



# modern<sup>®</sup> campus

Engaging Modern Learners  
For Life

Introduce yourself in the chat! Which institution are you here with?

# Branching Messages using Automated Keyword Response

Learn how to use your Message Template to create a thread of branched messages to provide a customized experience for your contacts!

*This webinar is most suited to account admin and program admin!*

# Branching Messages using Automated Keyword Response

Learn how to use your Message Template to create a thread of branched messages to provide a customized experience for your contacts!

*This webinar is most suited to account  
admin and program admin!*

# Agenda

1. Intro
2. Program Messages
3. Best Practices
4. Examples
5. Q&A
6. Close





“Is this being  
recorded??”

“Is this being  
recorded??”

YES!

The screenshot shows the Modern Campus Message user interface. At the top left is the logo for 'modern campus message'. At the top right is a user profile for 'Kelsey Seale'. Below the logo is a search bar with the text 'How can we help?' and a search icon. Below the search bar are three main navigation icons: 'FEATURED ARTICLES' (a checklist with a hand pointing), 'PRODUCT IDEAS' (a lightbulb with a circular arrow), and 'COMMUNITY FORUMS' (two speech bubbles, one with a question mark and one with an exclamation mark). Below these icons is a 'Resource Center' section with the heading 'Resource Center' and the subtext 'Helpful articles, tips and resources to help you make the most of Message™'. Under the Resource Center are three main resource cards: 'Contact Management', 'Webinars', and 'Best Practices for Successful Messaging'. Below these cards are three more empty resource cards.

Who is suited  
to this webinar?

# Who is suited to this webinar?

## Account Admin + Program Admin

Enrolling in Payment Plans	10 days prior to deadline	Payment_plan = FALSE AND Current_credit_hours > 0 AND Balance NOT = BLANK	Hi [first_name] or [preferred_name], it's [advisor_name]. Just a reminder that you are eligible to sign up for the payment plan <<link>> to cover your remaining balance and ensure that you will keep your enrollment status positive. Otherwise, just pay your balance no later than <b>date</b> . Sound good? Yes or No
Enrolling in Payment Plans_2	2 days prior to deadline	Payment_plan = FALSE AND Current_credit_hours > 0 AND Balance NOT = BLANK	Hi [first_name] or [preferred_name], it's [advisor_name]. Just a reminder that you are eligible to sign up for the payment plan <<link>> to cover your remaining balance and ensure that you will keep your enrollment status positive. Otherwise, just pay your balance no later than <b>date</b> . Sound good? Yes or No
Still Not Registered	10 days prior to classes starting	Last_term = Spring2021 AND Current_credit_hours = 0 AND Graduation=FALSE AND Holds = FALSE	Hi [first_name] or [preferred_name], it's [advisor_name]. I noticed you still are not yet registered for the Spring. There's still time! Are you planning on registering for this semester? 1. Yes 2. Still deciding 3. No <b>Response to 1:</b> Great - there's still time! Do you need help getting registered? Response to yes: We can definitely help! Make an appointment <<link>> here! <b>Response to 2, still deciding:</b> Thanks for letting me know. Could you tell me a little bit more about what you are thinking? <b>Response to 3:</b> Thanks for letting me know. Out of curiosity, why not? A) Transferring B) Financial difficulties C) Need a break D) Other <b>Response to A:</b> Thanks for letting me know. Where are you attending? Response to any response: Good luck! We wish you the best! Make sure to get your transcript at <<link>> <b>Response to B:</b> We are here to help with finances! Contact financial aid directly at <a href="mailto:financialaid@university.edu">financialaid@university.edu</a> or via their <a href="#">hours of operation</a> support line, ###.###.#### <b>Response to C:</b> Thanks for letting me know. Just a reminder that you have access to <a href="#">these resources</a> on campus! Hang in there and let me know when you are ready to get re-started! <b>Response to D:</b> Thank you for your response.



# Automated Keyword Response

Create branching messages

Hey Isobel! Are you still interested  
in applying to Cricket University?  
Reply yes or no.

Yeah...

Great! Here are some resources to  
get started! [www.cu.edu/apply](http://www.cu.edu/apply)

Yeah...

in applying to Cricket University?  
Reply yes or no.

modern  
campus

Great! Here are some resources to  
get started! [www.cu.edu/apply](http://www.cu.edu/apply)

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- Automated
- Personalized

# • Custom “branching”

Hey Eric! Are you still interested in applying to Cricket University?  
Reply yes or no.

No thanks...

Thanks for letting us know! You can always reach out here if you have more questions!



Hey [first\_name]+! Are you still interested in applying to Cricket University? Reply yes or no.

