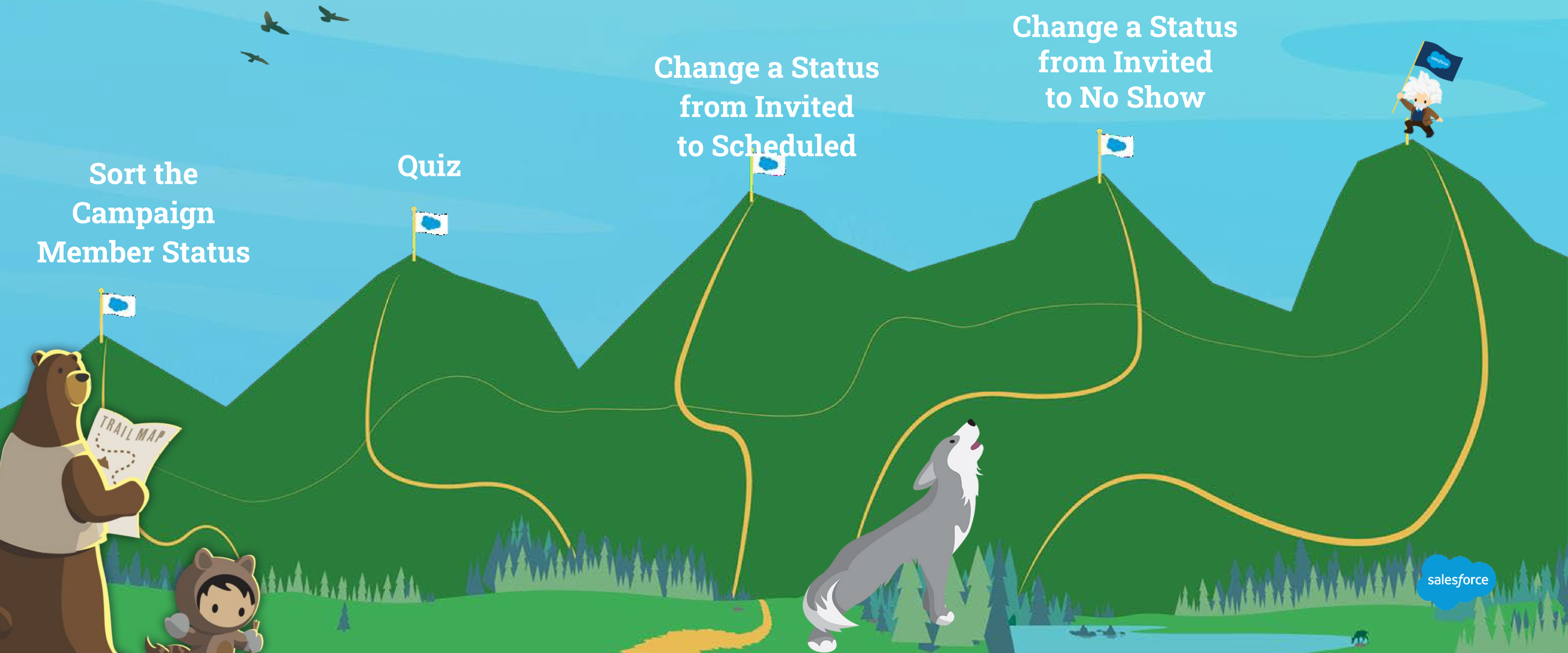
HOTS: Hands On Training Session (Demo)



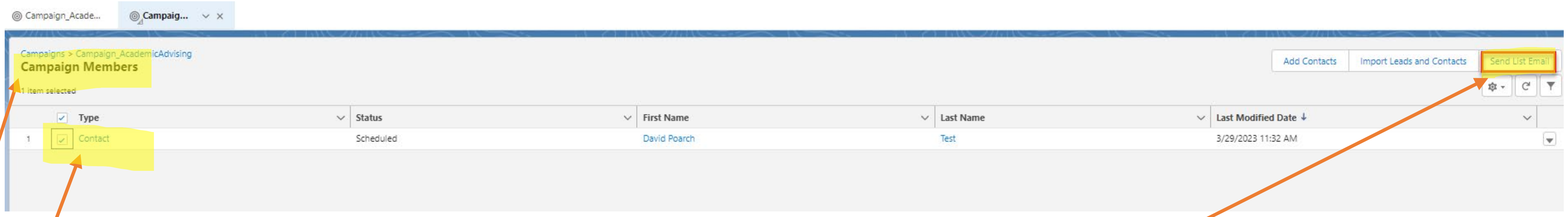
HOT: Exercises (5 minutes)

1. Go to Campaign Members on Advising - Summer Registration Campaign page, try to sort Status alphabetically .
2. How many Campaign Members do you see on Advising - Summer Registration?
3. Change the Status to “No Show” on George Burdell or an Advisee
4. Change the status to “Scheduled” on Buzz Aldrin, or an Advisee

Send an Email List

Send List Emails

If a student or a group of students need a nudge or reminder, an advisor can send them list email from the Campaign Members page. Follow the steps below:



1. Go to the Campaign Member Page
2. Select the contacts from the Campaign Member Page
3. Click Send List Email button on top right corner of the page

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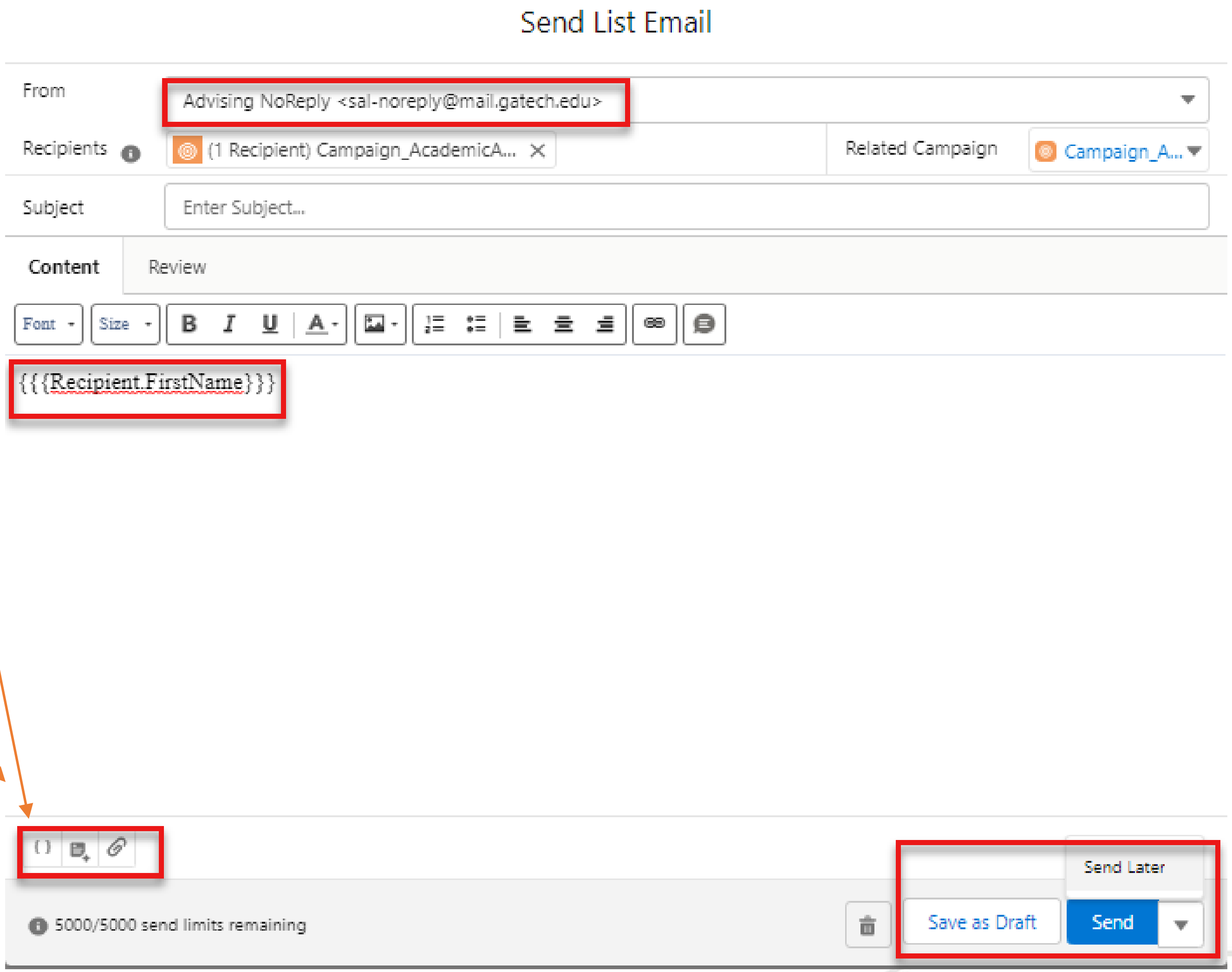
Send List Emails........Contd

