Introduce yourself in the chat! Which institution are you representing?

Message 101 for Counselors

Get to know the platform structure and start texting today!

Kelsey Seale

modern campus®

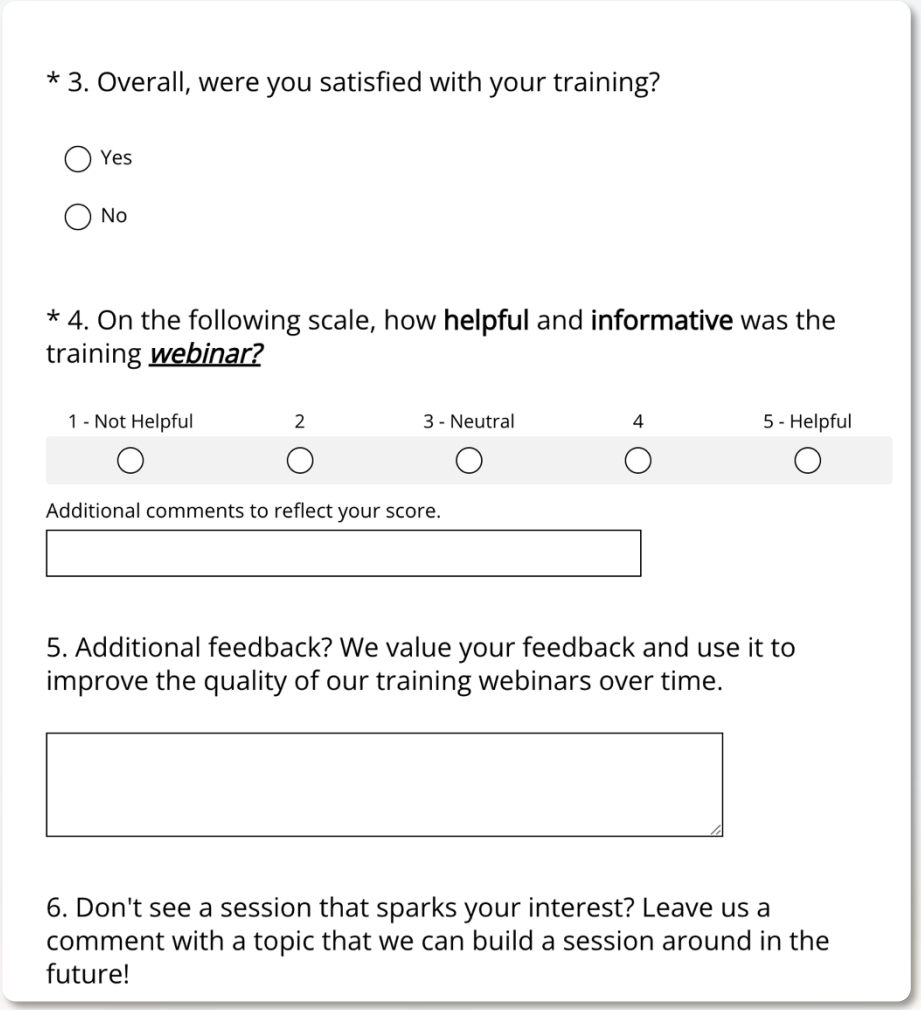
Message 101 for Counselors

Your data opens up the platform to create customized segments!

Kelsey Seale

Post-Webinar Survey

- 2 minutes!
- We love knowing what you like or would like improved!
- Really helps me (Kelsey) out when presenting to my boss ☺
- I'll provide a link at the end or you will get an email tomorrow!!!



* 3. Overall, were you satisfied with your training?

◯ Yes

◯ No

* 4. On the following scale, how **helpful** and **informative** was the training ***webinar?***

1 - Not Helpful	2	3 - Neutral	4	5 - Helpful
◯	◯	◯	◯	◯

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

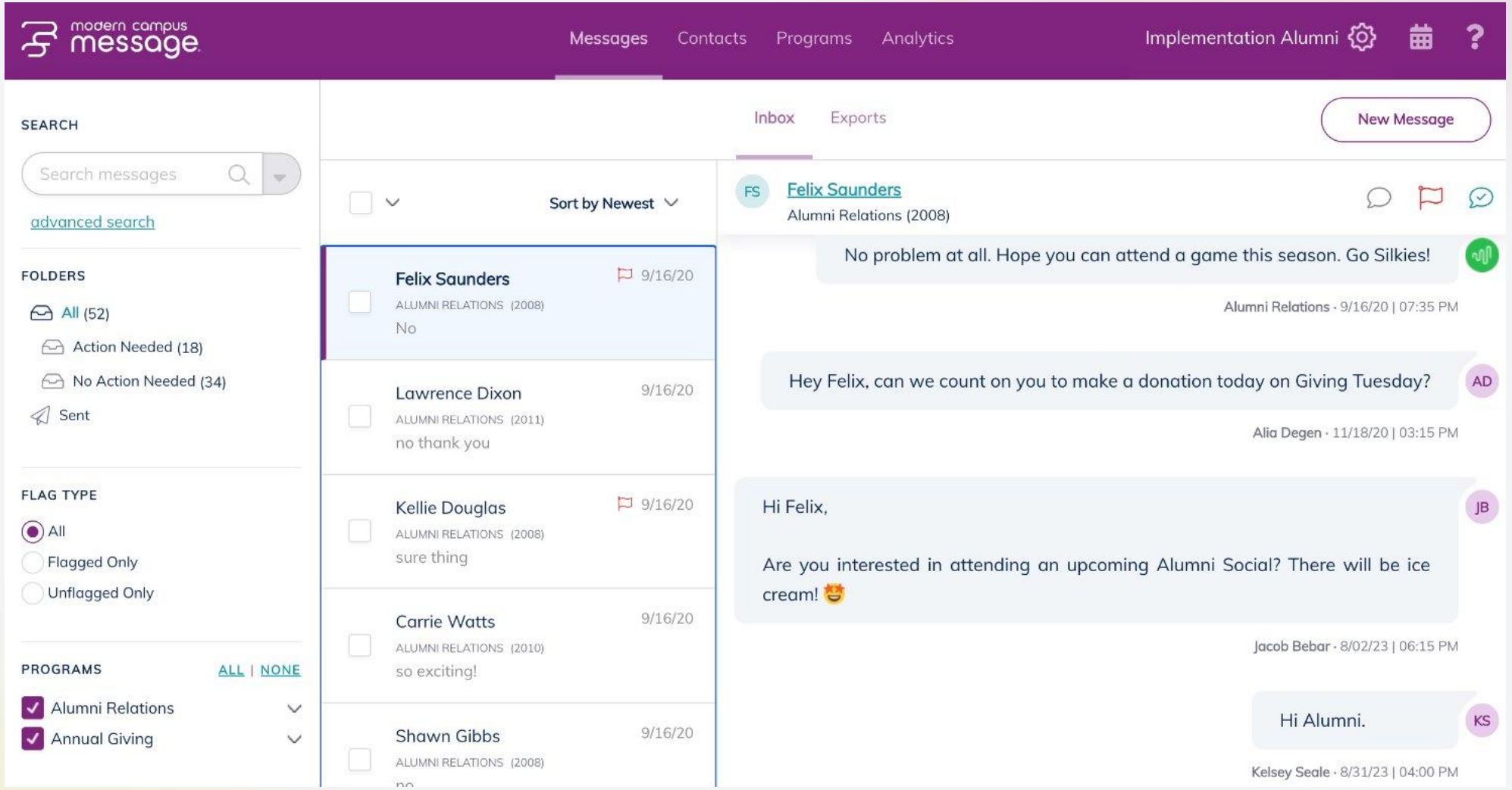
6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

Agenda

1. Intro to Message
2. Platform Tour
3. Personal Settings
4. Messaging
5. Programs Tab
6. Knowledge Base & Support
7. Q&A

What is Message?

Modern Campus Message



Communication is Key

- More than one way to Message!
  - One to one messages
  - Sending out group blasts
  - Automated message campaigns
- Blending Model
  - All of these can be used at once
  - To your contact, it's one continuous conversation!

Blending Messaging in Practice

Scheduled Automated Message:
to unregistered students

Hi [FIRST NAME], it's [ADVISOR]. Do you need help registering for spring classes?

Hi [NAME], just wanted to check in again. Did you need help registering for spring classes?

Automated Nudge:
sent to unresponsive students

Nope.

Great! Let us know if you think of any questions.

Automated Response:
to unregistered students

Actually, what is the deadline to register for classes?

Virtual Advisor:
automated reply for FAQs

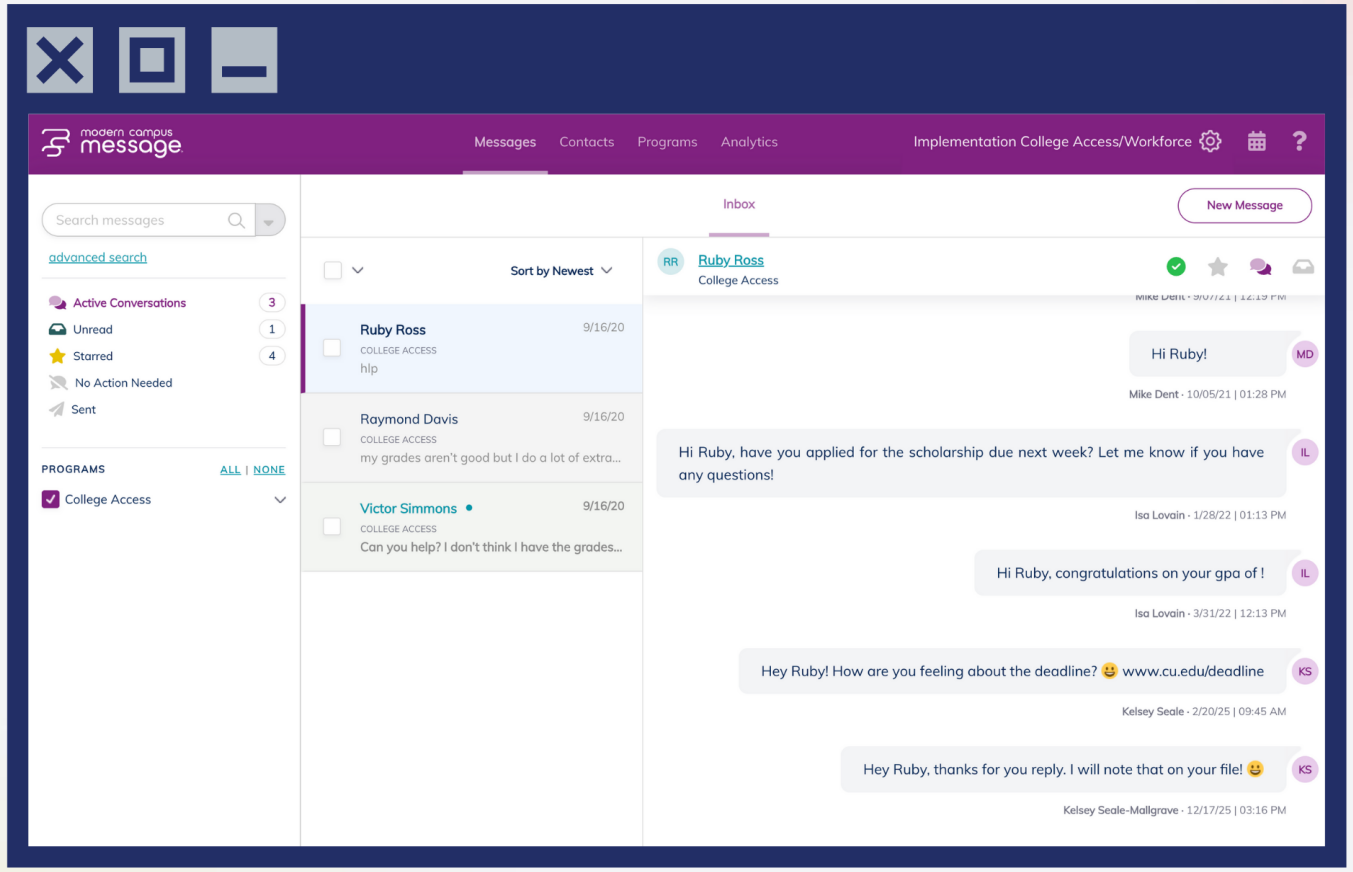
The deadline to register for spring classes is January 10.

Event Triggered Messaging

Virtual Advisor

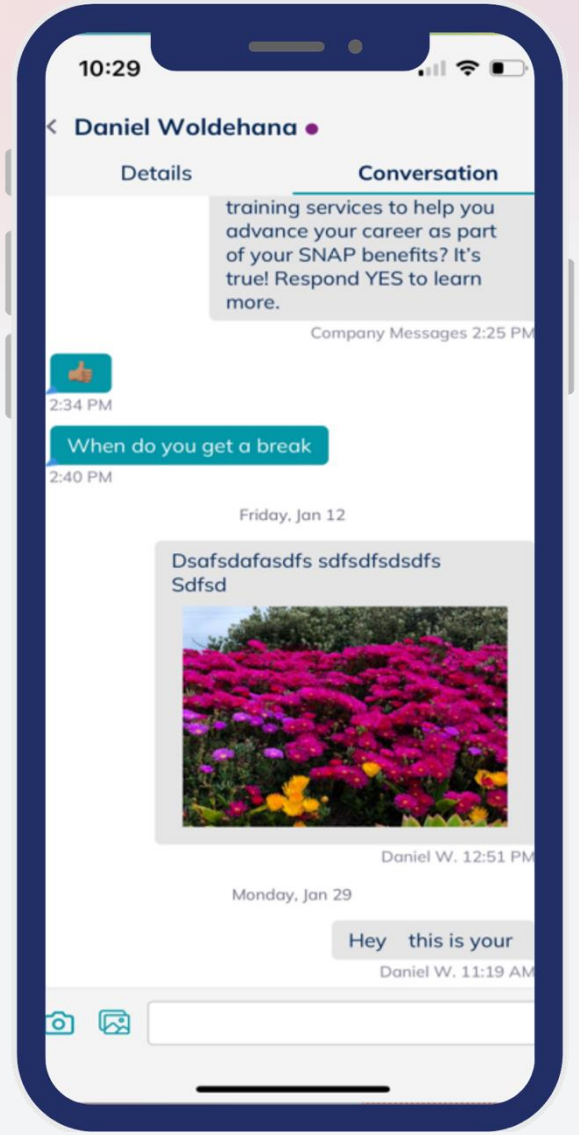
Web App

Either https://app.signalvine.com/ or your custom url



Mobile App

Search "Modern Campus Message"