YES

Direct to Resources

NO

Allow for future contact

# Benefits of Automated Keyword Response

- Saves time
- Garner engagement
- Targeted info distribution
- Gather new data



# Program Messages

# Program Message

- Set up using the message template
- Functions
  - Automated keyword response
  - Event Triggered Messages

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Still Not Registered	10 days prior to classes starting	<p><u>Last_term</u> = Spring2021</p> <p>AND</p> <p><u>Current_credit_hours</u> = 0</p> <p>AND</p> <p>Graduation=FALSE</p> <p>AND</p> <p>Holds = FALSE</p>	<p>Hi [first_name], it's [advisor_name]. I noticed you still are not yet registered for the Fall. There's still time! Are you planning on registering for this semester? 1. Yes 2. Still deciding 3. No</p> <p><b>Response to 1:</b> Great - there's still time! Do you need help getting registered? Response to yes: We can definitely help! Make an appointment here <a href="http://www.cu.edu/help">www.cu.edu/help</a>!</p> <p><b>Response to 2, still deciding:</b> Thanks for letting me know. Could you tell me a little bit more about what you are thinking?</p> <p><b>Response to 3:</b> Thanks for letting me know. Out of curiosity, why not? A) <u>Transferring</u> B) Financial difficulties C) Need a break D) Other</p> <p><b>Response to A:</b> Thanks for letting me know. Where are you attending?</p> <p><b>Response to any response:</b> Good luck! We wish you the best! Make sure to get your transcript at &lt;&lt;link&gt;&gt;</p> <p><b>Response to B:</b> We are here to help with finances! Contact financial aid directly at <a href="mailto:financialaid@university.edu">financialaid@university.edu</a> or via their hours of operation support line, ###.###.####</p> <p><b>Response to C:</b> Thanks for letting me know. Just a reminder that you have access to these resources on campus! Hang in there and let me know when you are ready to get re-started!</p> <p><b>Response to D:</b> Thank you for your response.</p>	Save responses A/B/C/D to not_registering_term
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# Message Template

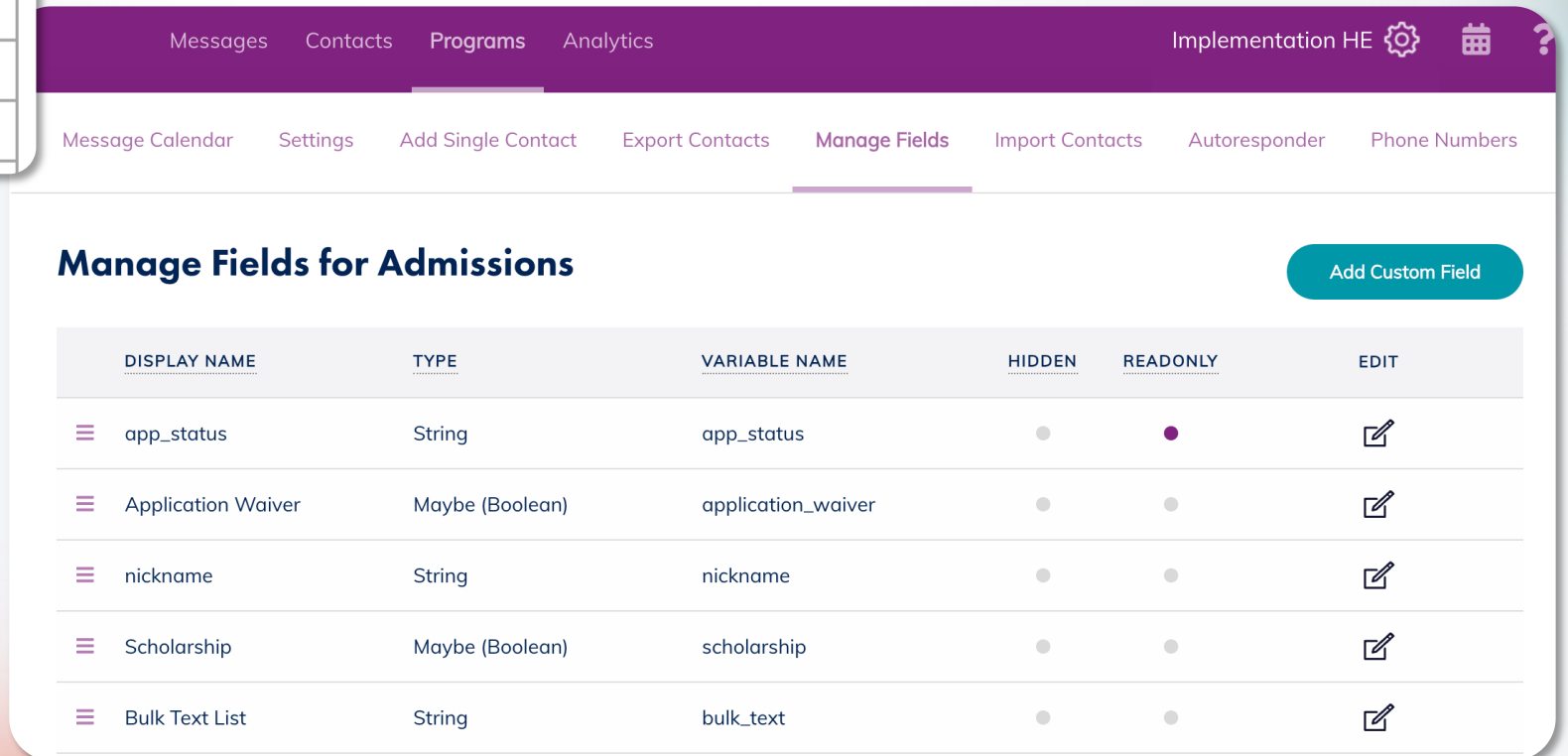
#	Date/Time	Condition	Content	Save Response
1	created_at + 1 day @ 2pm	app_submitted = TRUE  AND  app_status = Accepted	Hi [first_name]! This is the Signal Vine University Admissions team. We're going to be texting you about helpful resources and reminders!	Save intro_sent = TRUE