1. Select Merge Field { } from the bottom left corner
2. Select a Template from the bottom left corner or write your own email
3. Insert an attachment
4. Send or Save as draft or send later

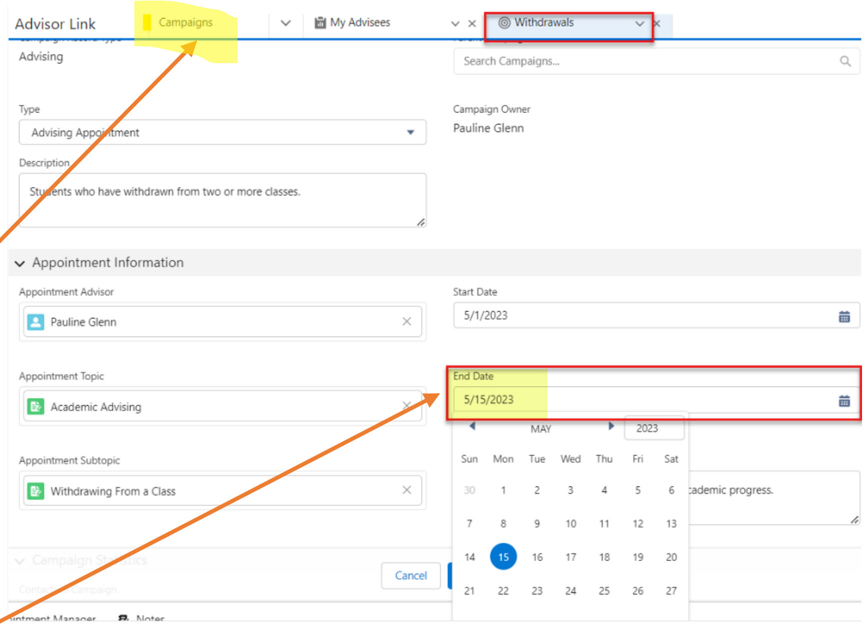


Extend the End Date on a Campaign

Extend End Dates of Appointment Campaigns

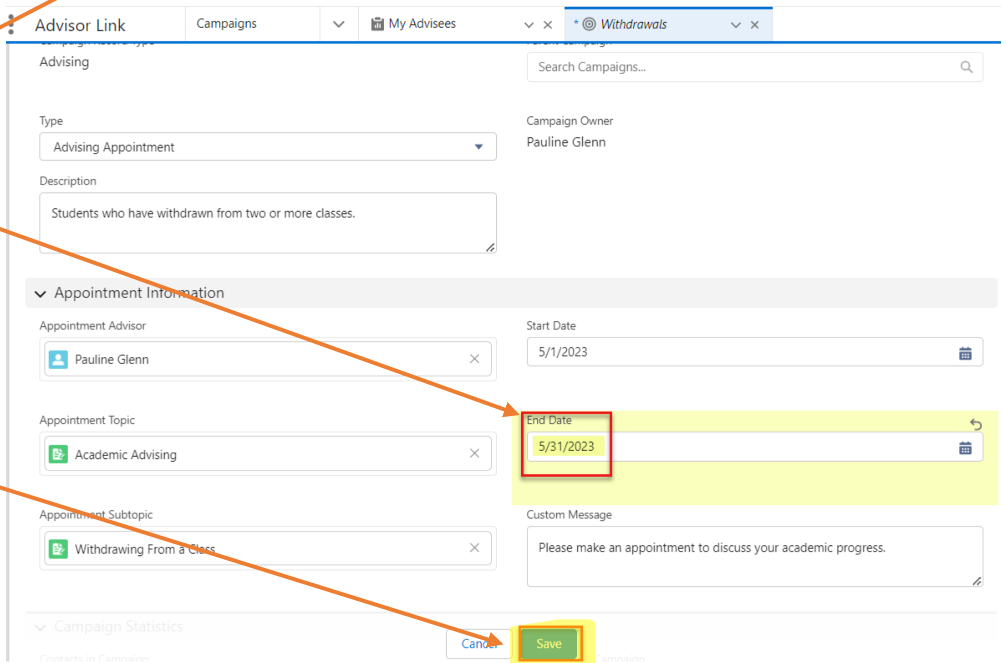
If an Advisor needs to extend timeline on a Campaign, they can do so by extending End Date on a Campaign. Follow the steps below:

1. Select a Campaign where you want to extend the end date

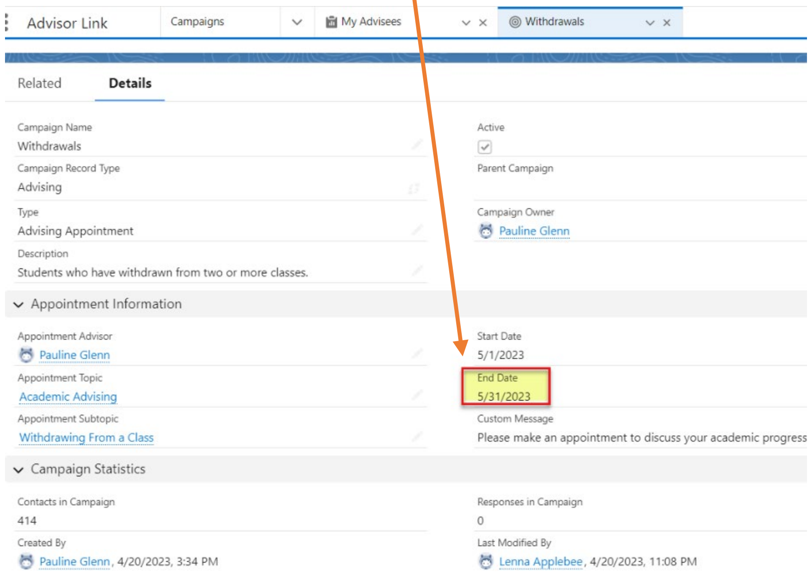


2. Go to the End Date, change the date to desired end date

3. Save



4. End date is now extended for the selected Campaign



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Clone a Campaign

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Clone a Campaign

1. Go to Campaigns

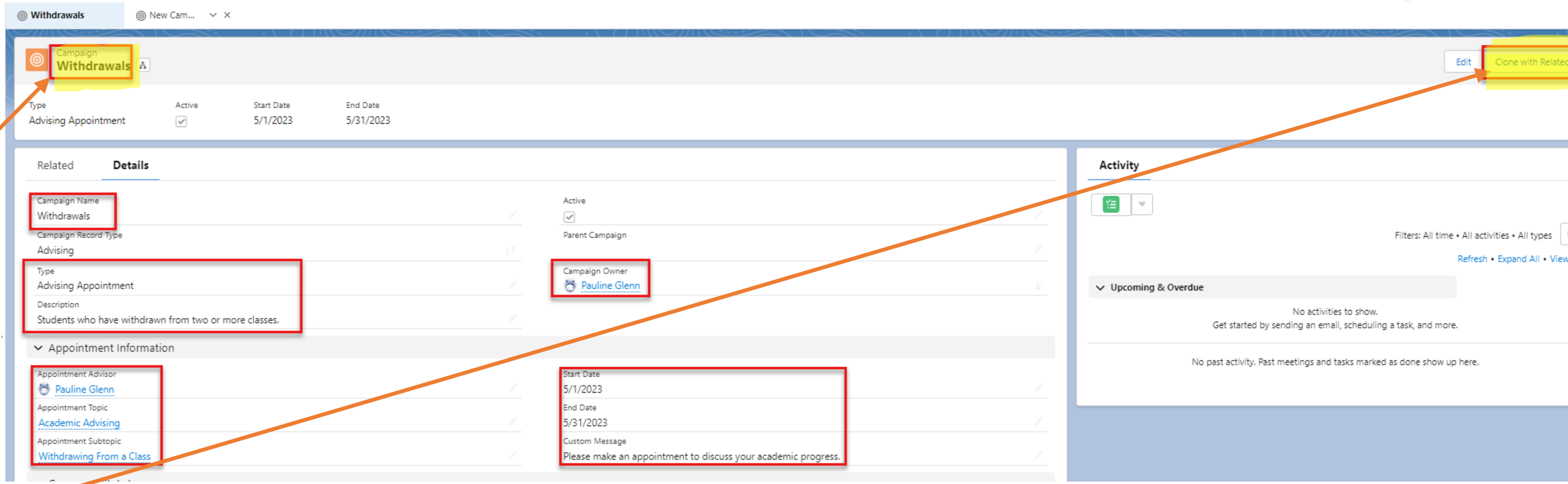
2. Select a Campaign that you want to Clone

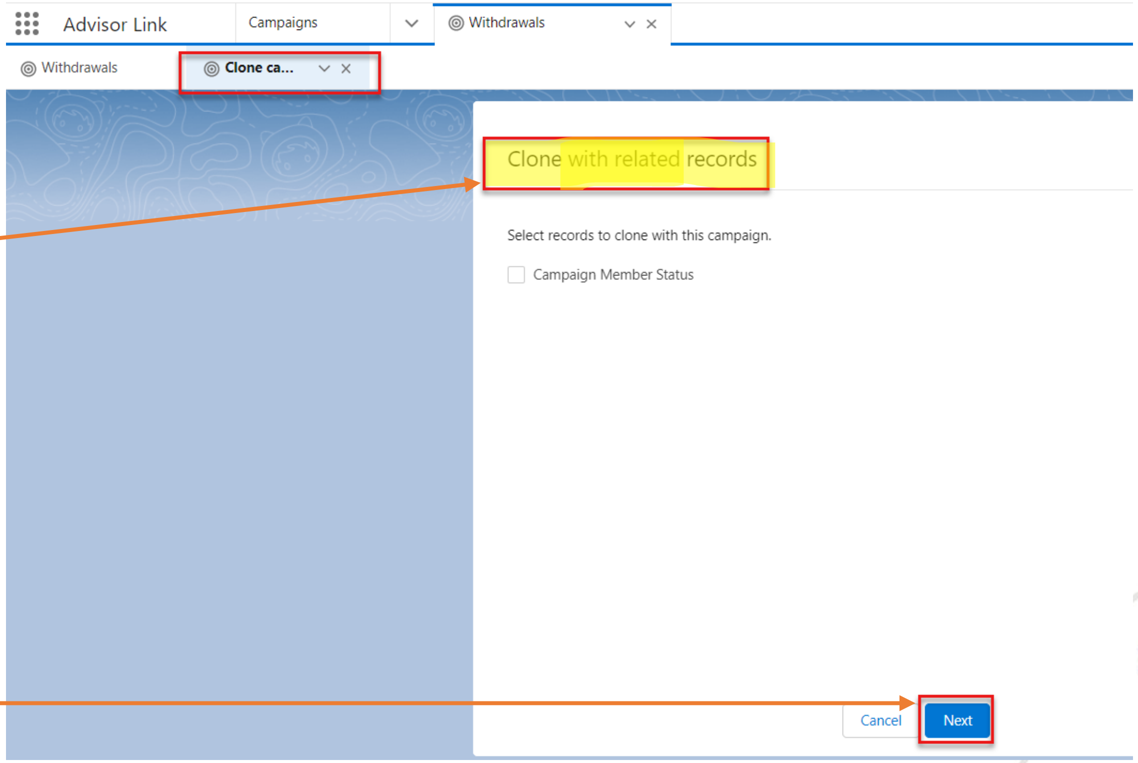
3. Click a button "**Clone with Related**" on the top right of the page