Your Role in Message

Account Admin

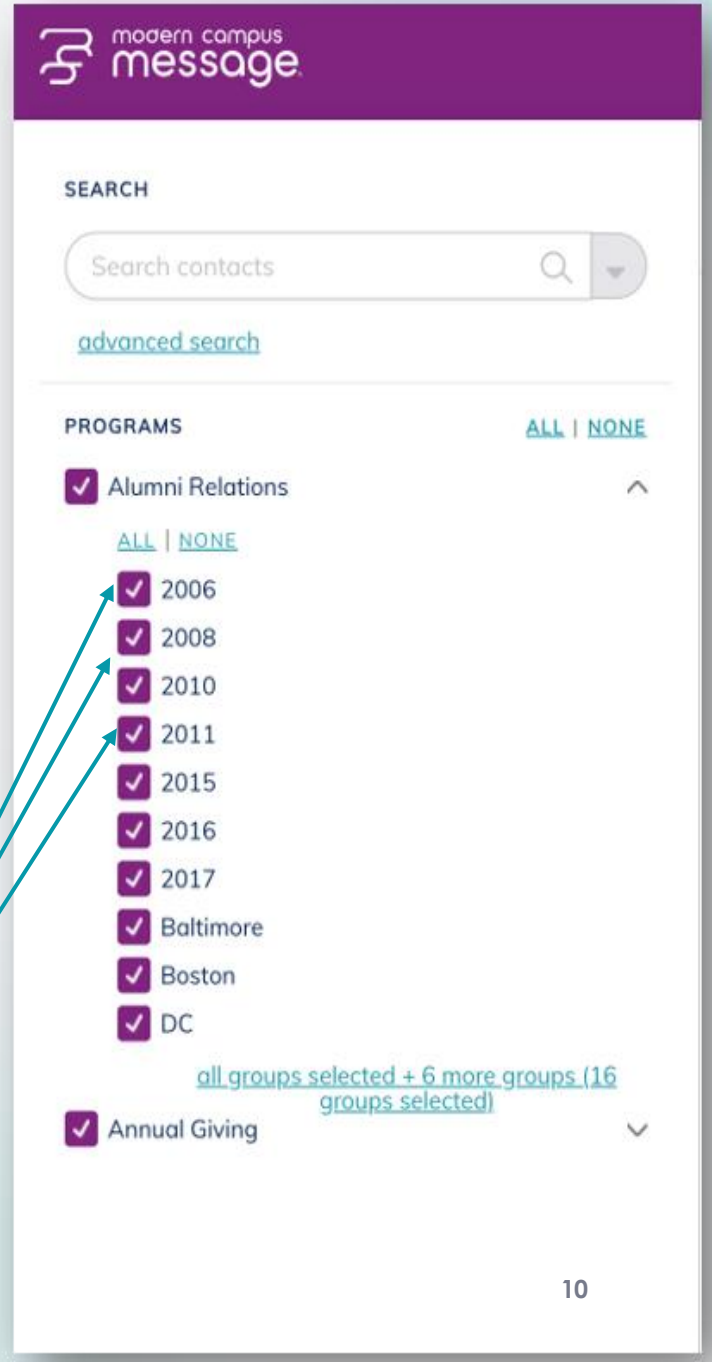
- All student access
- Invite users
- Update settings
- Import data

Program Admin

- All assigned program access
- Invite users to their program
- Update settings of their program
- Import data to their program

Counselor

- Access to the students on YOUR caseload



Counselors CAN	Counselors CANNOT
View and message YOUR caseload	View and message all program contacts
Update personal settings	Update program-wide settings
Send messages to custom segments of your contact group	Upload contacts in bulk
Send links, emojis	
Export Contacts into a spreadsheet	
View analytics	
Send individual and group messages	
View personal message calendar	

Program By Program Basis

Send images

Update contact data

Add a single contact

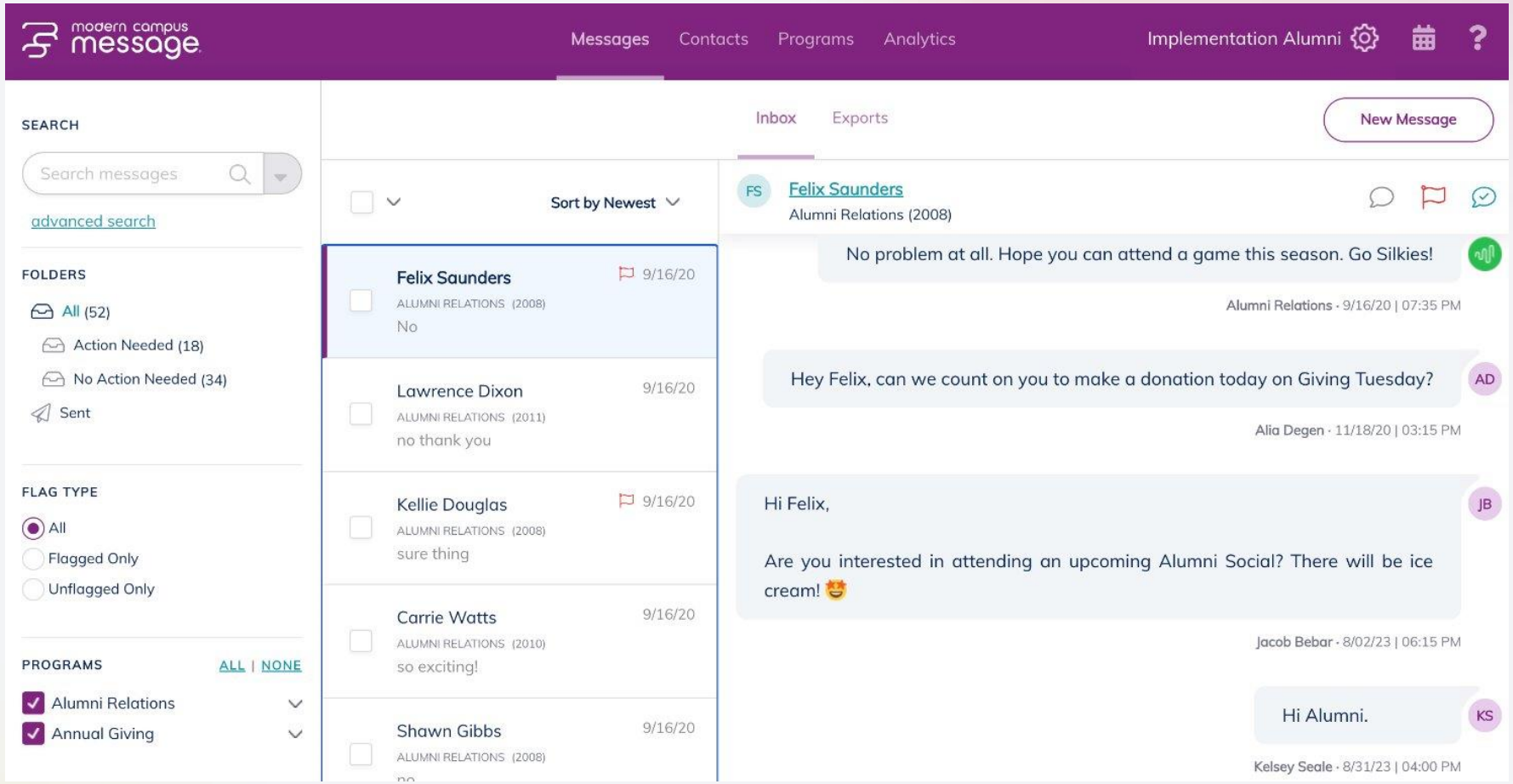
Delect program messages

Activate contacts

Platform Tour

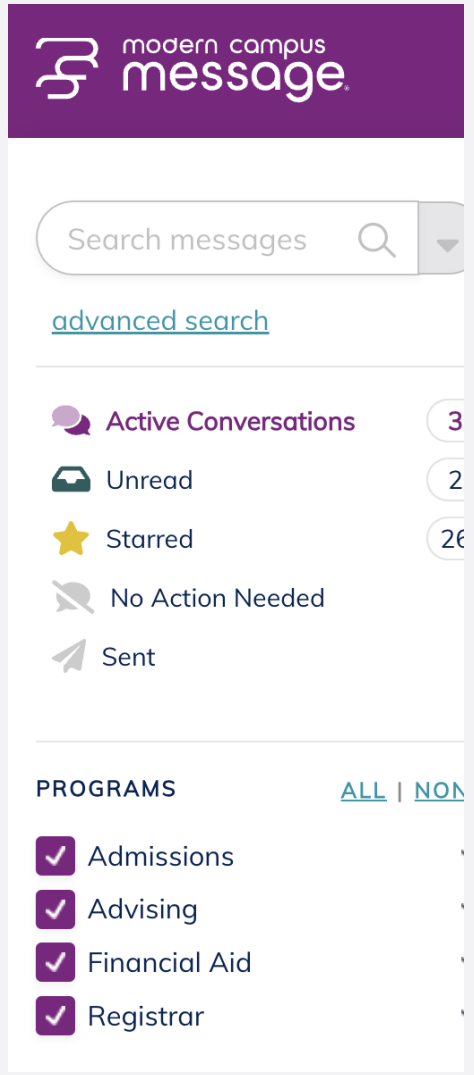
Quick look at messages, contacts, programs, and analytics

Platform Tour



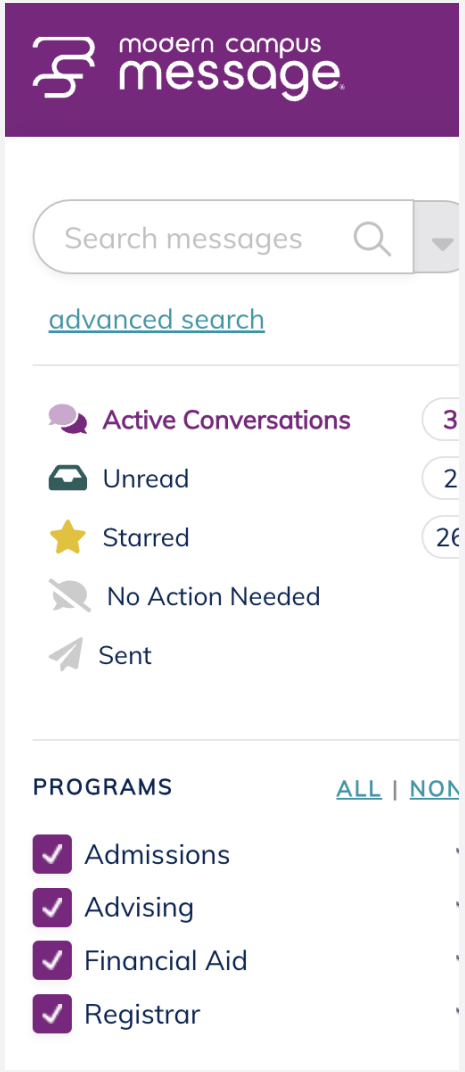
Message Type Filters

- **Active Conversations**: There's been no automated response.
- **Unread**: Active and not yet read.
- **Starred**: Star a conversation to draw further attention.
- **No Action Needed**: Automation has responded on your behalf.
- **Sent**: All previously sent messages.