# Data Data Data!

current_area	prior_donor	major
Boston	TRUE	Communications
Boston	TRUE	Anthropology
Boston	FALSE	International Relations
Boston	FALSE	History
Philadelphia	FALSE	International Relations

Use Custom Fields for Segmenting!

DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
app_status	String	app_status	<input type="radio"/>	<input checked="" type="radio"/>	
Application Waiver	Maybe (Boolean)	application_waiver	<input type="radio"/>	<input type="radio"/>	
nickname	String	nickname	<input type="radio"/>	<input type="radio"/>	
Scholarship	Maybe (Boolean)	scholarship	<input type="radio"/>	<input type="radio"/>	
Bulk Text List	String	bulk_text	<input type="radio"/>	<input type="radio"/>	

Update Your Data File



# Automated Keyword Response Best Practices

# When to use automated keyword response

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Take a Poll

Collect Data

Encourage  
Engagement

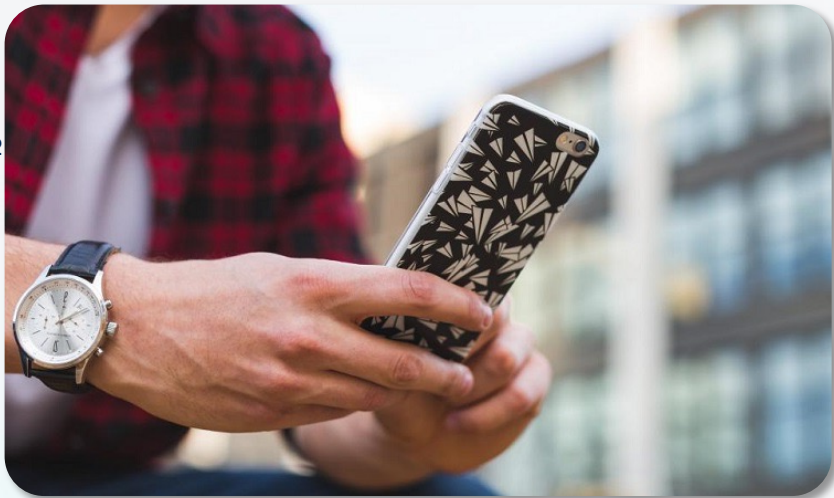
Illicit a  
Response

Target a  
Specific  
Segment

Up to you!!