4. A new page shows up, **Clone with related records**

5. An option is given to select with campaign member status- keep it unchecked

6. Click **NEXT**

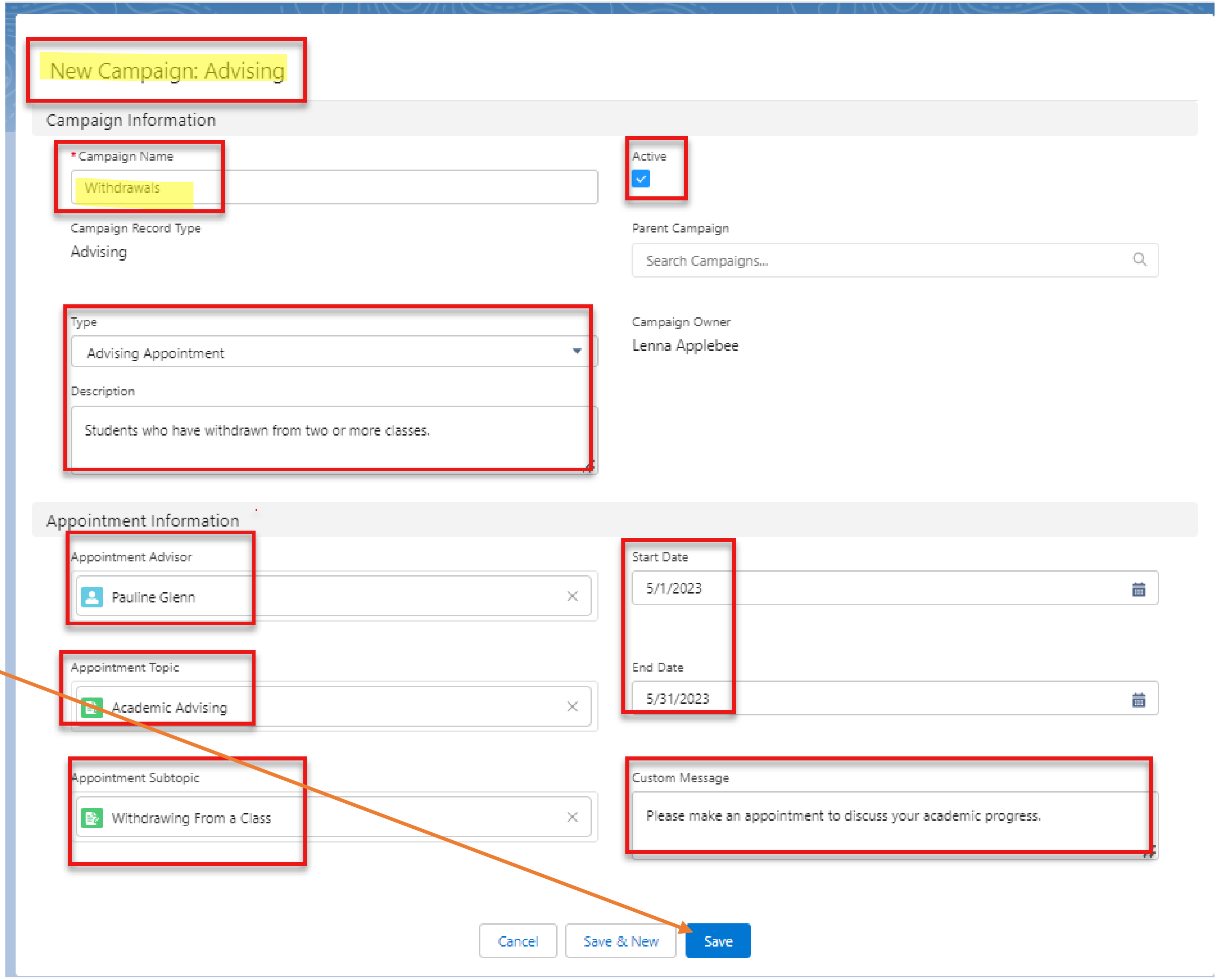




Clone a Campaign……Contd..

1. Fill or change any fields details on the Campaign Page

2. Click **SAVE**



HOTS: Hands On Training Session (Demo)

HOT: Exercises (10 minutes)

1. Change the End Date on Summer Registration Campaign by 30 days
2. Clone Advising- Summer Registration Campaign and name as Advising- Fall Registration
3. Add Campaign Members from a Report – My Advisees to Advising- Fall Registration

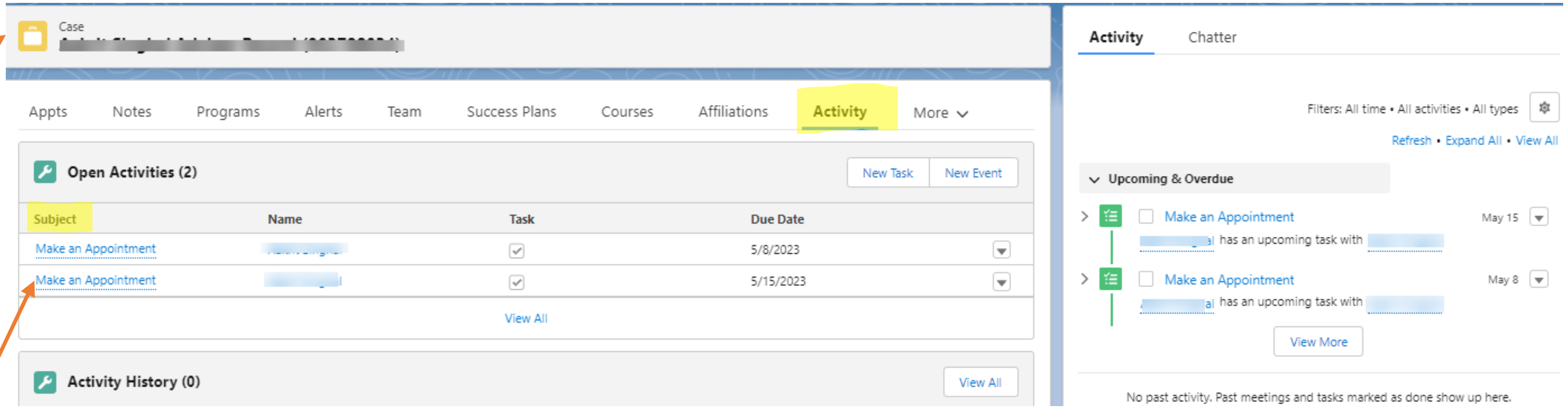
Advisee Record View on Advisor Link

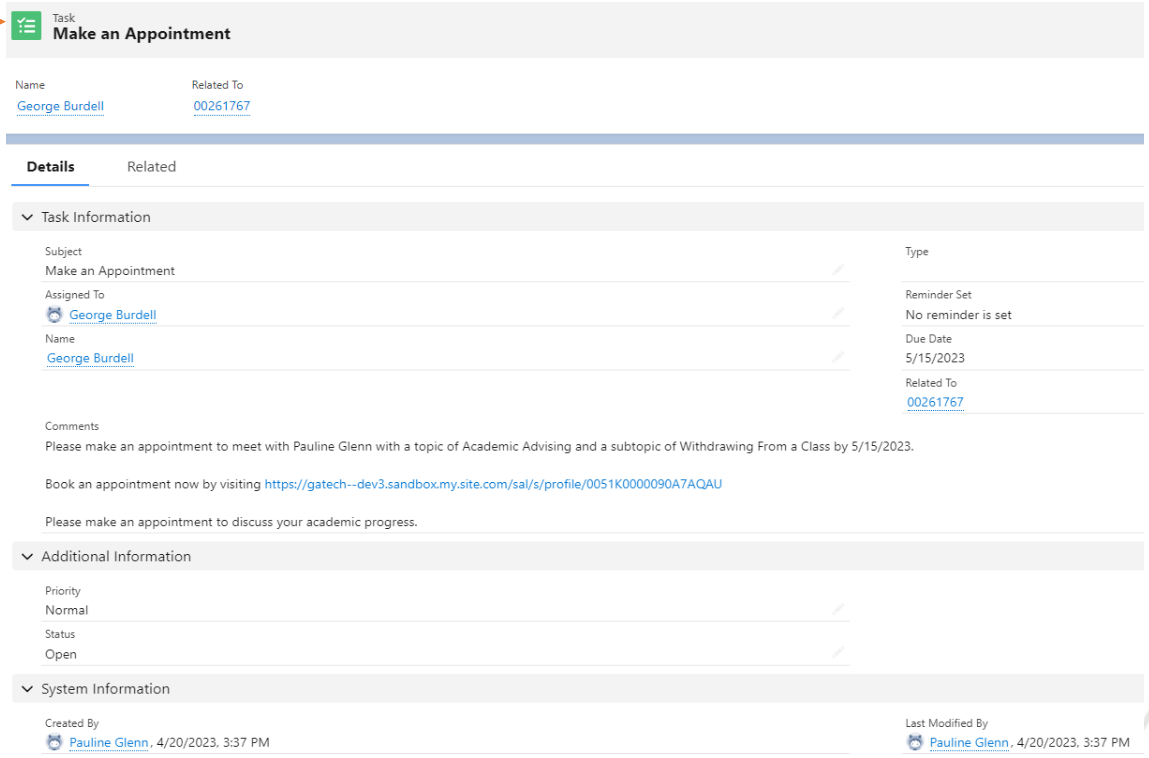
See Students' Notification on Task/Activity on Advisee Case Record