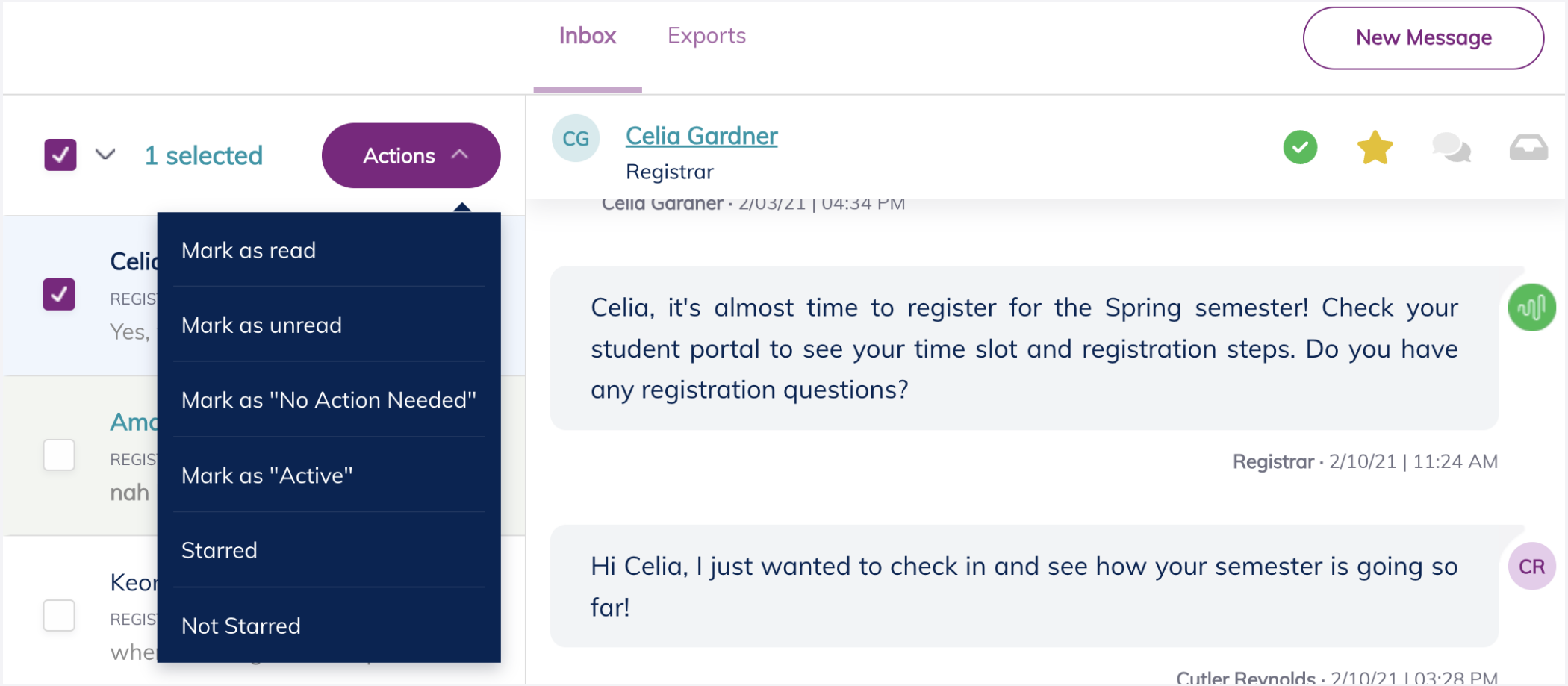


Inbox management

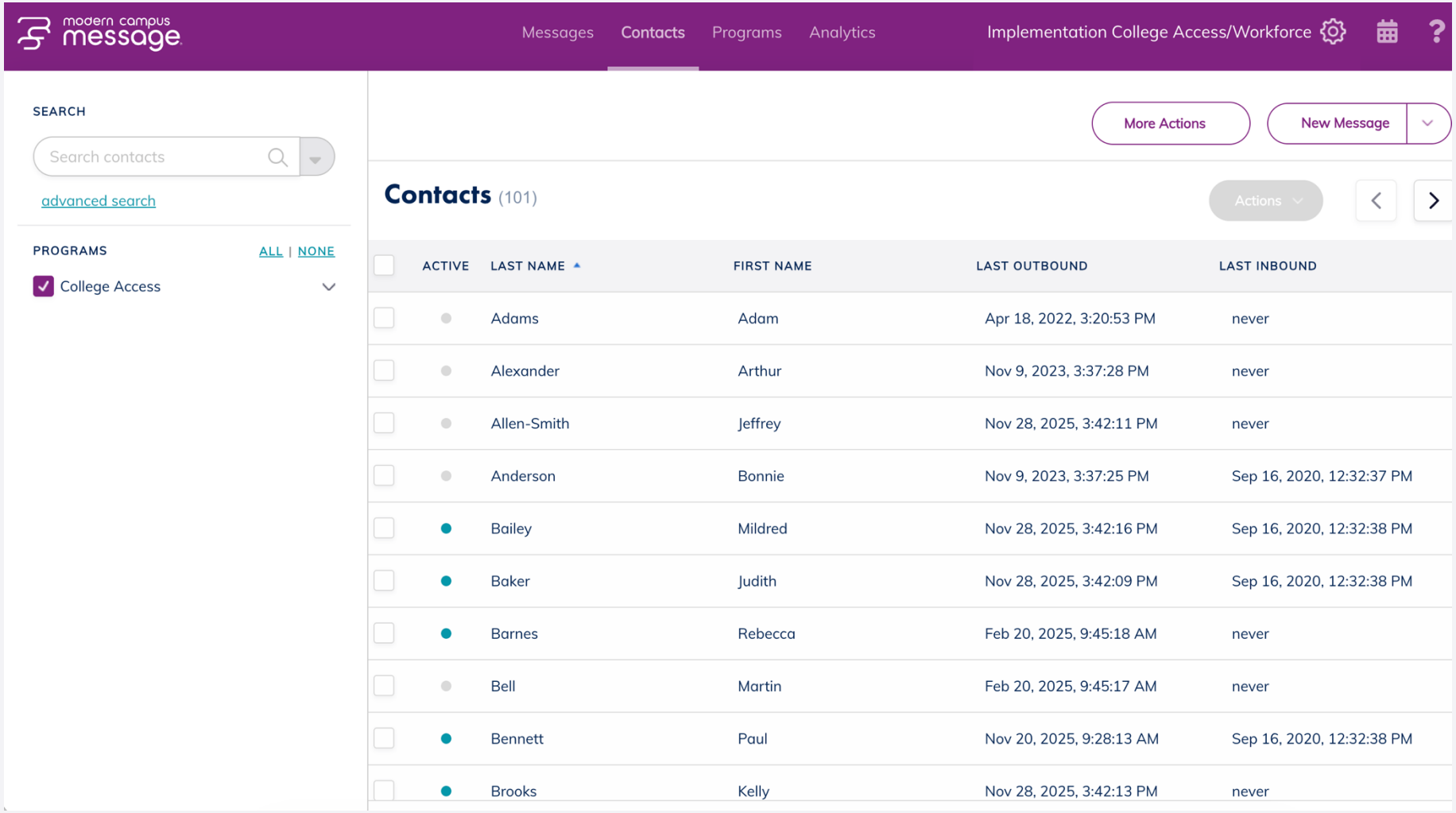
- Focus on **Active Conversations**
  - Messages that (likely) require your attention
- Be proactive with your inbox management!



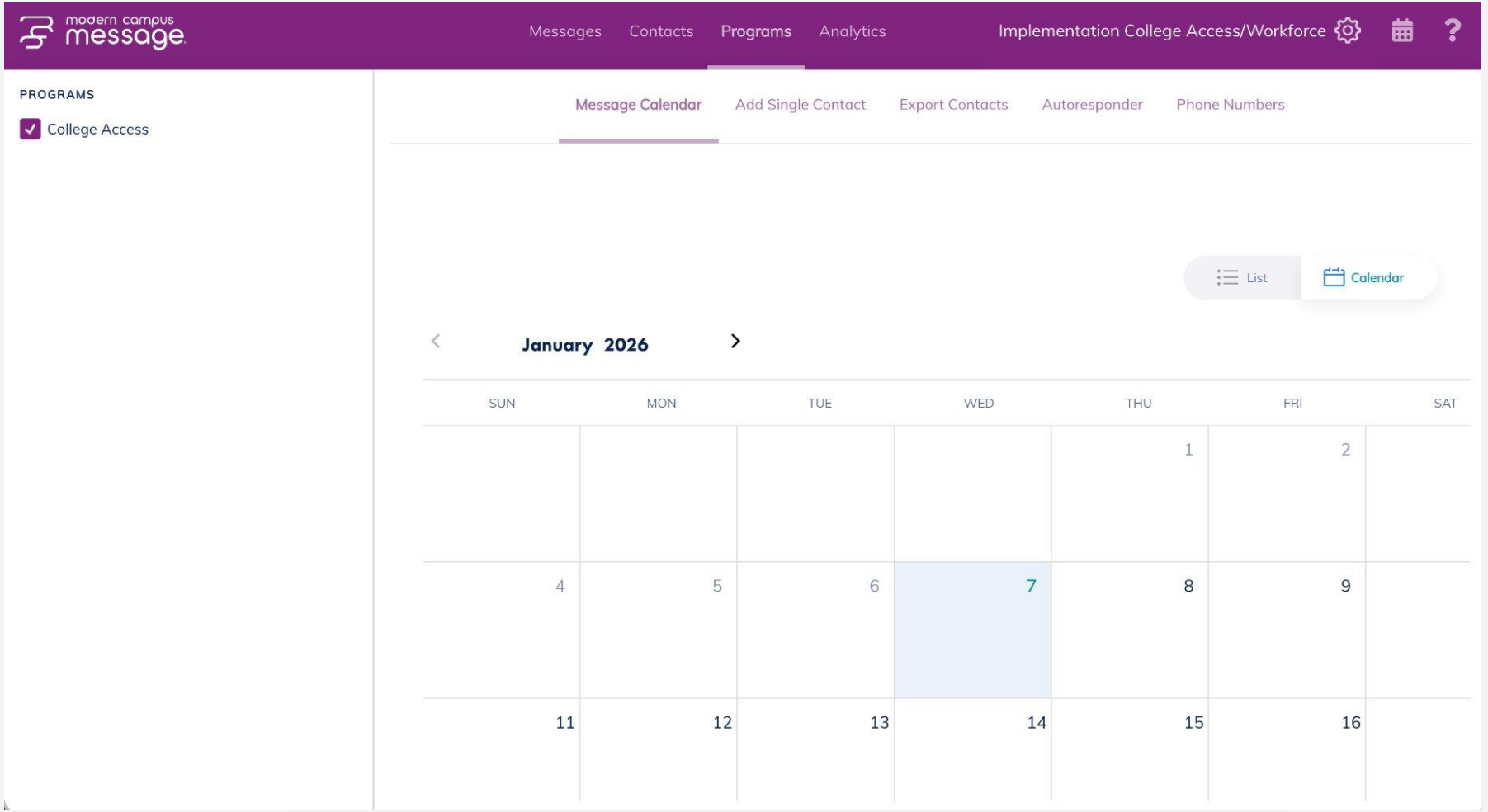
Message Actions / Organization



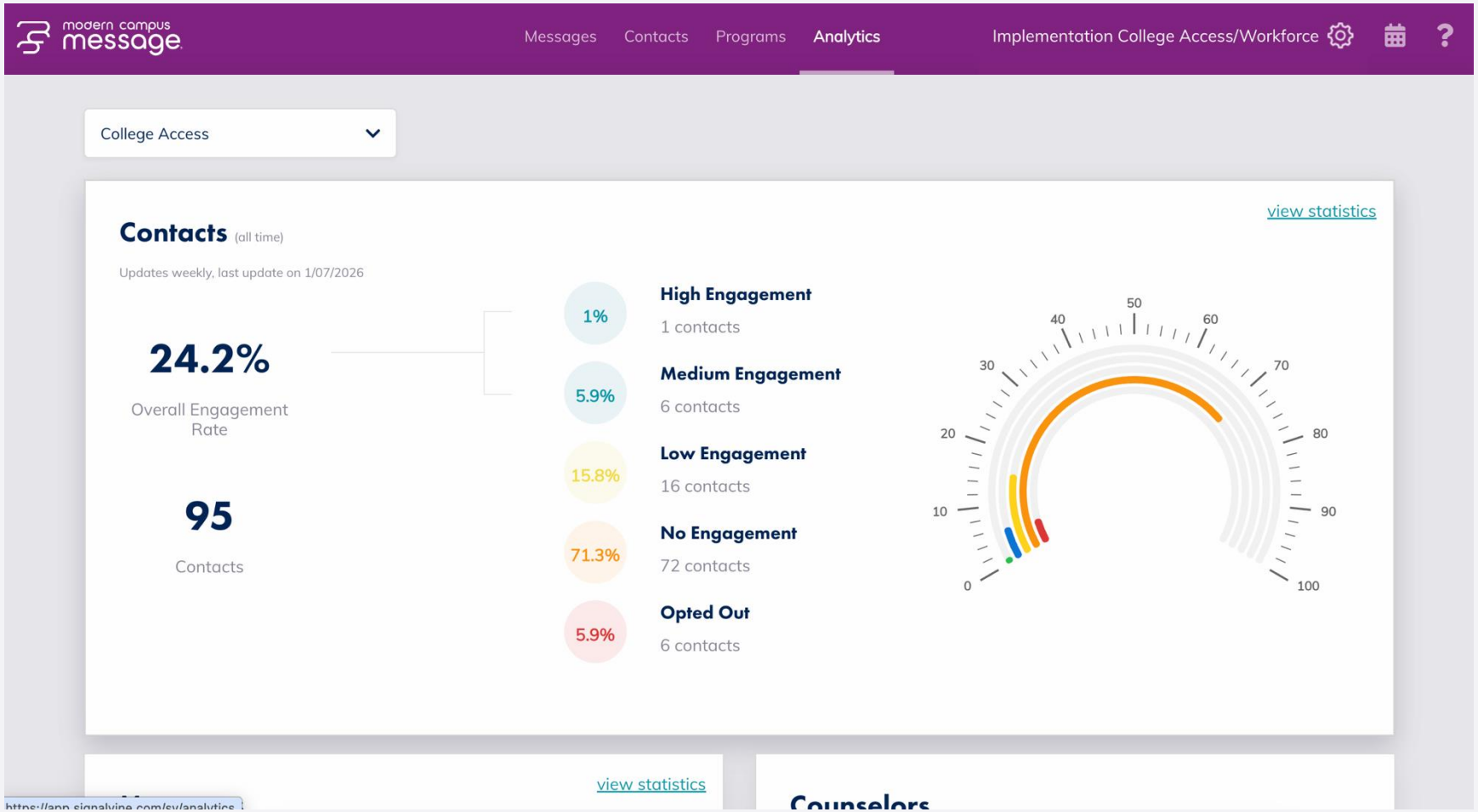
Contacts Tab



Programs Tab



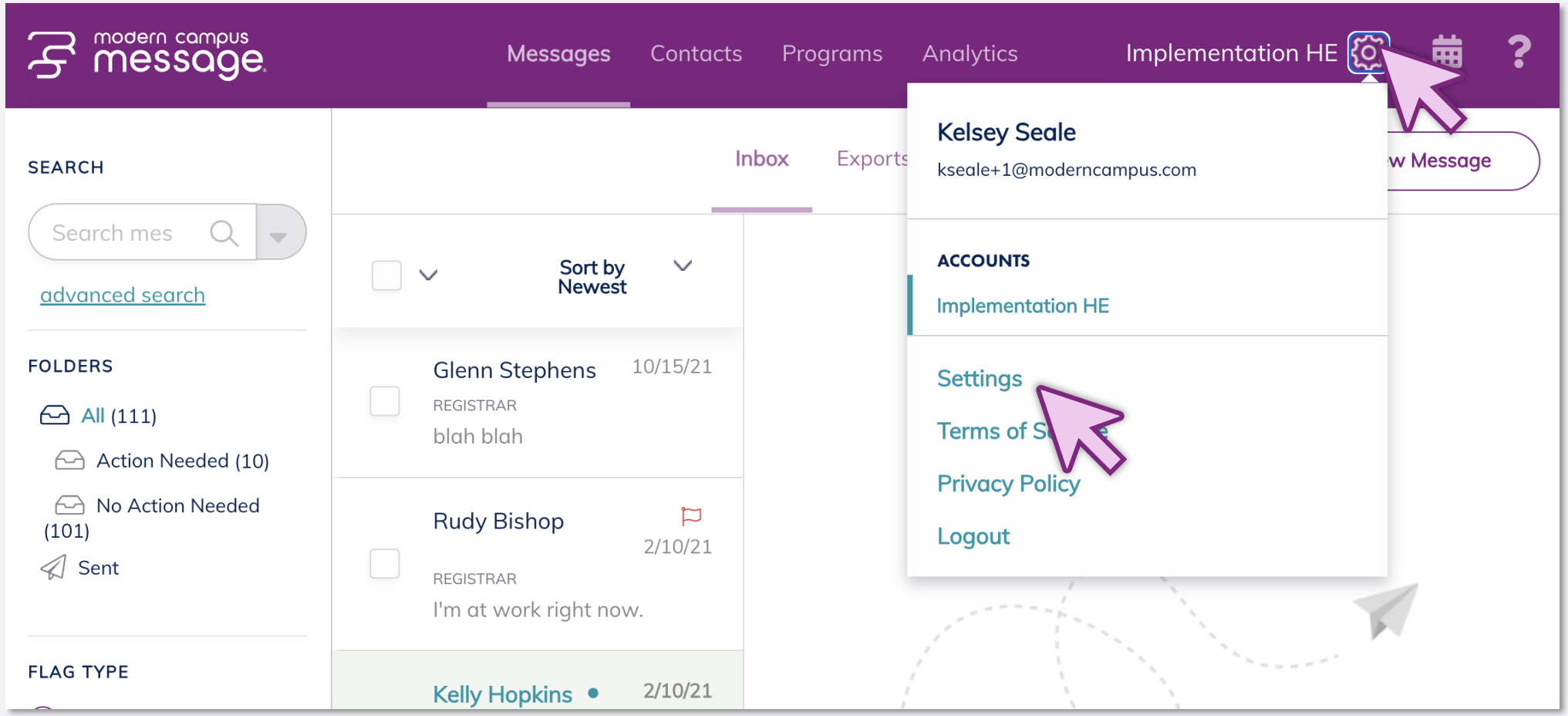
Analytics Tab



Personal Settings

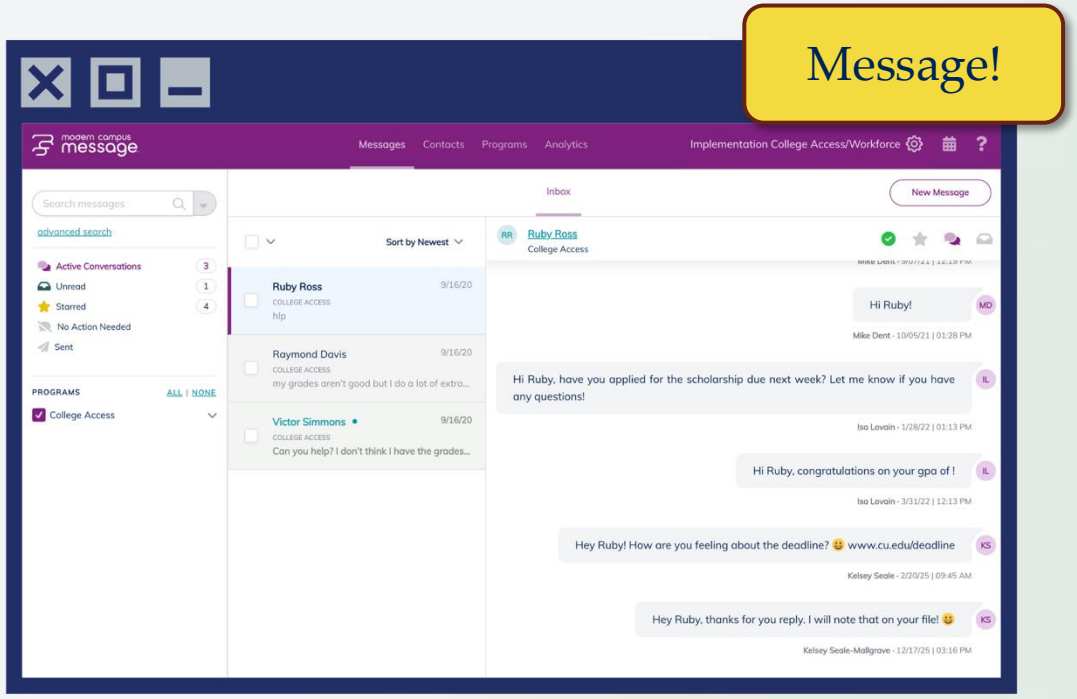
Inbox preferences and notification settings