# Call to Action



Respond Yes, No, or Maybe

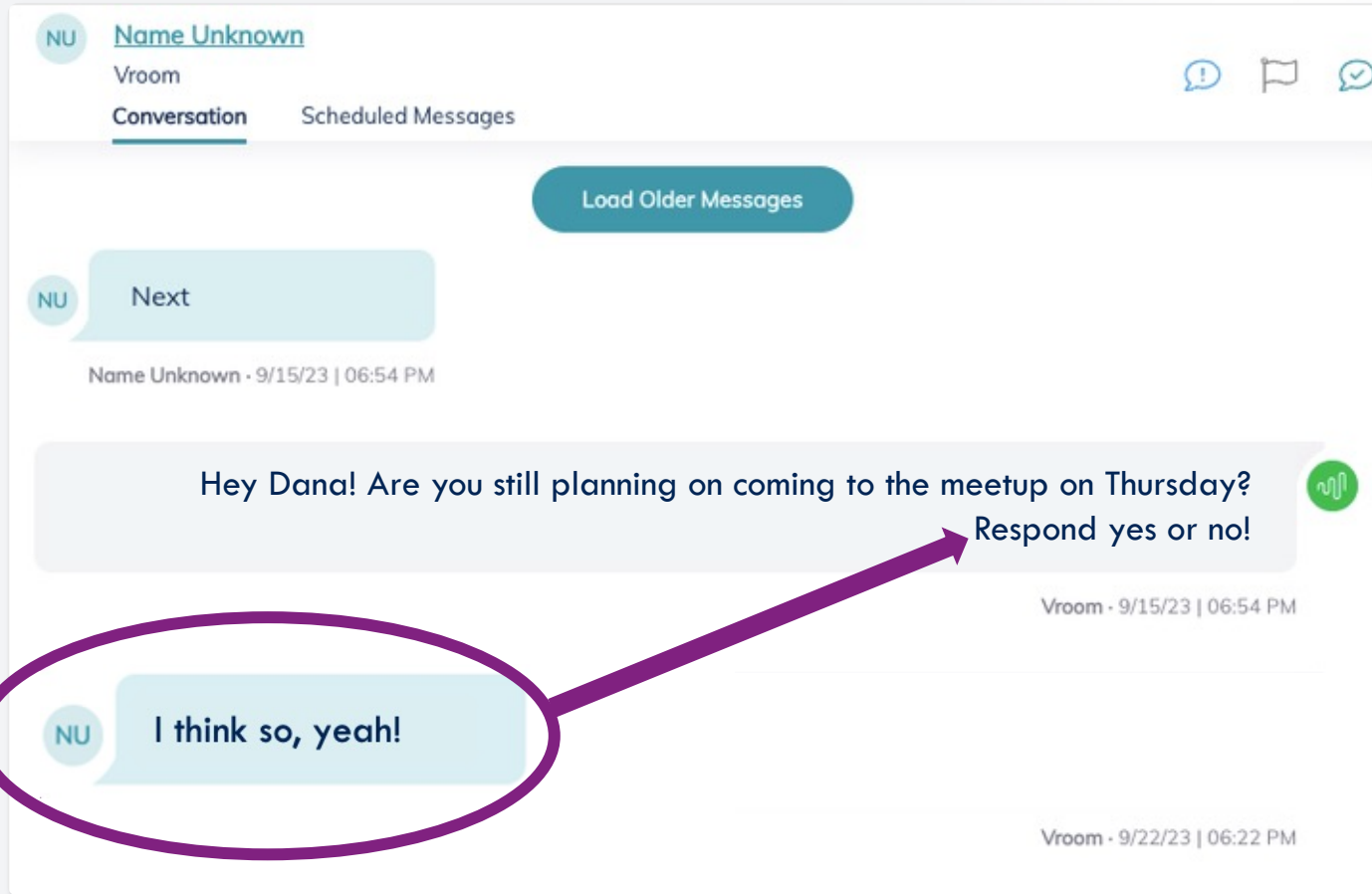
Text back 1...., 2... or 3...

Respond with (a)...., (b)... or (c)...

# Be Ready!

- Automated **KEYWORD** response
- Be prepared for a few unexpected responses
- First hour is key!





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NU Name Unknown  
Vroom

Conversation Scheduled Messages

Load Older Messages

NU Next  
Name Unknown · 9/15/23 | 06:54 PM

Hey Dana! Are you still planning on coming to the meetup on Thursday?  
Respond yes or no!

Vroom · 9/15/23 | 06:54 PM

NU I think so, yeah!

Vroom · 9/22/23 | 06:22 PM

Scroll for more

**Choose response:**

- Yes
- No
- Other response



NU Name Unknown  
Vroom

Conversation Scheduled Messages

Load Older Messages

NU Next

Name Unknown · 9/15/23 | 06:54 PM

Hey Dana! Are you still planning on coming to the meetup on Thursday?  
Respond yes or no!

Vroom · 9/15/23 | 06:54 PM

NU I think so, yeah!