1. Go to your advisee case record.

2. Click Activity

3. Select the subject that you want to view for more details on an activity





See Student Appointment on Advisee Case Record Appointments

Lists advising appointments:

- Upcoming
- In the past

To open an appointment, click on the Topic link

Appts | Notes | Programs | Alerts | Team | Success Plans | More

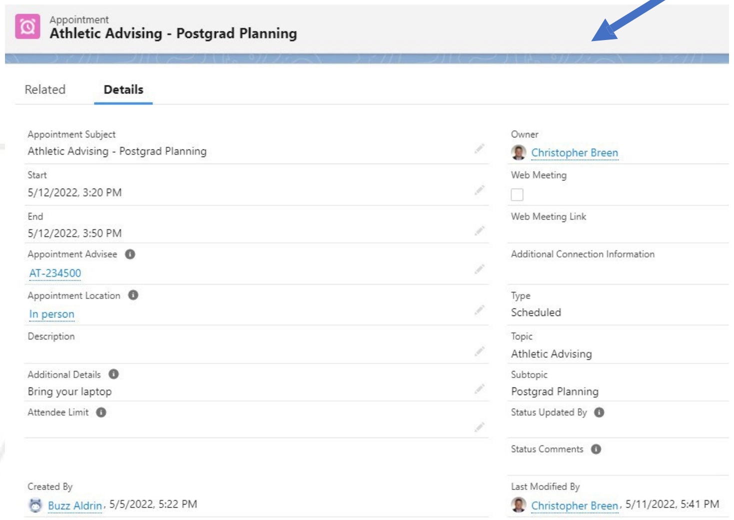
Upcoming Appointments (1)

New Appointment

TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Athletic Advising	Postgrad Planning	Christopher Breen	Attending	5/12/2022, 3:20 PM

Past Appointments (11)

TOPIC	SUBTOPIC	OWNER	STATUS	DATE
Athletic Advising	Academic Planning	Christopher Breen	Attending	5/10/2022, 1:00 PM
Academic Advising	Paperwork Signature	Ellen Murkison	Attending	2/15/2022, 8:56 PM
Academic Advising	Petitions to Faculty	Paul Fincannon	Attending	2/9/2022, 1:18 PM
Career Advising	Resume/Portfolio Review	Paul Fincannon	Attending	1/31/2022, 2:46 PM
Career Advising	Career Exploration	Paul Fincannon	Attending	1/21/2022, 4:43 PM



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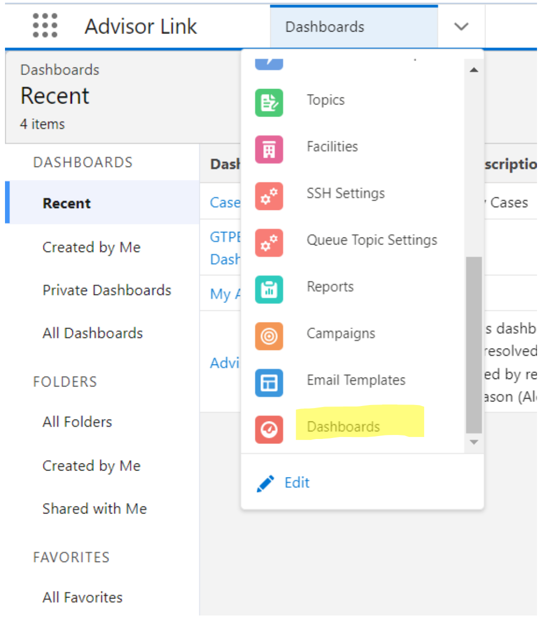
Reports and Dashboards