Locate Your Personal Settings



Personal Settings Highlight

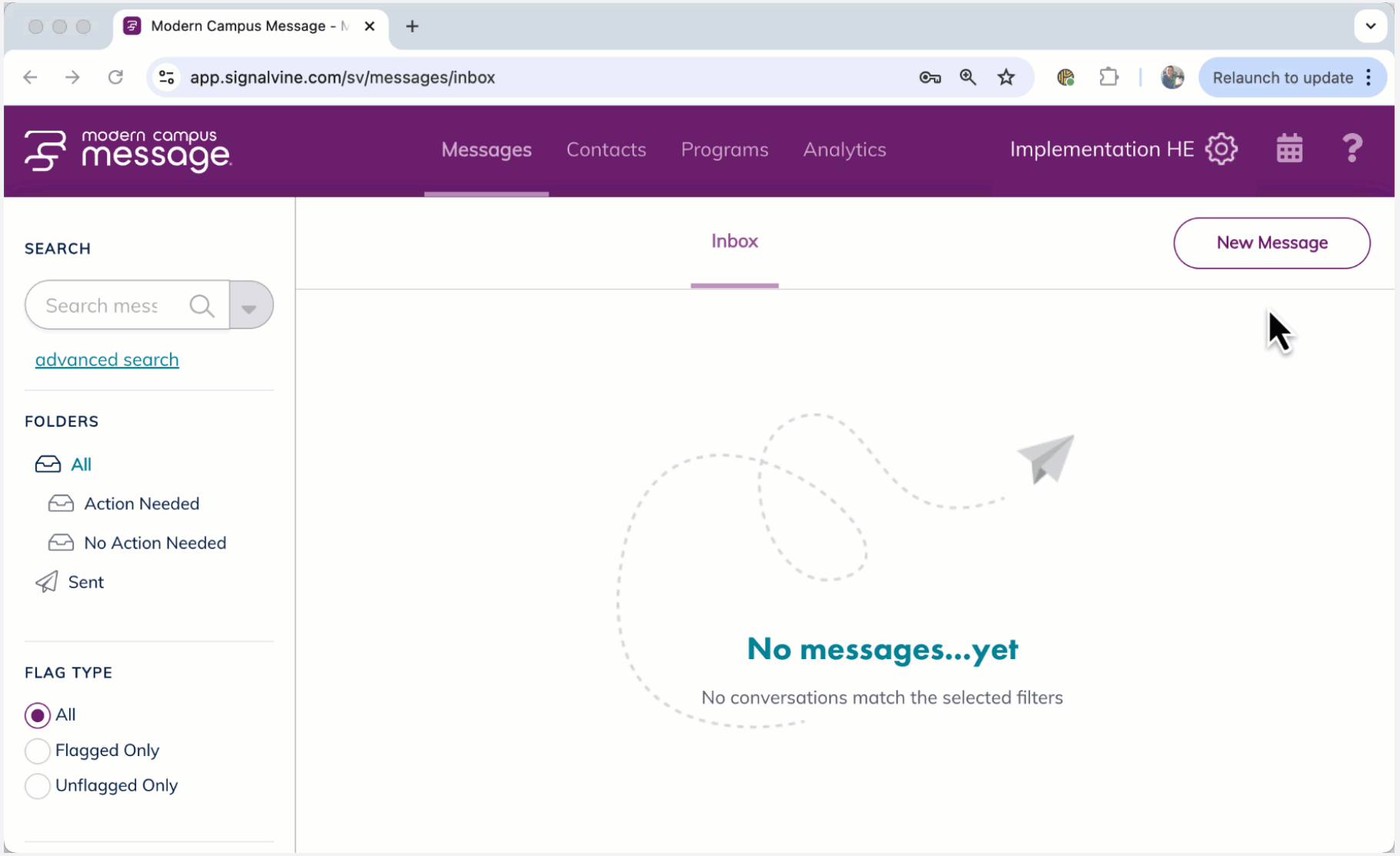
- Enable Desktop Notifications
  - Increase message response rate
  - Stay on top of messages while working in other windows.
- Automatically mark conversations as "No Action Needed" when I respond.
  - Keeps inbox clear
  - Simplifies work flow



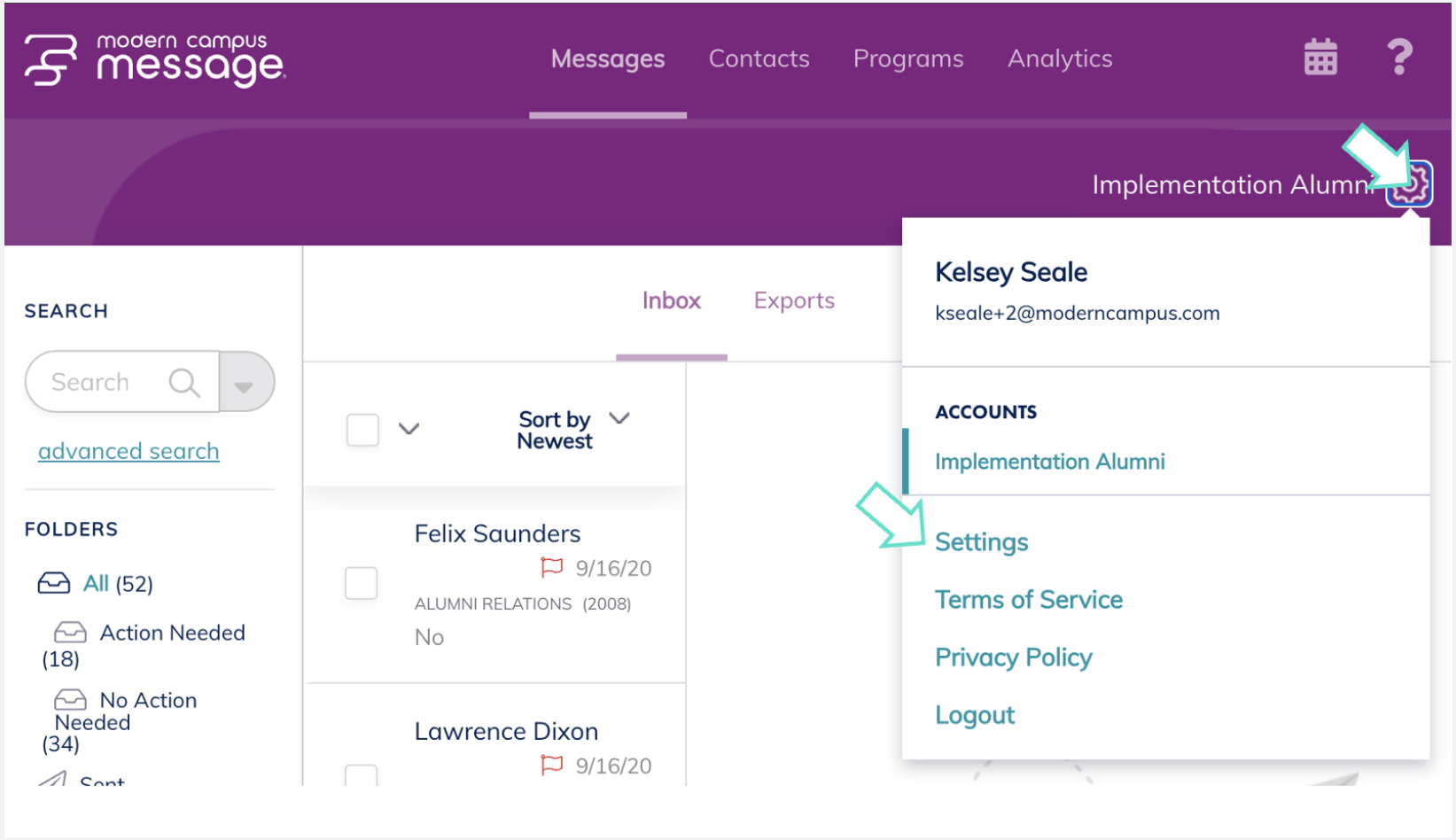
Notification Options

1. **Desktop**
    1. Real time notification of each new text received through Message
    2. Pop-up visible regardless of the tab you are currently using
    3. **Recommended form of notification for quick response**
2. **Email / Text Message**:
    1. Once a day summary of ALL texts, new and historical, received through Message
    2. Choose the notification time and change your preference at any time