Vroom · 9/22/23 | 06:22 PM

Scroll for more

**Choose response:**

- Yes
- No
- Other response

Send



# Examples

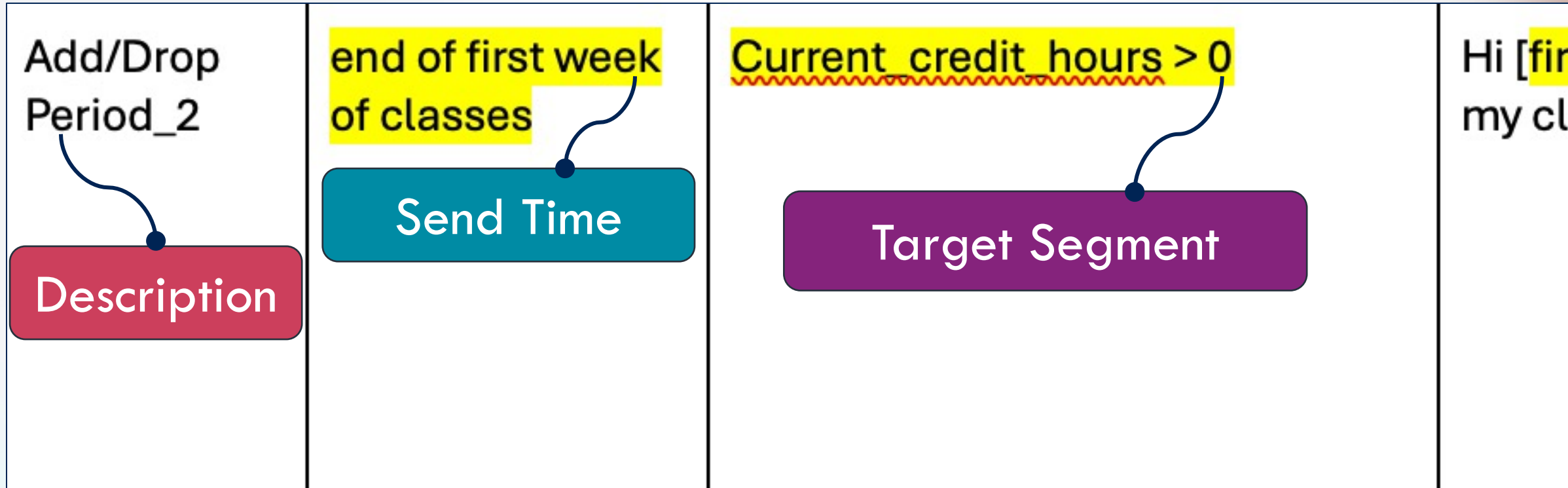


# Example 1

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<p>Add/Drop Period_2</p>	<p>end of first week of classes</p>	<p><u>Current_credit_hours &gt; 0</u></p>	<p>Hi [first_name] or [preferred_name], it's [advisor_name]. How is the week going? 1. Love my classes! 2. Gotta make some changes. 3. I need to talk through some major changes.  <b>Response to 1:</b> Fantastic! You have one more week to make changes!  <b>Response to 2:</b> Ok. Let's set up a time to talk today &lt;&lt;appointment link&gt;&gt; to make sure that you go into the weekend feeling good.  <b>Response to 3:</b> Definitely! Can you drop by my office today?</p>	
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# Example 1



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# Example 1

[data\_fields]

Call to Action

Hi [first\_name] or [preferred\_name], it's [advisor\_name]. How is the week going? 1. Love my classes! 2. Gotta make some changes. 3. I need to talk through some major changes.

**Response to 1:** Fantastic! You have one more week to make changes!

**Response to 2:** Ok. Let's set up a time to talk today <<appointment link>> to make sure that you go into the weekend feeling good.