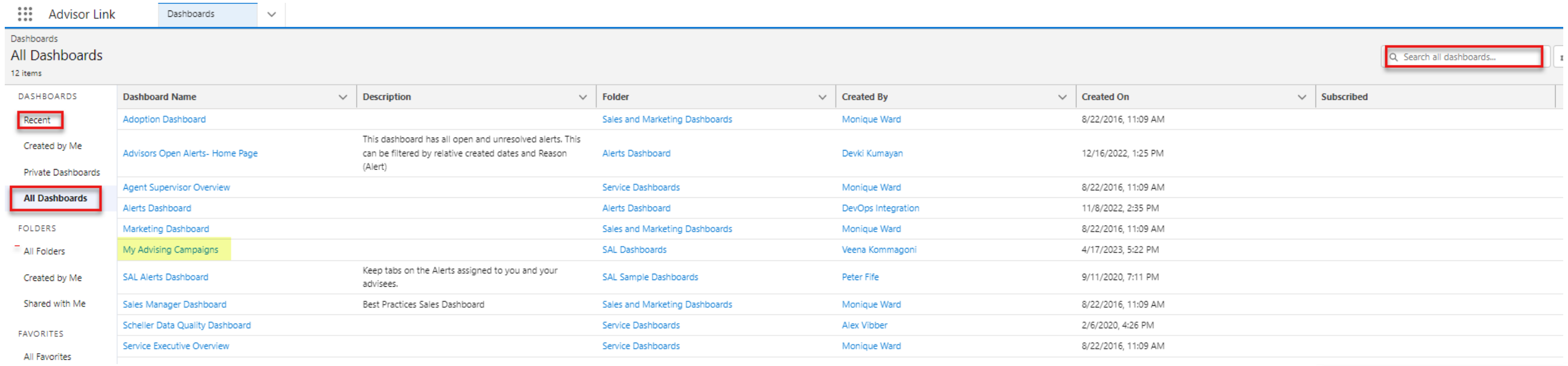
View Appointment Campaign Dashboards

1. Go to Dashboard using App Launcher or Navigation Menu



2. Choose My Advising Campaign Dashboard from the

✓All Dashboards
✓Recent items
✓Dashboard search bar on top right corner



Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Adoption Dashboard		Sales and Marketing Dashboards	Monique Ward	8/22/2016, 11:09 AM	
Advisors Open Alerts- Home Page	This dashboard has all open and unresolved alerts. This can be filtered by relative created dates and Reason (Alert)	Alerts Dashboard	Devki Kumayan	12/16/2022, 1:25 PM	
Agent Supervisor Overview		Service Dashboards	Monique Ward	8/22/2016, 11:09 AM	
Alerts Dashboard		Alerts Dashboard	DevOps Integration	11/8/2022, 2:35 PM	
Marketing Dashboard		Sales and Marketing Dashboards	Monique Ward	8/22/2016, 11:09 AM	
My Advising Campaigns		SAL Dashboards	Veena Kommagoni	4/17/2023, 5:22 PM	
SAL Alerts Dashboard	Keep tabs on the Alerts assigned to you and your advisees.	SAL Sample Dashboards	Peter Fife	9/11/2020, 7:11 PM	
Sales Manager Dashboard	Best Practices Sales Dashboard	Sales and Marketing Dashboards	Monique Ward	8/22/2016, 11:09 AM	
Scheller Data Quality Dashboard		Service Dashboards	Alex Vibber	2/6/2020, 4:26 PM	
Service Executive Overview		Service Dashboards	Monique Ward	8/22/2016, 11:09 AM	

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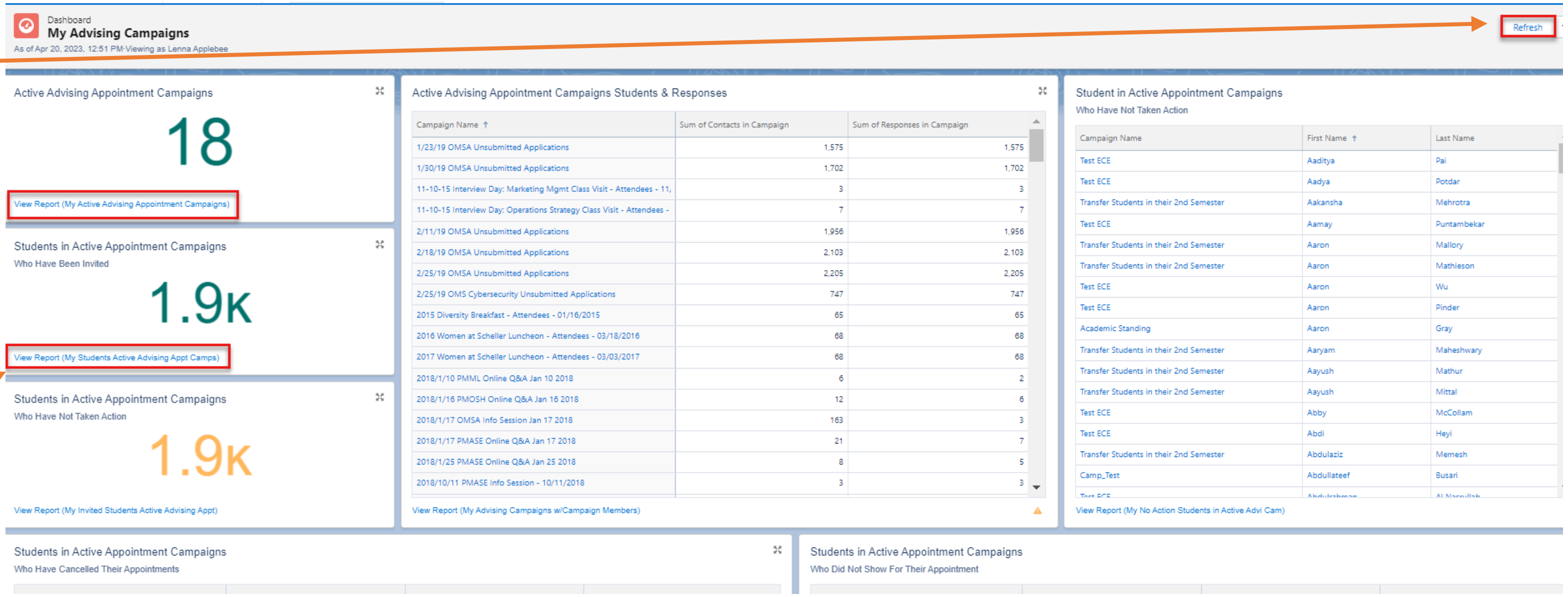
View Appointment Campaign Dashboards … Cont'd