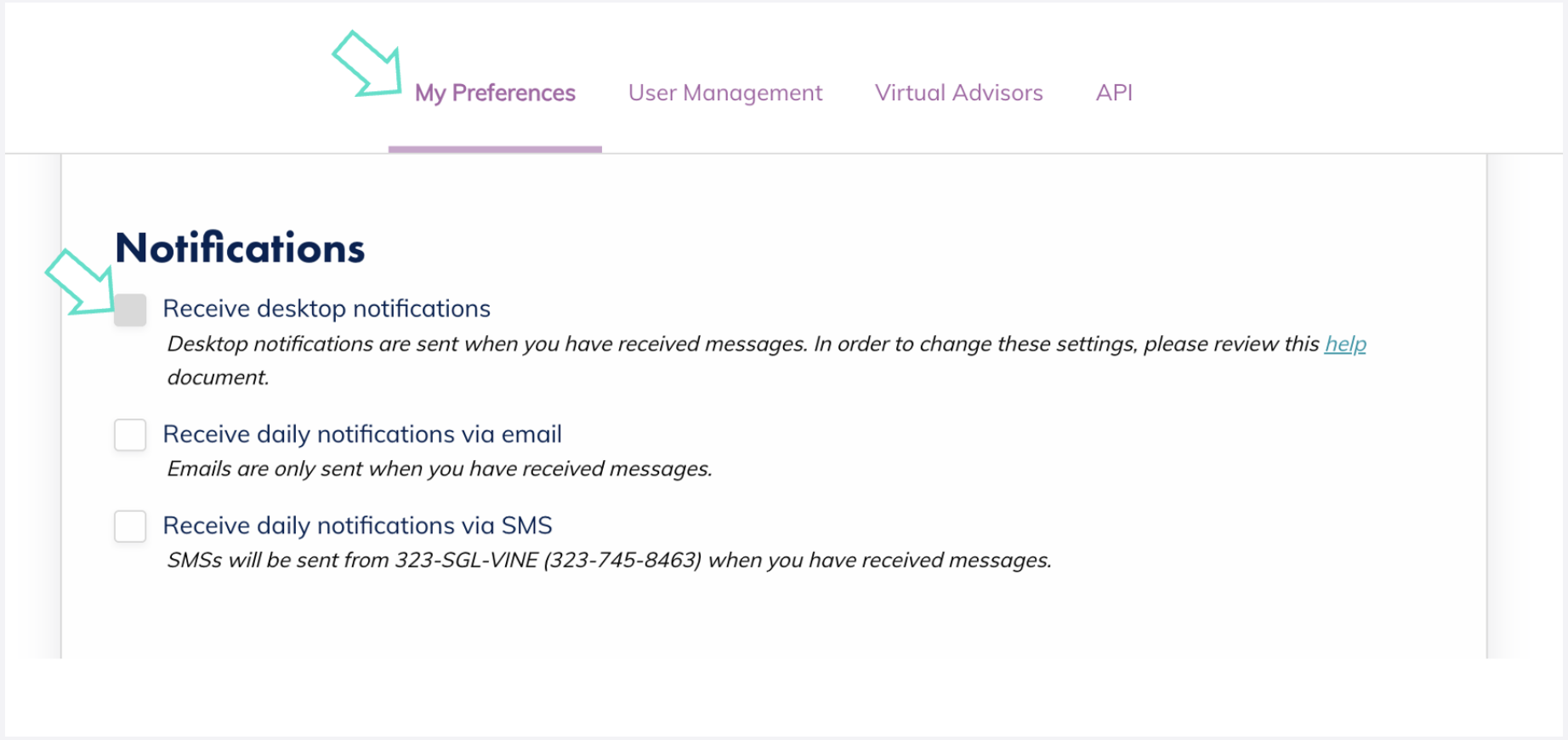
Enable Desktop Notifications



1. Click the gear icon at the top right of your screen and choose **Settings**.

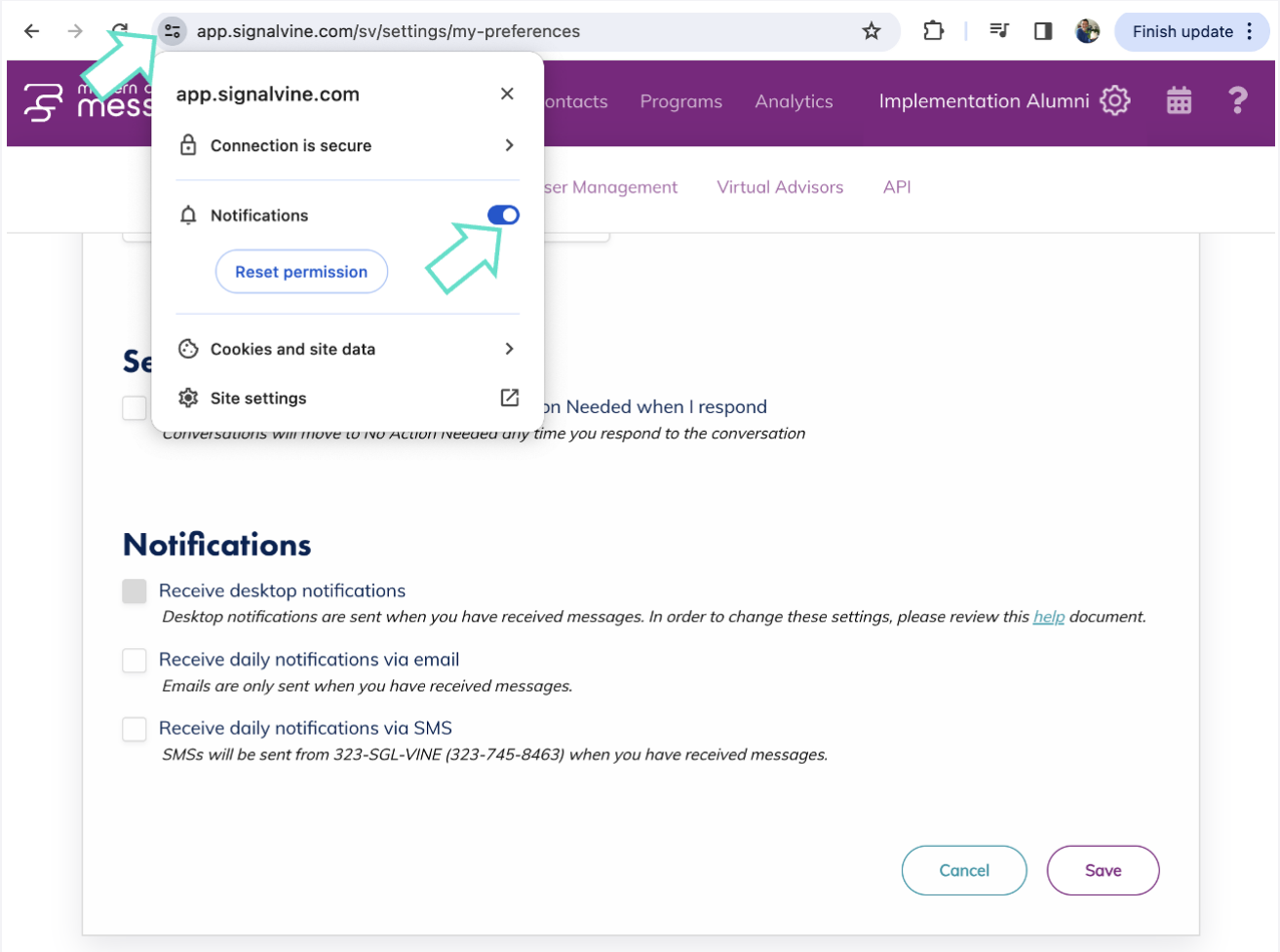


2. Under the **My Preferences** tab scroll to **Notifications**.
3. Check the box next to **Receive desktop notifications**.

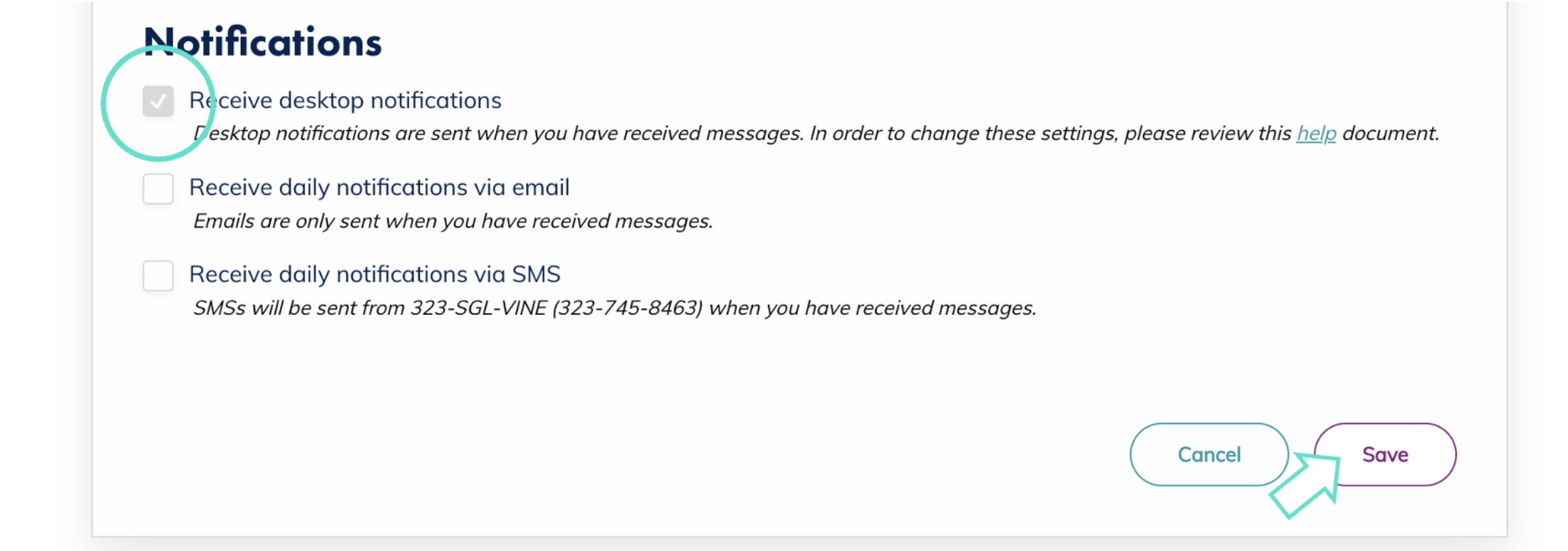


3. If that box is greyed out, click the symbol to the left of your URL. This could look like two circles and two lines or a lock symbol.

4. Toggle on to allow notifications.



5. Click out of the menu and hit **Save** at the bottom right of your screen.

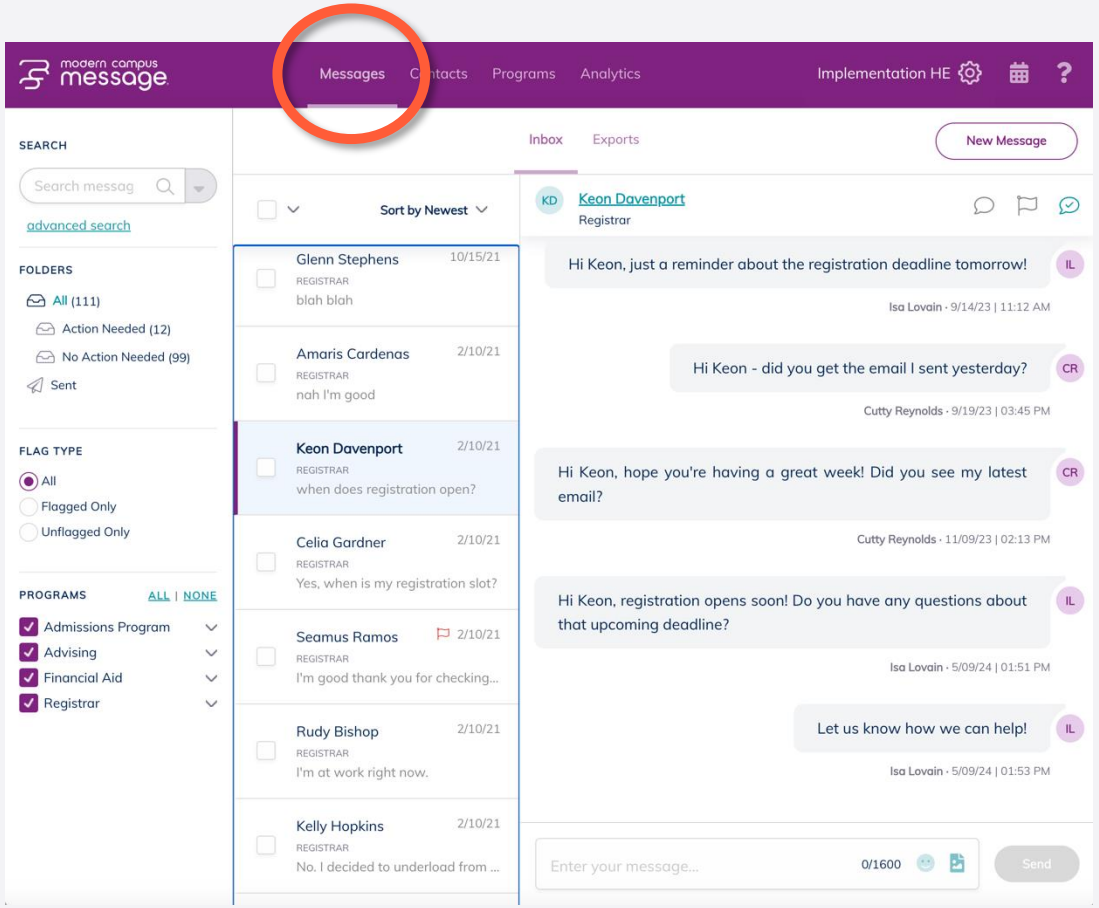


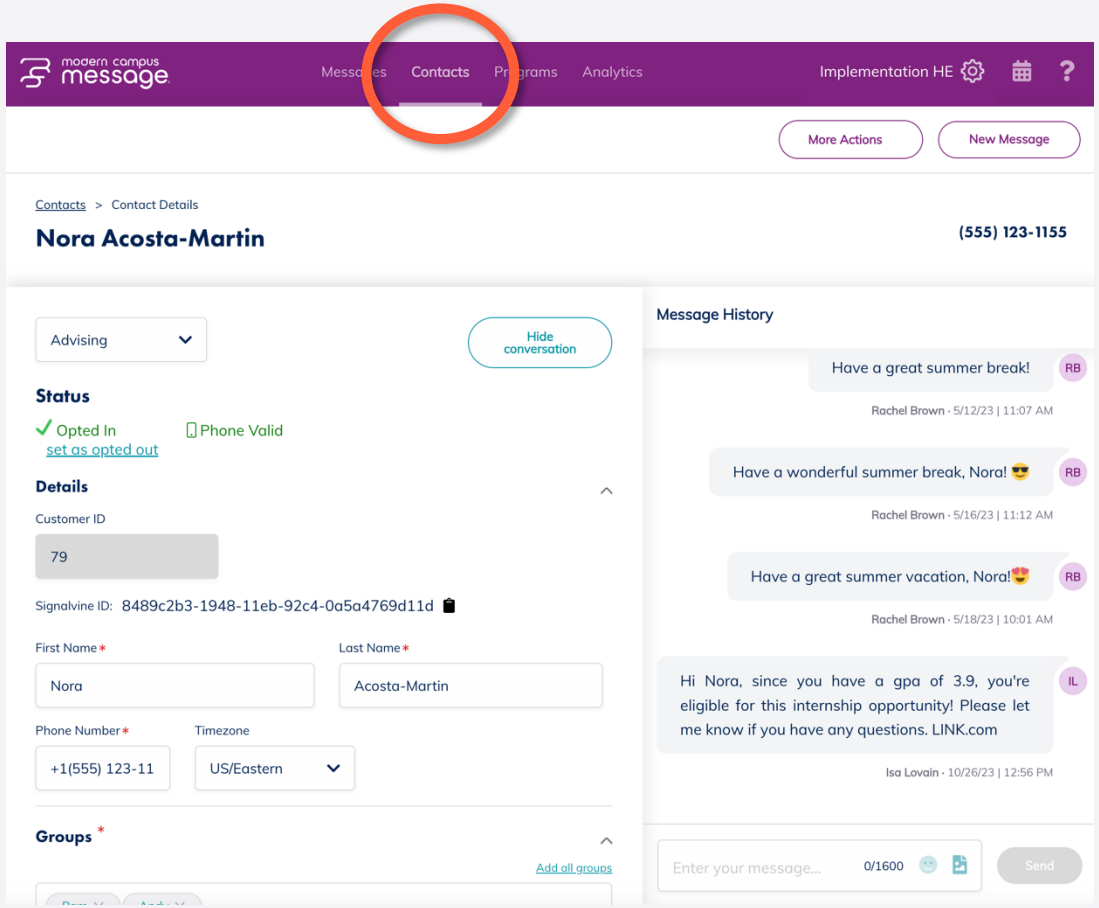
Message Demo

- Go to settings
- Demo turning on automatic no action needed
- Demo turning on and off desktop notifications