**Response to 3:** Definitely! Can you drop by my office today?

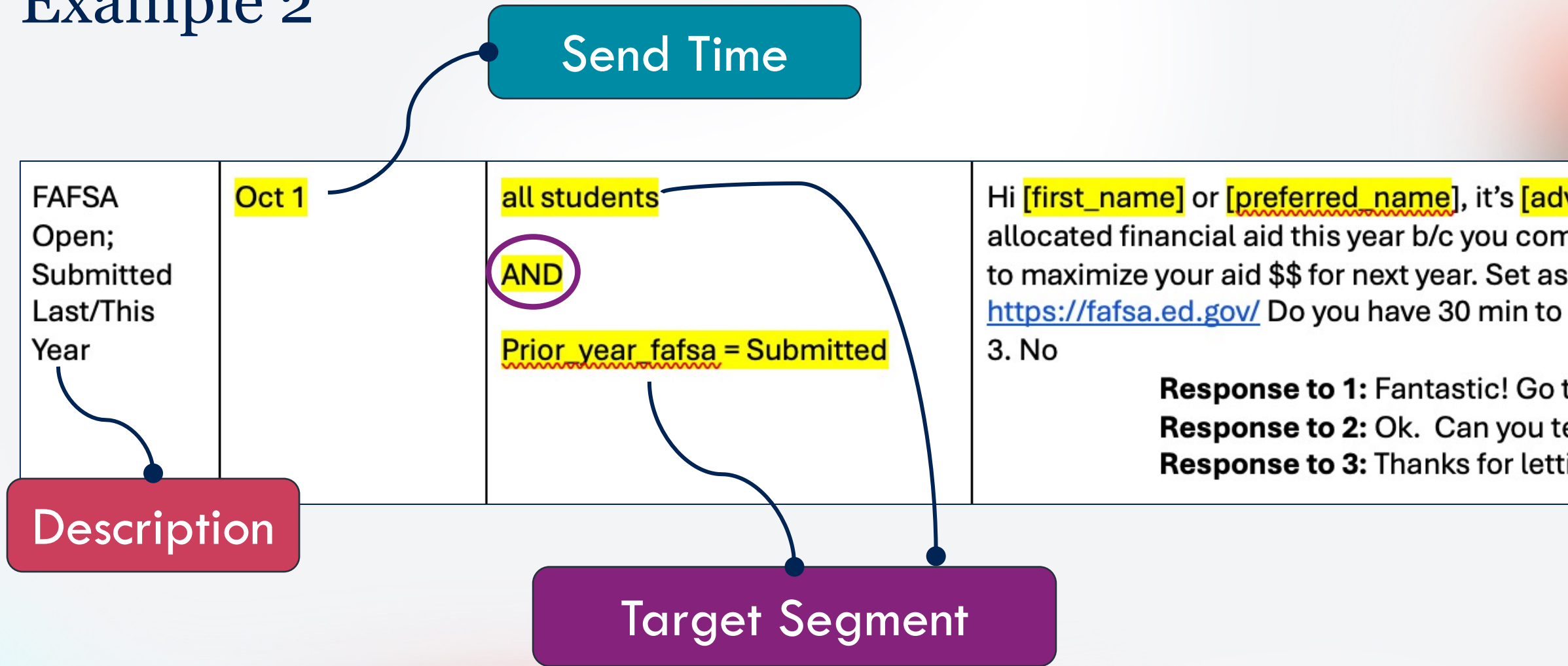
Custom Response

# Example 2

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<p>FAFSA Open; Submitted Last/This Year</p>	<p>Oct 1</p>	<p>all students  AND  <u>Prior_year_fafsa = Submitted</u></p>	<p>Hi <u>[first_name]</u> or <u>[preferred_name]</u>, it's <u>[advisor_name]</u>. Today the FAFSA opens. You were allocated financial aid this year b/c you completed the FAFSA last year. Complete it ASAP to maximize your aid \$\$ for next year. Set aside 30 mins this week to renew online: <a href="https://fafsa.ed.gov/">https://fafsa.ed.gov/</a> Do you have 30 min to complete it this month? 1.Yes! 2. Not sure yet. 3. No</p> <p><b>Response to 1:</b> Fantastic! Go to <a href="https://fafsa.ed.gov/">https://fafsa.ed.gov/</a>  <b>Response to 2:</b> Ok. Can you tell me more about that?  <b>Response to 3:</b> Thanks for letting me know. Out of curiosity, why not?</p>	<p>Save <b>1,2, or 3</b> <u>responses to fafsa</u></p>
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# Example 2



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## Example 2

[data\_fields]

Save New Data

Hi [first\_name] or [preferred\_name], it's [advisor\_name]. Today the FAFSA opens. You were allocated financial aid this year b/c you completed the FAFSA last year. Complete it ASAP to maximize your aid \$\$ for next year. Set aside 30 mins this week to renew online:

<https://fafsa.ed.gov/> Do you have 30 min to complete it this month? 1.Yes! 2. Not sure yet.  
3. No