1. Use Refresh on top right corner of page to see latest data on dashboard

2. Click the link below on a component to dig into report that supports the dashboard component view

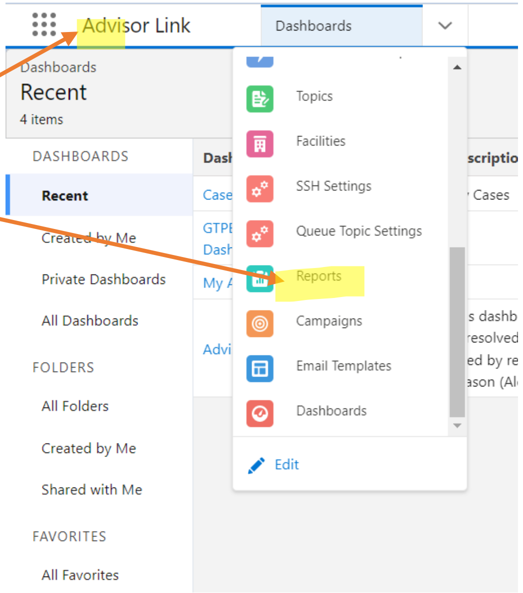


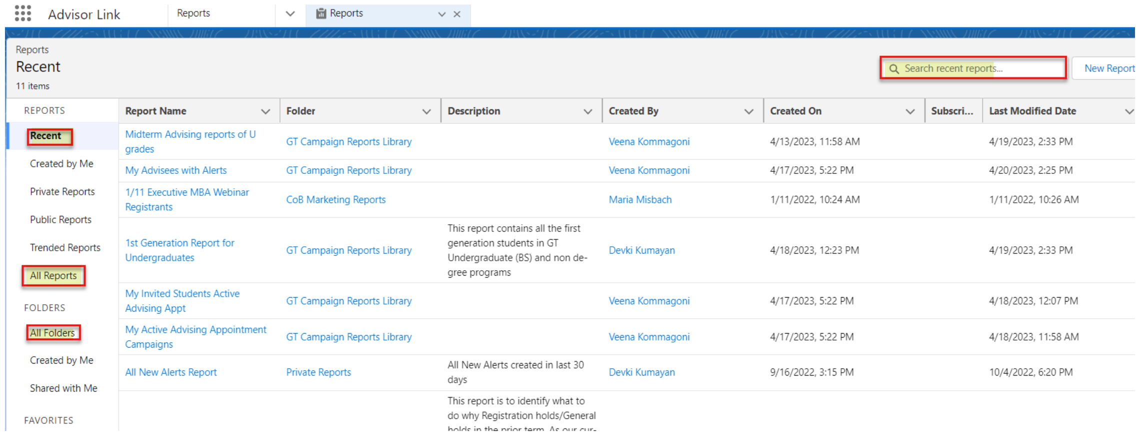
View Appointment Campaign Reports

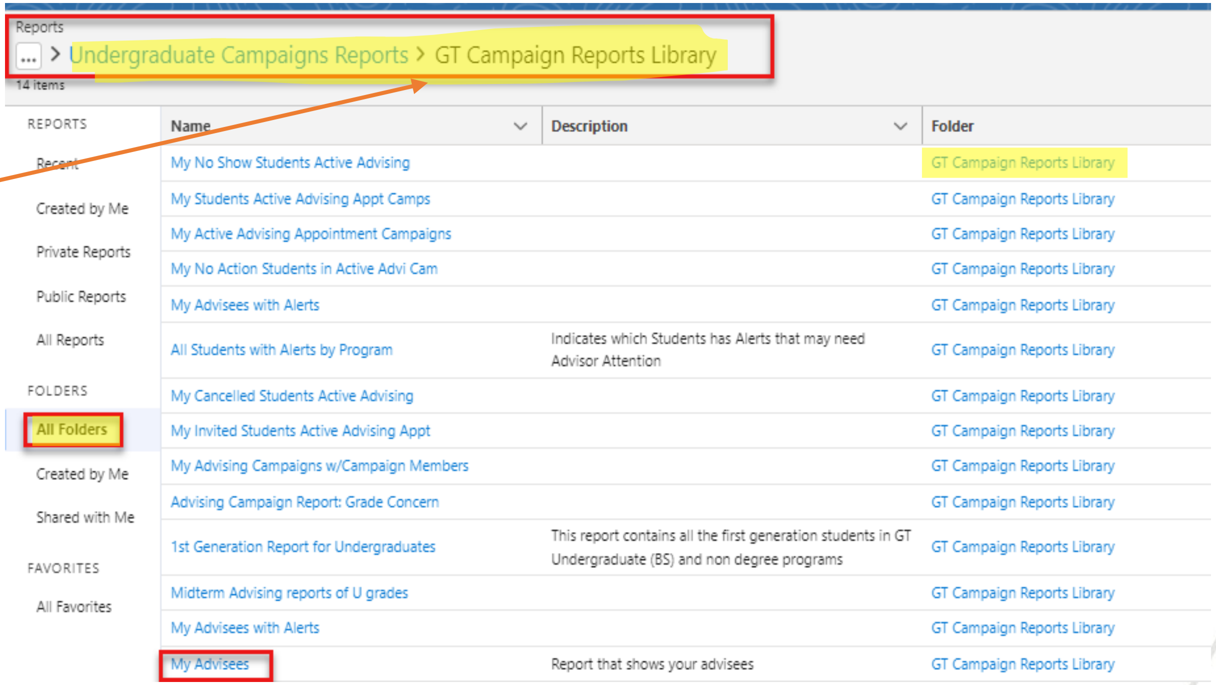
1. Click Reports from Navigation Menu or App Launcher

2. Search for reports using
   a) Tabs on Left –ALL reports & search bar on top right of the page

   b) Go to All Folders (Undergraduate Campaign Folder) & look for a specific subfolders if available (GT Campaign Reports Library) and find the report manually or use the search bar at the top right of the page







HOTS: Hands On Training Session (Demo)

HOT: Exercises - Working with My Students Active Advising Appointment Campaigns Reports (5 minutes)

1. Go to the reports via Folder/All reports
2. Search for the report- My Students Active Advising Appt Camps .
3. Edit, change the filters to match your report criteria
4. Add a filter “Appointment Advisor” equals “Your Name"
5. Save the new report in your department folder with new name
6. Add the newly created report to a desired campaign

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HOT: Exercises - Working with My Students with Alerts by Program Report (5 minutes)

1. Go to the reports via Folder/All reports
2. Search for the report- **All Students with Alerts by Program**
3. Click Edit and add filter criteria
   - ✓Primary Academic Program ="BS in Your Program Name"
   - ✓Reason = Open Incomplete
4. Save the new report in your department folder with new name
5. Add the newly created report to a desired campaign

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HOT: Exercises – Generating New Reports to Add Students to Appointment Campaign (10 minutes or Homework)

1. Go to Reports
2. Choose the report type, report format
3. Select the fields you want to view on report
4. Select the filters
5. Add a description
6. Save As

Salesforce User Group Presentation - Reports Basics.pptx

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Support Resources

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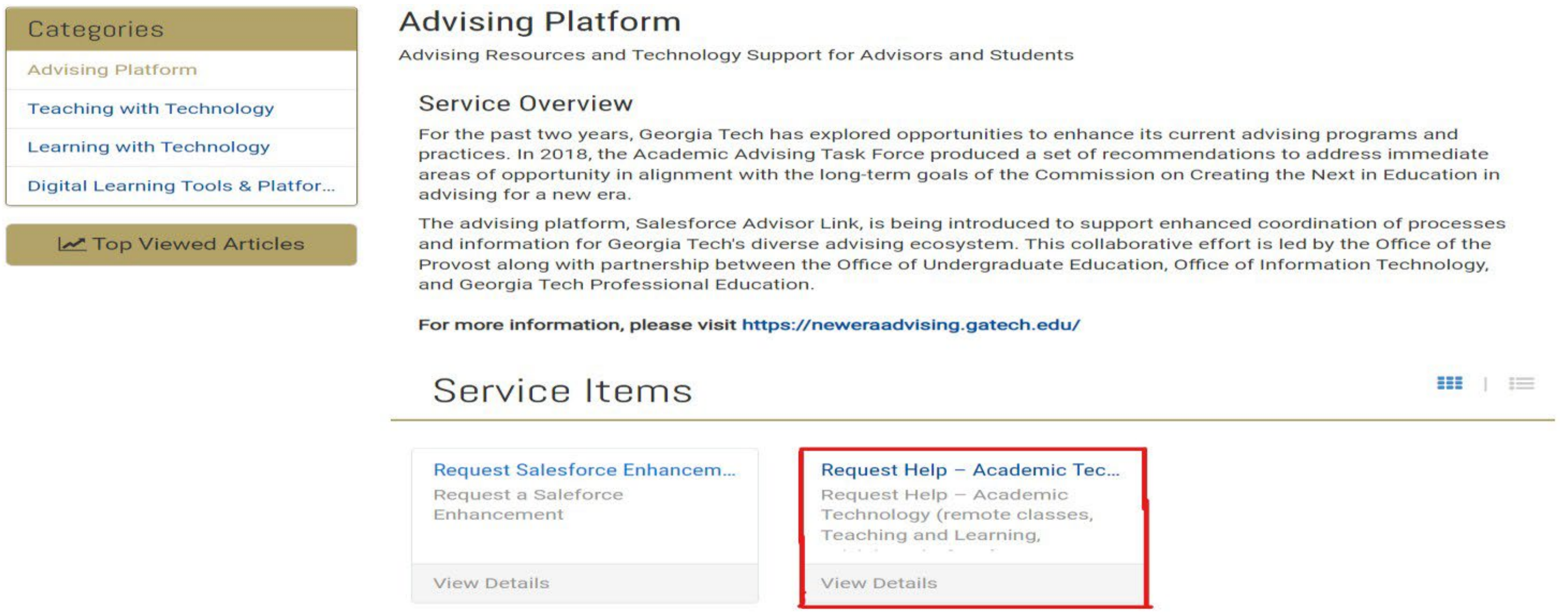
Get Help After Go-Live: May 1, 2023

On 05/01/2023, Campaigns will be in production, and support will be provided using the Georgia Tech Enterprise Service Desk powered by ServiceNow:

- Access services.gatech.edu
  - Choose the "Teaching and Learning" tile
  - Select "Advising Platform (Advising Resources and Support for Advisors & Students)"
  - Then, complete the support form.: [Advisor Link Support Request]



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Get Help After Go-Live: May 1st, 2023

- Support will be directed to:

Functional Support (OUE)

Examples:

I need help locating my active campaigns.