One-to-one Messaging

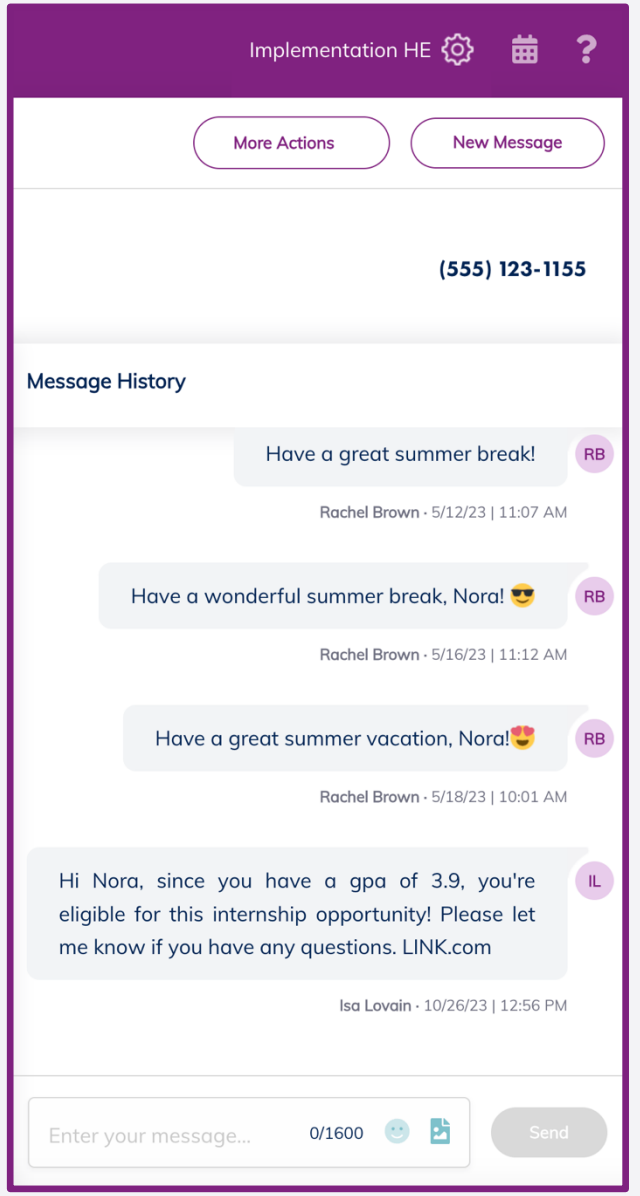
Texting One-on-one





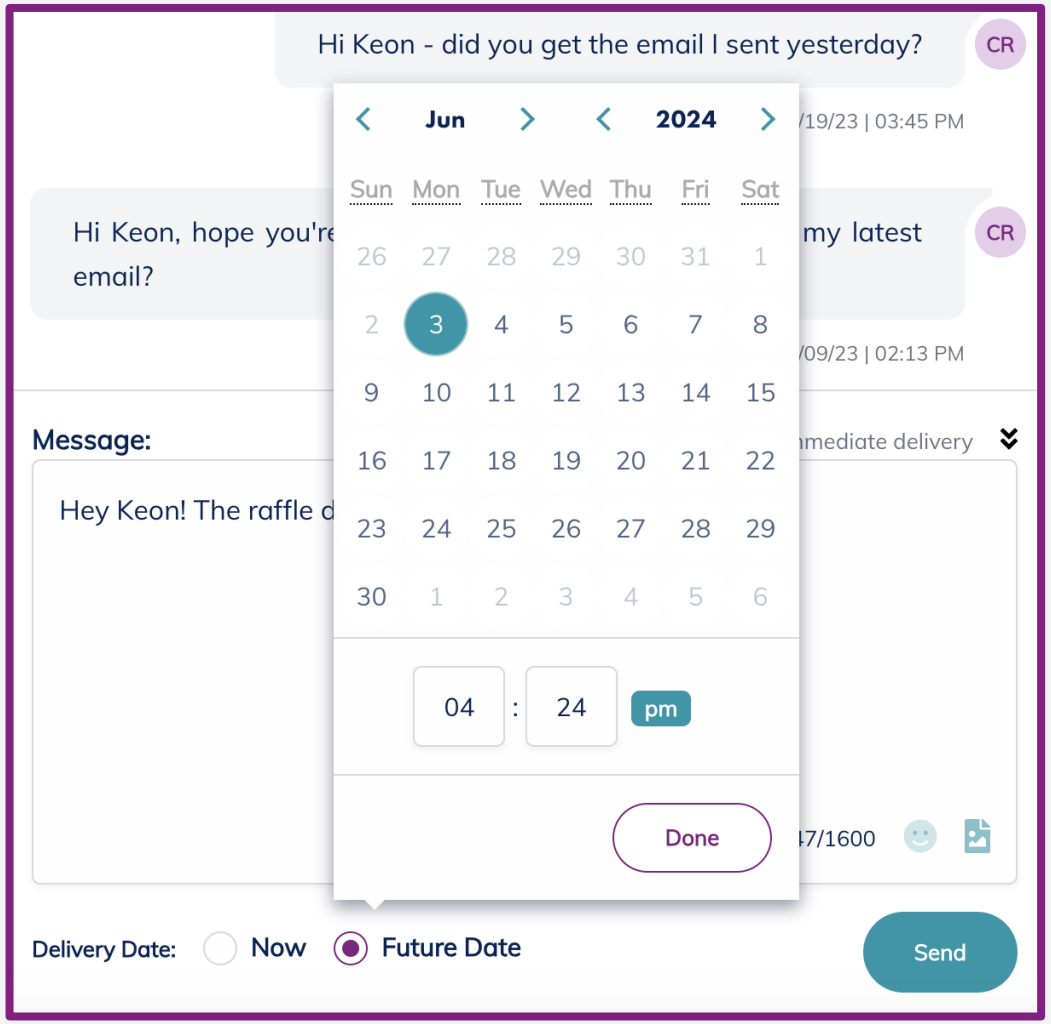
One-on-on Messages

- Method 1
  - Select contact from the **Messages** inbox
  - Text from the bottom right corner
- Method 2
  - Select the **Contacts** tab
  - Search for your Contact
  - Select their name
  - Text from the bottom right corner



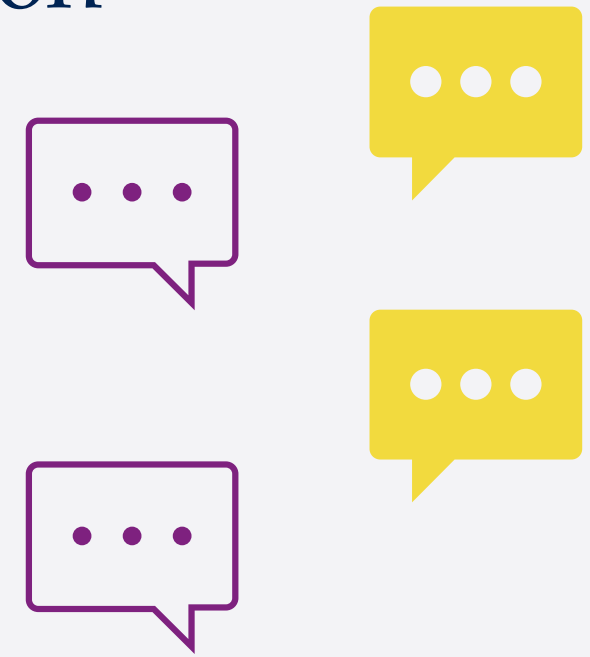
Schedule One-on-on Messages

- Write your message
- Select **Future Date**
- Click **Send**
- Check your scheduled message on the new tab that appears in your conversation!



When to use One-on-one Messages

1. Info relevant to only one person
2. Info that's sensitive
3. Personal question
4. Message response

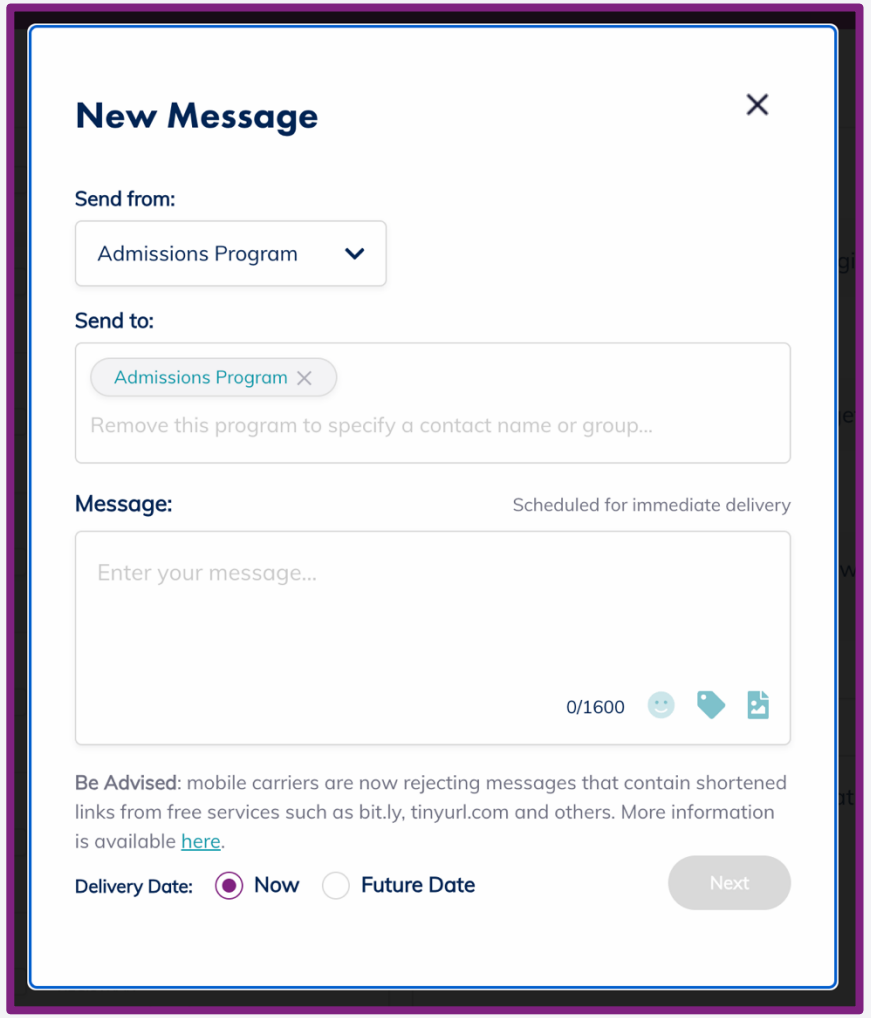


Quick Group Bulk Messaging

*always sent as individual texts to each contact!

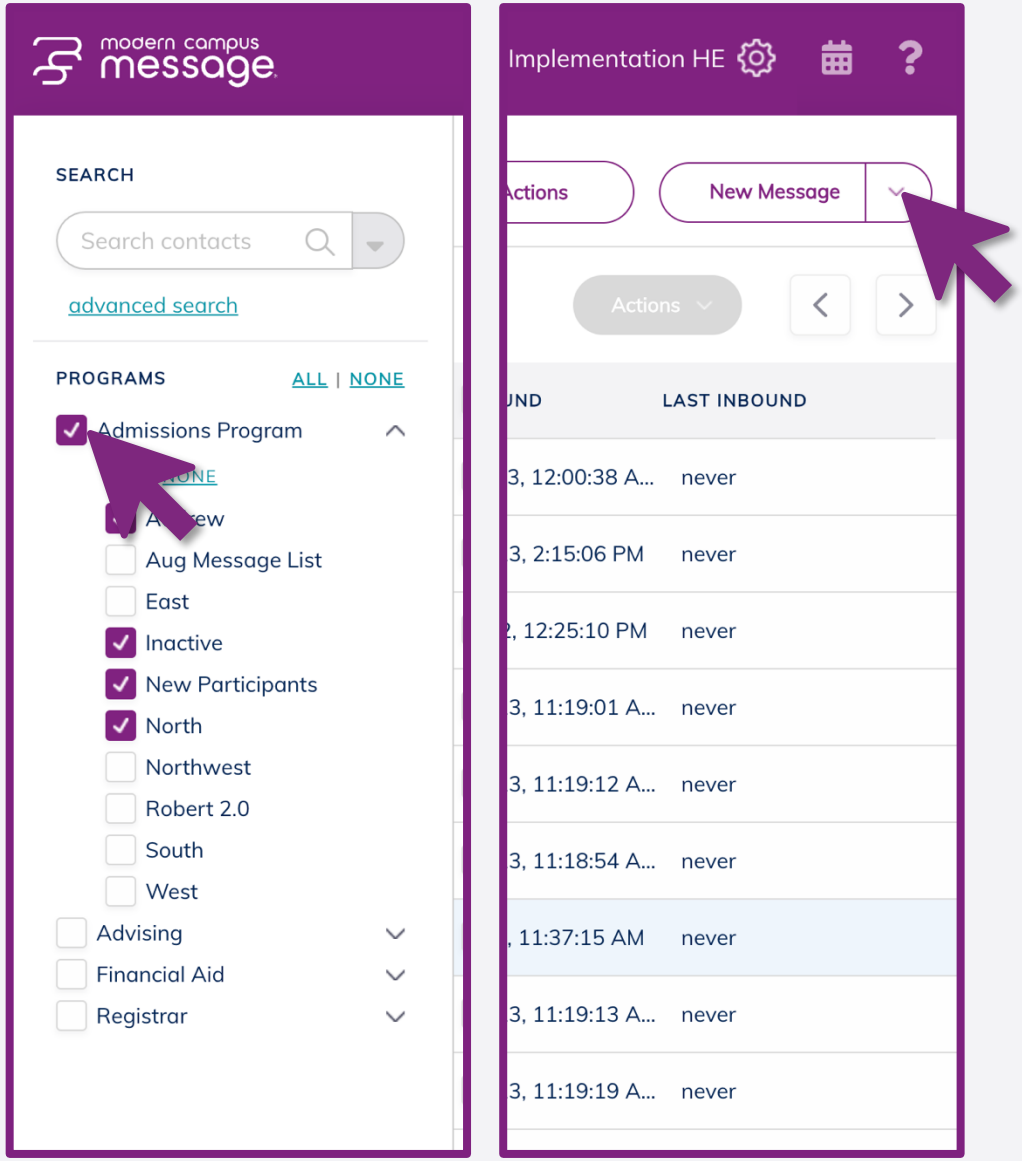
Quick Bulk

- Select **New Message**
- Select program
- Optional, narrow down by group(s)



Extra Quick Quick Bulk

- Narrow down program and group on the left menu
- Select he **Arrow** next to **New Message**
- Write and send/schedule your message!



When to use Quick Messages

1. One-time announcements
2. Question for a specific audience
3. Reminder about an event
4. Reminder about a form

Make use of…

- Program and group segmentation
- Personalization fields (first_name, location, credential etc.)

Demo quick groups

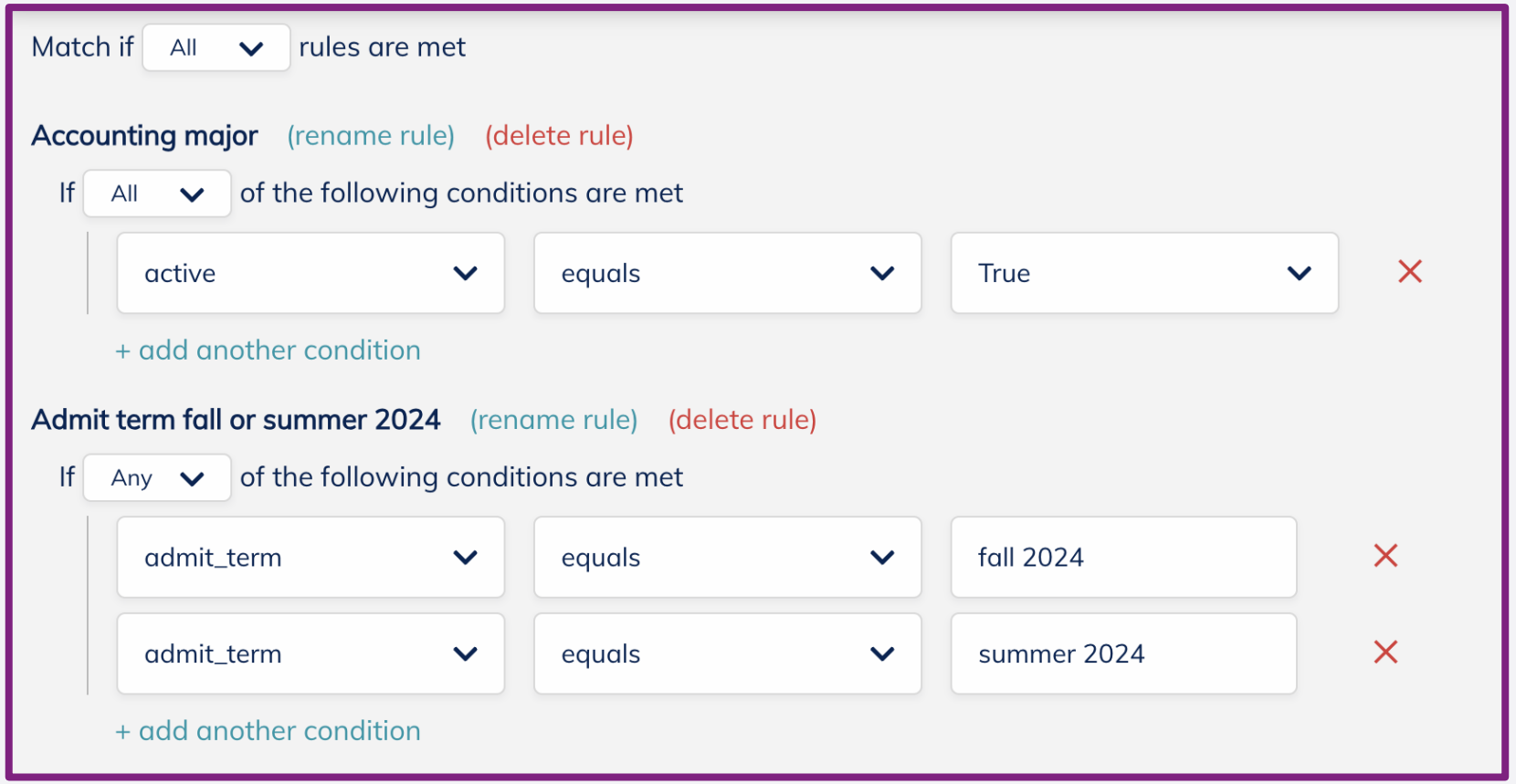
- Show starting from scratch
- Show using “Send to current results”