**Response to 1:** Fantastic! Go to <https://fafsa.ed.gov/>

**Response to 2:** Ok. Can you tell me more about that?

**Response to 3:** Thanks for letting me know. Out of curiosity, why not?

Save **1,2, or 3**  
responses to fafsa

Custom Response

Call to Action



# Example 3

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<p>Still Not Registered</p>	<p>10 days prior to classes starting</p>	<p><u>Last_term</u> = Spring2021 AND <u>Current_credit_hours</u> = 0 AND Graduation=FALSE AND Holds = FALSE</p>	<p>Hi [first_name], it's [advisor_name]. I noticed you still are not yet registered for the Fall. There's still time! Are you planning on registering for this semester? 1. Yes 2. Still deciding 3. No</p> <p><b>Response to 1:</b> Great - there's still time! Do you need help getting registered? Response to yes: We can definitely help! Make an appointment here <a href="http://www.cu.edu/help">www.cu.edu/help</a> !</p> <p><b>Response to 2, still deciding:</b> Thanks for letting me know. Could you tell me a little bit more about what you are thinking?</p> <p><b>Response to 3:</b> Thanks for letting me know. Out of curiosity, why not? A) <u>Transferring</u> B) Financial difficulties C) Need a break D) Other</p> <p><b>Response to A:</b> Thanks for letting me know. Where are you attending?</p> <p><b>Response to any response:</b> Good luck! We wish you the best! Make sure to get your transcript at &lt;&lt;link&gt;&gt;</p> <p><b>Response to B:</b> We are here to help with finances! Contact financial aid directly at <a href="mailto:financialaid@university.edu">financialaid@university.edu</a> or via their hours of operation support line, <a href="tel:###.###.####">###.###.####</a></p> <p><b>Response to C:</b> Thanks for letting me know. Just a reminder that you have access to these resources on campus! Hang in there and let me know when you are ready to get re-started!</p> <p><b>Response to D:</b> Thank you for your response.</p>	<p>Save responses A/B/C/D to not_registering_term</p>
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# Example 3

2021

Hi [first\_name], it's [advisor\_name]. I noticed you still are not yet registered for the Fall. There's still time! Are you planning on registering for this semester? 1. Yes 2. Still deciding 3. No

**Response to 1:** Great - there's still time! Do you need help getting registered?

Response to yes: We can definitely help! Make an appointment here [www.cu.edu/help](http://www.cu.edu/help) !

**Response to 2, still deciding:** Thanks for letting me know. Could you tell me a little bit more about what you are thinking?

**Response to 3:** Thanks for letting me know. Out of curiosity, why not? A) Transferring B) Financial difficulties C) Need a break D) Other

**Response to A:** Thanks for letting me know. Where are you attending?

**Response to any response:** Good luck! We wish you the best! Make sure to get your transcript at <<link>>

**Response to B:** We are here to help with finances! Contact financial aid directly at [financialaid@university.edu](mailto:financialaid@university.edu) or via their hours of operation support line, [###.###.####](tel:###.###.####)

**Response to C:** Thanks for letting me know. Just a reminder that you have access to these resources on campus! Hang in there and let me know when you are ready to get re-started!

**Response to D:** Thank you for your response.

Save responses A/B/C/D to not\_registering\_term

Save to a custom data field.

urs = 0

SE

# Save Response

What is your goal for this automated  
key word response message?

Use this data to  
text a new segment

Download  
the data

Gather  
qualitative data

Increase  
engagement

Save to a new field!



Don't save!



# Save Responses

- Plan the questions and response options for your text
- Create the custom field type
- Use the new data point for future messages
- Download the data to use elsewhere!

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<p>[adviser_name], it's [adviser_name]. I noticed you still are not yet registered for the Fall. It's still time! Are you planning on registering for this semester? 1. Yes 2. Still deciding</p> <p><b>Response to 1:</b> Great - there's still time! Do you need help getting registered?          Response to yes: We can definitely help! Make an appointment here <a href="http://www.cu.edu/help">www.cu.edu/help</a>!</p> <p><b>Response to 2, still deciding:</b> Thanks for letting me know. Could you tell me a little bit more about what you are thinking?</p> <p><b>Response to 3:</b> Thanks for letting me know. Out of curiosity, why not? A) Transferring B) Financial difficulties C) Need a break D) Other</p> <p><b>Response to A:</b> Thanks for letting me know. Where are you attending?</p> <p><b>Response to any response:</b> Good luck! We wish you the best! Make sure to get your transcript at &lt;&lt;link&gt;&gt;</p> <p><b>Response to B:</b> We are here to help with finances! Contact financial aid directly at <a href="mailto:financialaid@university.edu">financialaid@university.edu</a> or via their hours of operation support line, ###.###.####</p> <p><b>Response to C:</b> Thanks for letting me know. Just a reminder that you have access to these resources on campus! Hang in there and let me know when you are ready to get re-started!</p> <p><b>Response to D:</b> Thank you for your response.</p>	<p>Save responses A/B/C/D to not_registering_term</p>
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# Synonyms

- You can set up custom synonyms!
  - Must be verbatim
  - Special characters and punctuation
- No synonyms, best to use a string field

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Synonyms	
yes	yes, <u>yes</u> , y, yes., yeah, yep, <u>ya</u> , yea, yes!, yea!, yup, <u>yas</u> , 👍, 👍, 👍, 👍, 👍, 👍
no	no, <u>no</u> , no., n, nope, nah, no!, nope!, 🙅, 🙅, 🙅, 🙅, 🙅, 🙅
help	help, <u>hlp</u> , help.