Technical Support (OUE and OIT)

Examples:

I can't log into the Advisor Link Interface.

I'm getting the following error message.

Salesforce Advisor Link Support Model

Advisor Link Support Request

Tier 1 Triage

Basic Troubleshooting with Knowledge

- Enterprise Service Desk

Tier 2

End User Advising Support, Limited System Admin Capability

- Undergraduate Advising (OUE)
- GTPE Online Programs & Professional Masters

Tier 3

Platform & System Administration, Application Configuration, Troubleshoot SSO/EDW/Banner/Ethos/MuleSoft, Vendor Escalation (SAL, Riva)

- Office of Information Technology CRM Services

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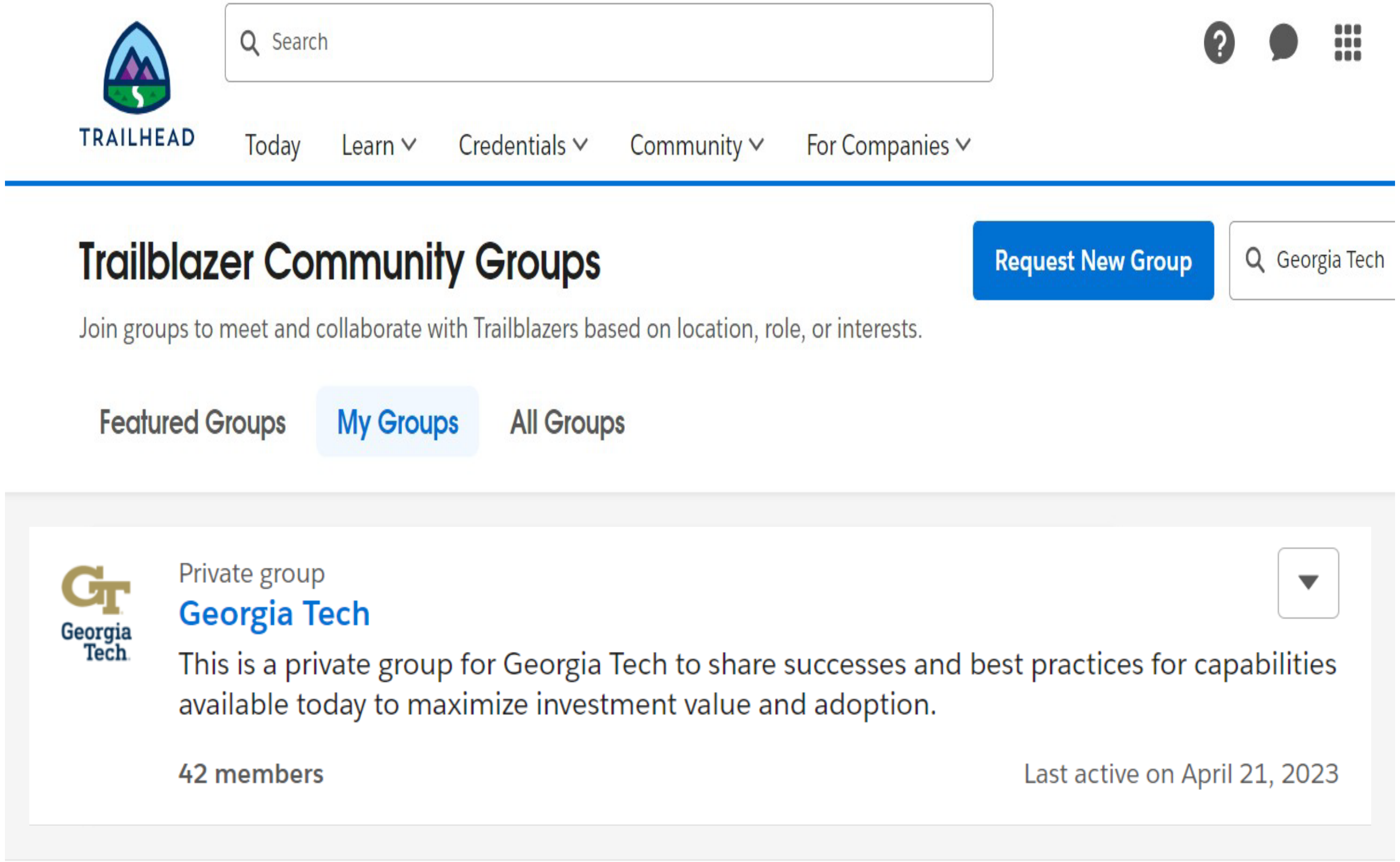
Salesforce Advisor Link Resources

Join Georgia Tech Community on Trailblazer

- Create a Trailhead account at [Salesforce Trailhead]
- Go to Community
- Search for Georgia Tech Group
- Request to become a member



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Salesforce Advisor Link Resources

- Salesforce User Community: Connect with other users in the Salesforce Trailblazer community.
  - Learn relevant skills and more

- Salesforce Basics- Reports : 2-hours
- Salesforce Campaign Reports : 5-minute overview
- Salesforce Trailheads - Student Success Hub/Advisor Link : Salesforce web-based training modules about the product

- Advisor How-To Guides: Advisor job aids created by Georgia Tech

- Getting Started using SAL: Basic end user WBT module developed by Georgia Tech

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Log into Advisor Link PROD

Advisors: gatech.my.salesforce.com

- Use your standard GT Account for Single-Sign On

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Access to the QA Sandbox

This is a Hands-on training workshop designed to engage attendees with the **basic features** of Advising Campaigns.

- **Please log into the QA/TEST instance:** **https://gatech--qa.sandbox.lightning.force.com**
- This QA/TEST instance is available from April 26 to May 19th, 2023
- You are encouraged to practice the HOTS (hands on trainings) exercises during and after today's workshop so:
  - To become familiar with the functionality in Test
  - To better identify the type of support you need
  - To better serve and engage with your students

Advising Campaign Support Office Hours	
May 1	3:00 – 4:00 PM
May 2 – May 5	11:00 AM – Noon
May 8	3:00 – 4:00 PM
May 9 – May 12	11:00 AM - Noon

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Questions and Next Steps

Thank you!

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Thank You!

We encourage you to use the QA Test Environment to become comfortable with the platform.

Please log into your QA Sandbox using : https://gatech--qa.sandbox.lightning.force.com/lightning/page/home

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