Advanced Seach

Use your data to create custom groups

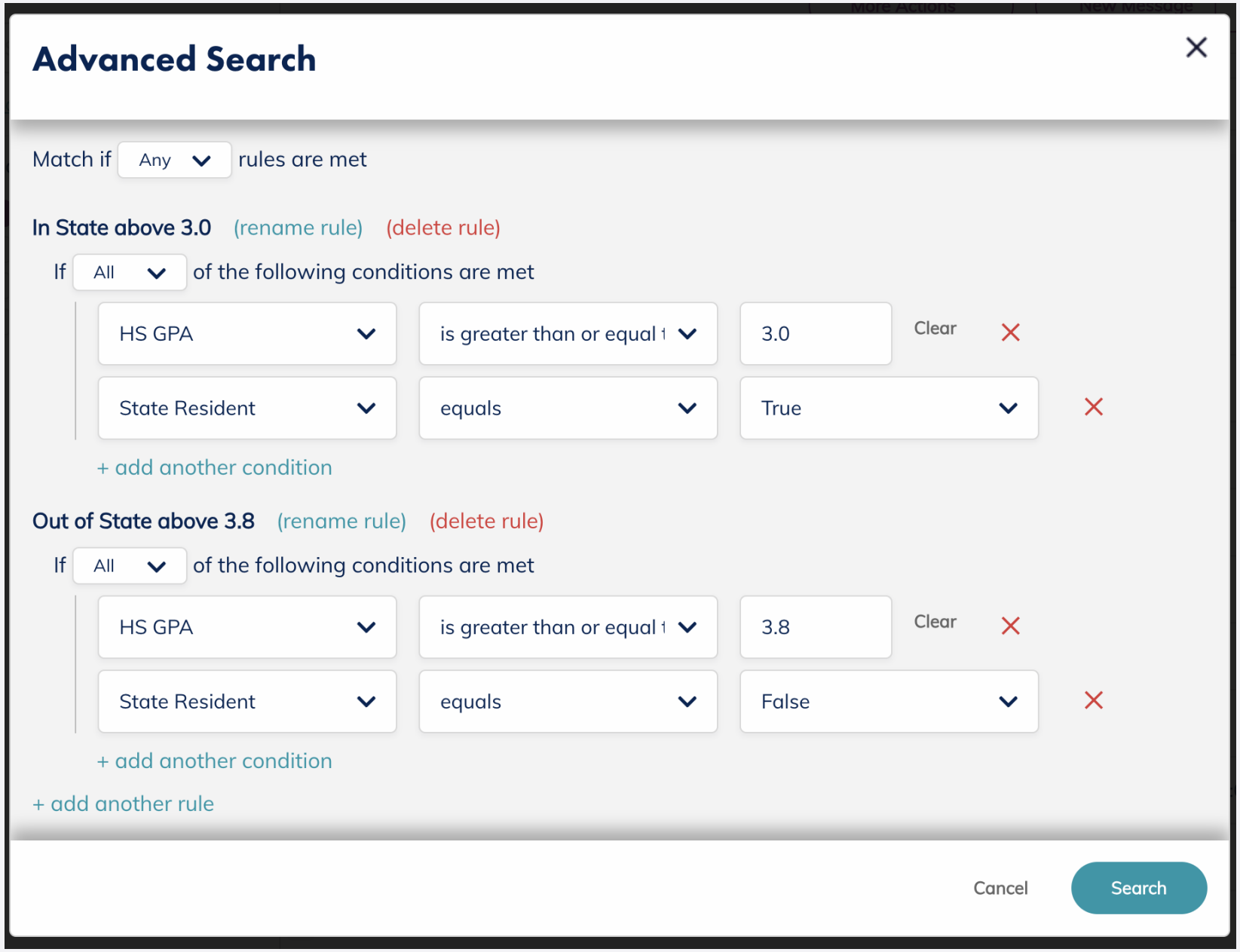
Advanced Search

- Hyper-segment your contacts using data
- And/or search functions
- Get the right message to the right person



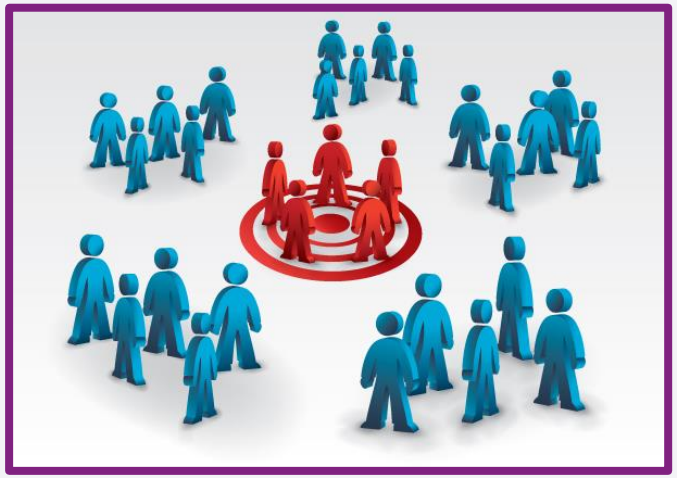
New Scholarship Alert!

- We have a new scholarship opportunity available to both in and out-of-state students!
- The criteria are different depending on where you're from
  - In state – 3.0 and above
  - Out of state – 3.5 and above


Advanced Search
Match if Any rules are met
In State above 3.0 (rename rule) (delete rule)
If All of the following conditions are met
HS GPA
is greater than or equal t
3.0
Clear
State Resident
equals
True
+ add another condition
Out of State above 3.8 (rename rule) (delete rule)
If All of the following conditions are met
HS GPA
is greater than or equal t
3.8
Clear
State Resident
equals
False
+ add another condition
+ add another rule
Cancel
Search

When to use Advanced Search

1. You want to use data to target contacts
2. You don't want to send to ALL members of a program or group
3. You want to send at a specific time / date
4. Examples
    1. Text all contacts in Philadelphia
    2. Text all Chemistry & Biology majors with a 3.0 or higher



Platform Demo

- Prior_donor = True

"Because of donors like you, our high school outreach event was possible! Thank you for your generosity, [First Name]. We're grateful for your continued support!"

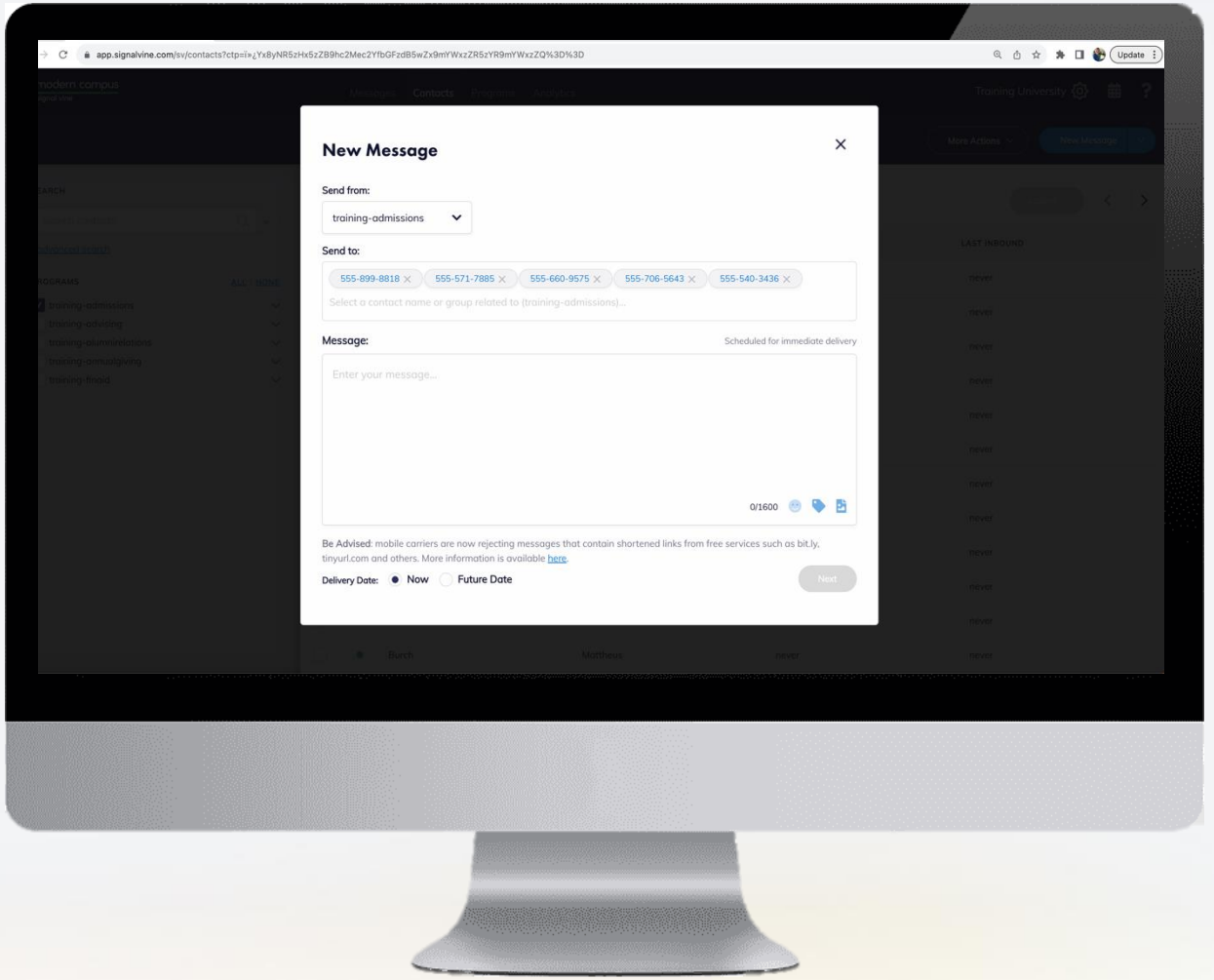
- Prior_donor = False
- Prior_donor = blank
- "Hi [First Name], did you know that even a small gift can make a big impact for bringing scholarships to students in need? Join your fellow alumni in making a difference today: www.cu.edu/donate

Bulk Copy + Paste

Create a new message from an outside list of numbers

Copy and Paste a List

- Copy a comma separated list of phone numbers or ID numbers directly into ”Send to:”



Comma Separated List

NOT Comma Separated ❌

Germain	Duplock	555-899-8818
Morten	Crumbie	555-571-7885
Neala	Dabney	555-660-9575
Sterne	Measham	555-706-5643
Erie	Tilbrook	555-540-3436

Comma Separated ✅

Germain	Duplock	555-899-8818,
Morten	Crumbie	555-571-7885,
Neala	Dabney	555-660-9575,
Sterne	Measham	555-706-5643,
Erie	Tilbrook	555-540-3436,

NOT Comma Separated ❌

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Comma Separated ✅

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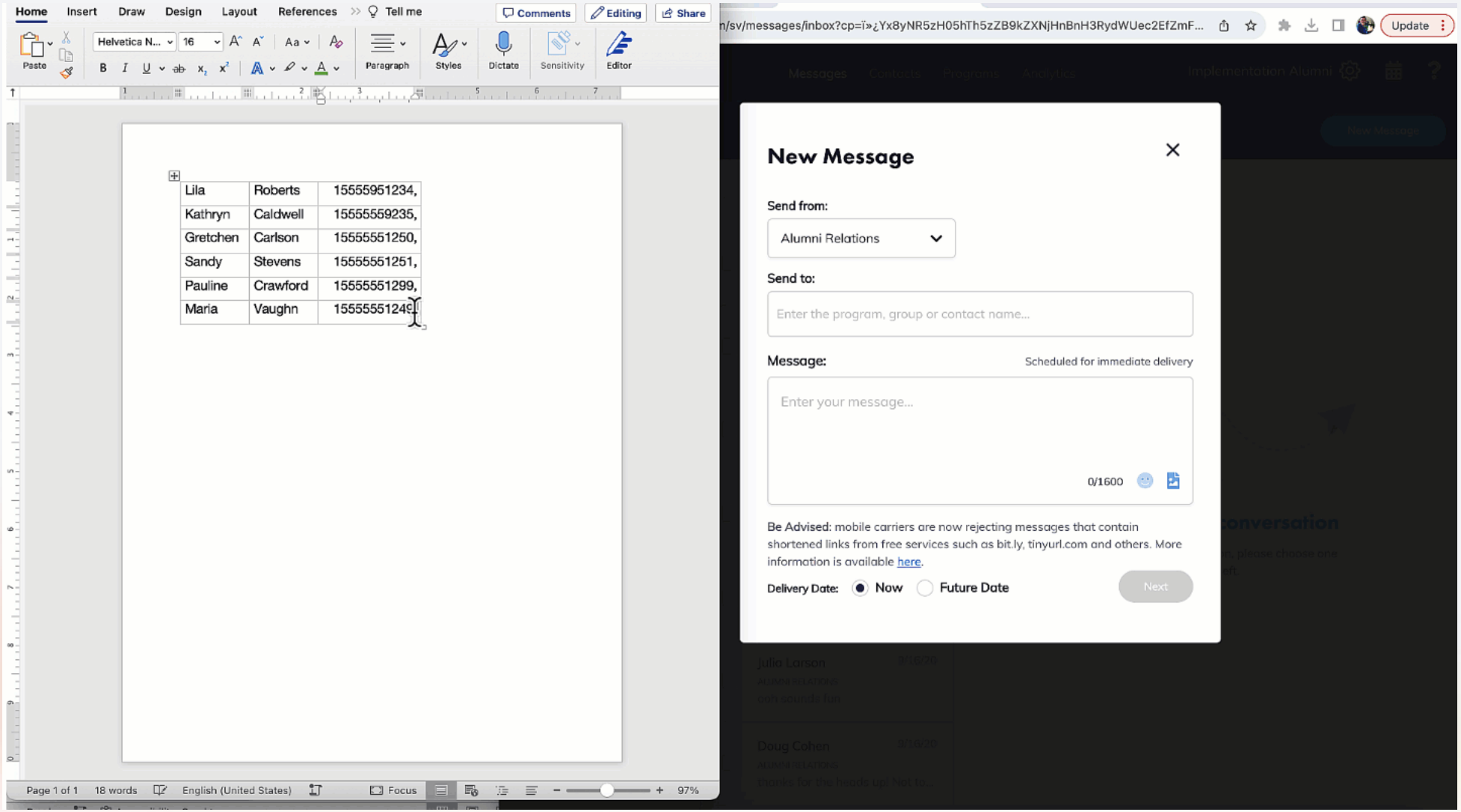
Erie	Tilbrook	555-540-3436,

Copy and Paste!