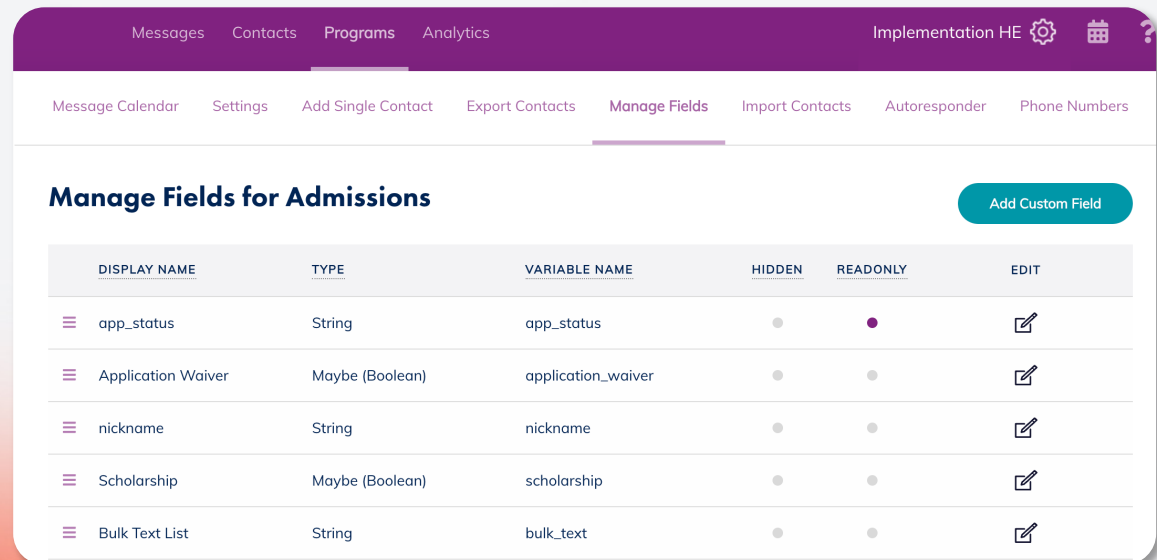


# Custom Field Best Practices

- Be mindful of how many NEW custom fields you are creating!
- You can't delete fields, and each one will make your data file bigger.
- Do you need to use this field more than once?
  - Work with support for the best plan if you want to use a field repeatedly!

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	current_area	prior_donor	major
]	Boston	TRUE	Communications
]	Boston	TRUE	Anthropology
]	Boston	FALSE	International Relations
]	Boston	FALSE	History
]	Philadelphia	FALSE	International Relations



# Customize the save!

- **Standardize**
  - Save 1 as “joining the military”
  - Save 2 as “college”
  - Save 3 as “workforce”
  - Save 4 as “undecided”
  - Save 5 as “other”
- **Boolean Fields**
  - Save yes as TRUE
  - Save no as FALSE

## What are the field types I can use?

TYPE	DEFINITION	EXAMPLE
String	Open text	Hi there!
Boolean	Displayed as a checkbox ...	true/false
Numeric	A numeric value with no d...	123
Float	A numeric value with deci...	123.0
List	A countable number of or...	item1;item2;item3

# Pop Quiz!

Answer on the Zoom poll  
or rest your eyes for a  
minute if you have quizzes

# Demo

# Planning our text!

- I want to find out my high school caseload's plans for post-graduation.
- I only want it to go to 12<sup>th</sup> grade
- I want to give 4 options
  - Def college
  - Def work
  - Maybe college
  - Not really sure
- I want to save their responses

Post grad plans	9/8/24 @3pm	Hs_grade = 12	<p>Hi [first_name] or [preferred_name]! It's [success coach name]! This may feel like a long way ahead, but it will be here in a minute. What are you thinking for post-graduation plans? 1 definitely college 2 definitely work 3 I have no idea</p> <p>Response to 1: Fantastic! Now's the time to get your planning done b/c most colleges have strict deadlines.  Response to 2: Great! Do you know what type of work?  Response to 3: Ok! We have a lot of programming coming up to help you decide. <a href="http://www.success.com/plan">www.success.com/plan</a>  [picture] Remember, everyone has their own path!</p>	Save 1/2/3 to post_grad_plans
College_bound	10/2/24 @3pm	post_grad_plans = 1, 3	<p>Hi [first_name] or [preferred_name]! October is College Application month! The goal is to have everyone apply for college to hit deadlines and access the most dollars to reduce the cost of a degree. Have you already applied to a school? Yes or No</p> <p>Response to yes: Wow! I'm impressed!  Response to no: You are right on track! Check out our events this month. <a href="http://www.success.com/events">www.success.com/events</a></p>	



What do you feel empowered  
to do after this webinar?

# Q&A

Please put your questions in the Q&A box.  
I'll get to as many as possible and follow up via  
email if more research is needed!

# Thank You

See you next month!