When to use Bulk Copy + Paste

- You have a list of phone numbers or ID numbers
- You don't need to save the group or other data
- Examples
  - Follow up after an event
  - Pulled a report of student leaders

Poll #2

What type of messages do you plan on sending?

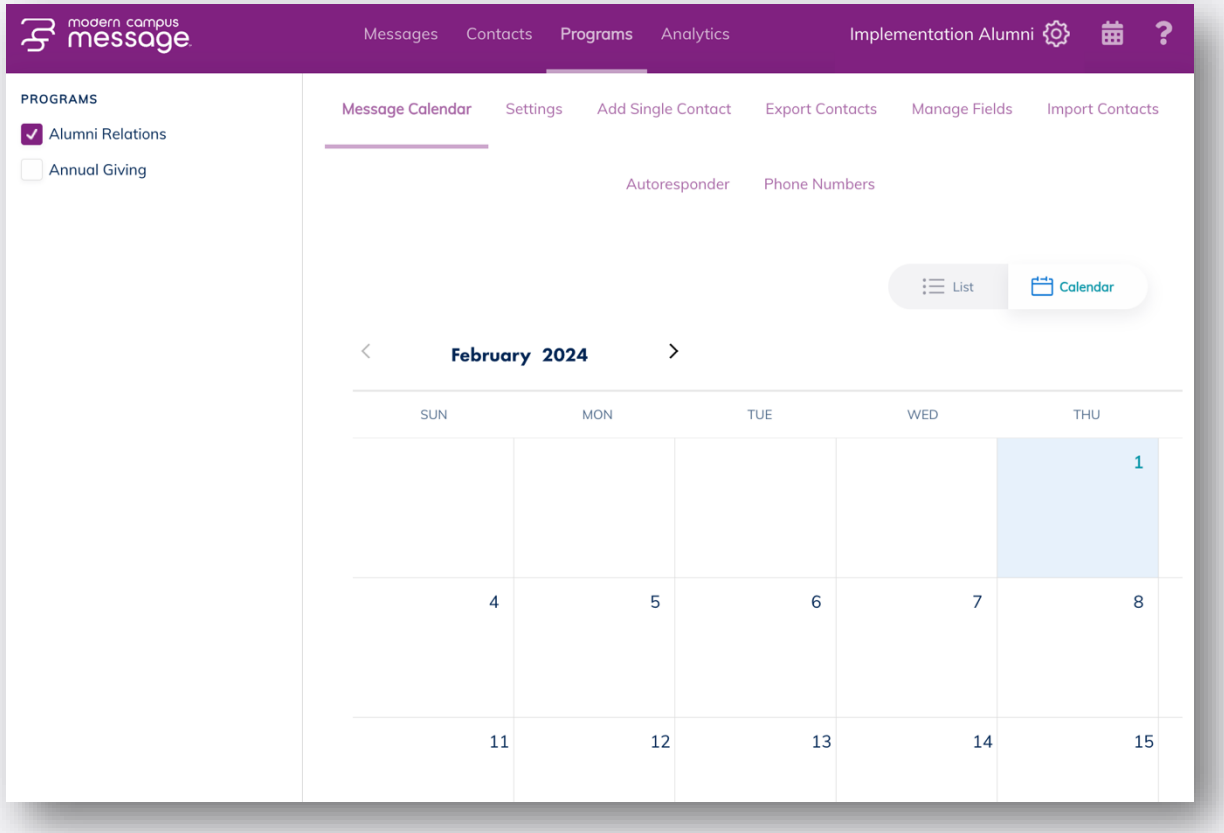
How are you feeling so far about Message?

Programs Tab

Manage your contacts and message calendar

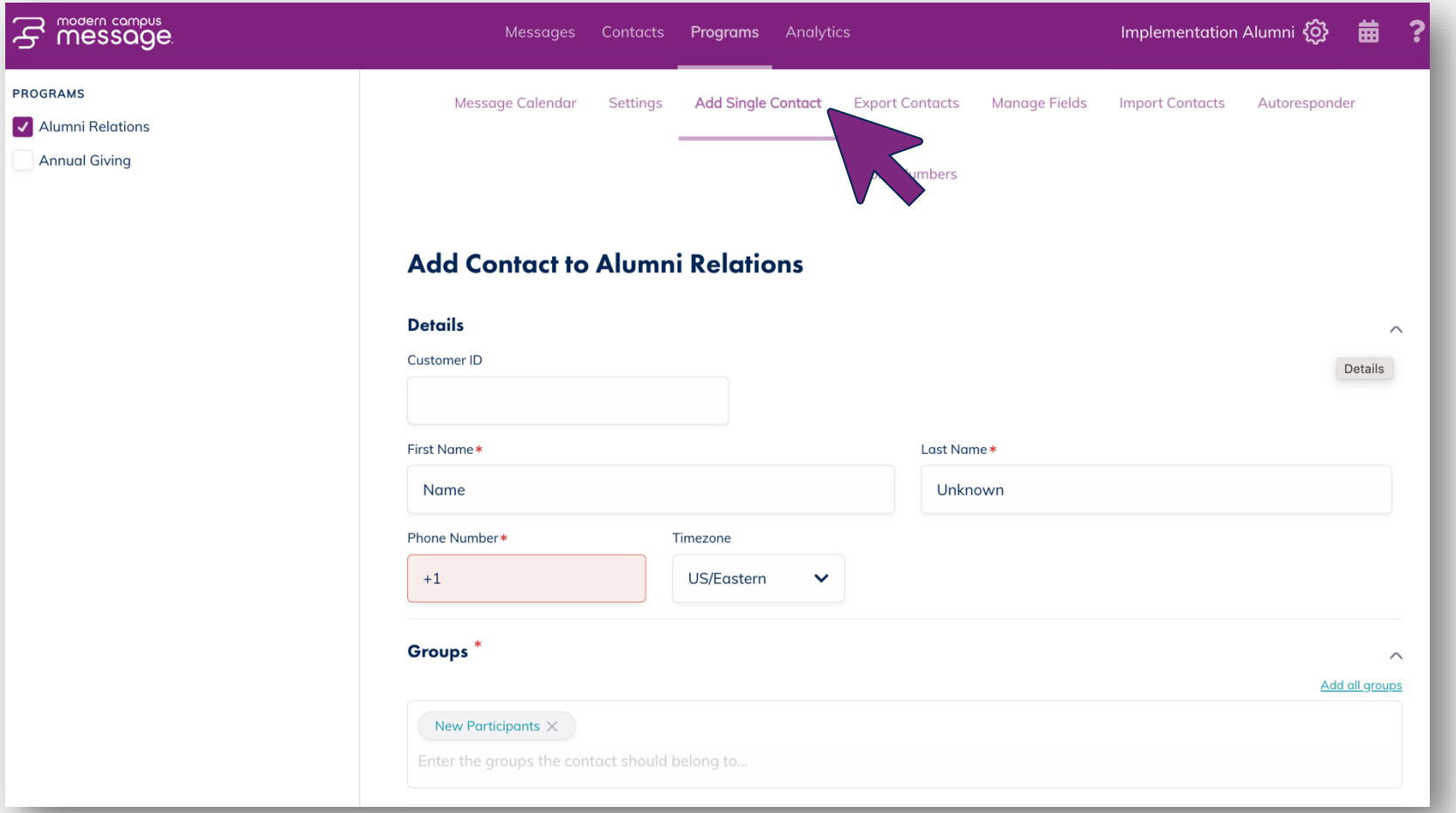
Message Calendar

- Shows messages scheduled for 2+ contacts
- Shows scheduled messages for YOUR caseload
- You can edit / delete messages
- DO NOT edit Program Messages (anything you set up with customer support)



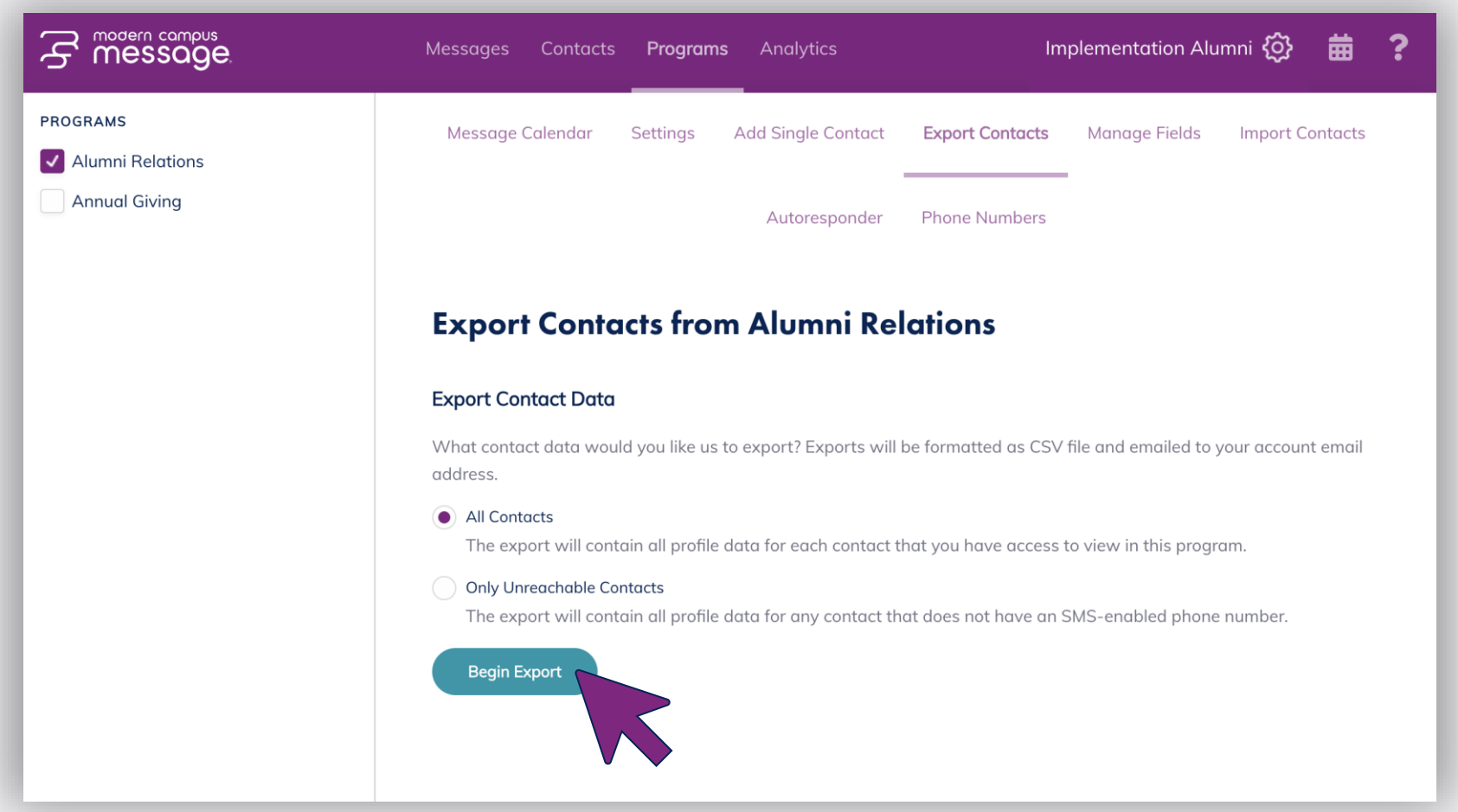
Add a Single Contact

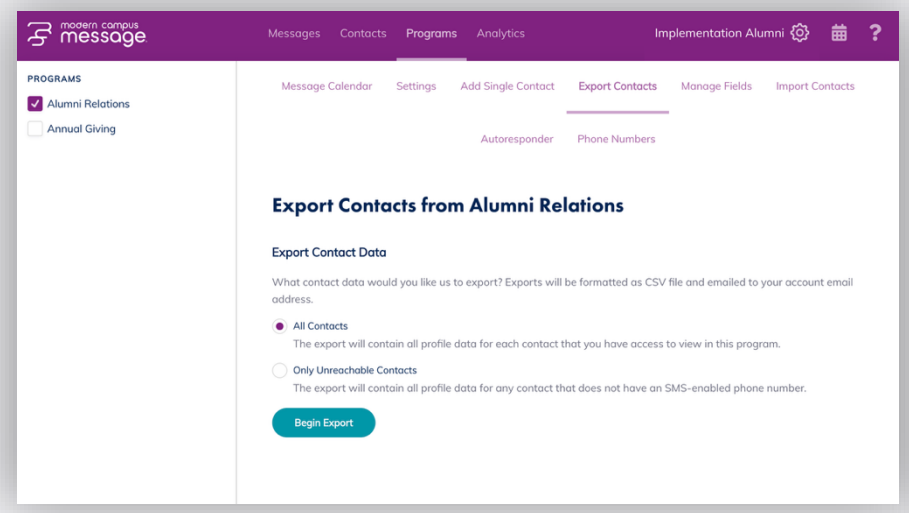
- Required fields
  - Name
  - Phone Number
  - Group(s)
- Include a Customer ID!



Export Contacts

- Exports a .csv file
- Sent to your email
- Limited to every 2 hours
- Could take a few minutes!





[Modern Campus Message] Your requested export is ready!

SV

Signal Vine <support@signalvine.com>

Today at 10:27 AM

To: kseale+2@moderncampus.com

To protect your privacy, some external images in this... Download external images Go to Settings

You don't often get email from support@signalvine.com. Learn why this is important

Kelsey,

The Modern Campus Message contact export for Alumni Relations you've requested is now ready.

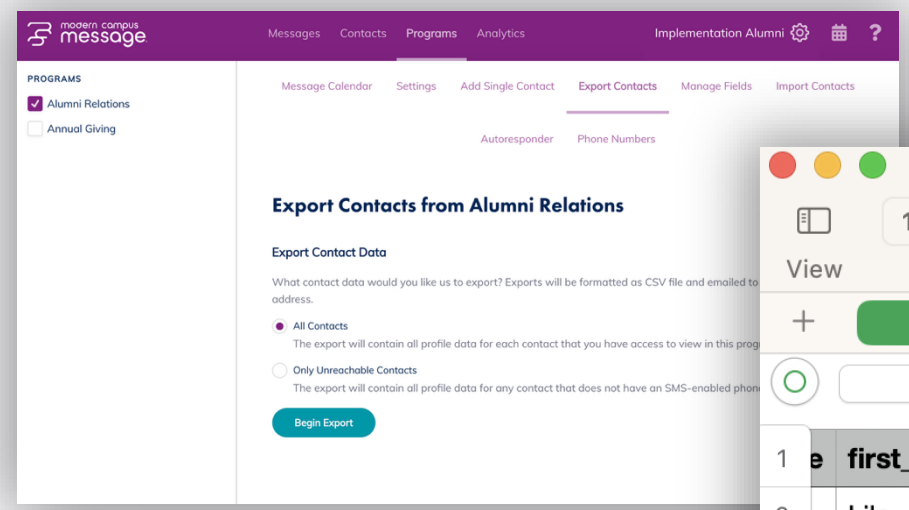
[Download the Report]

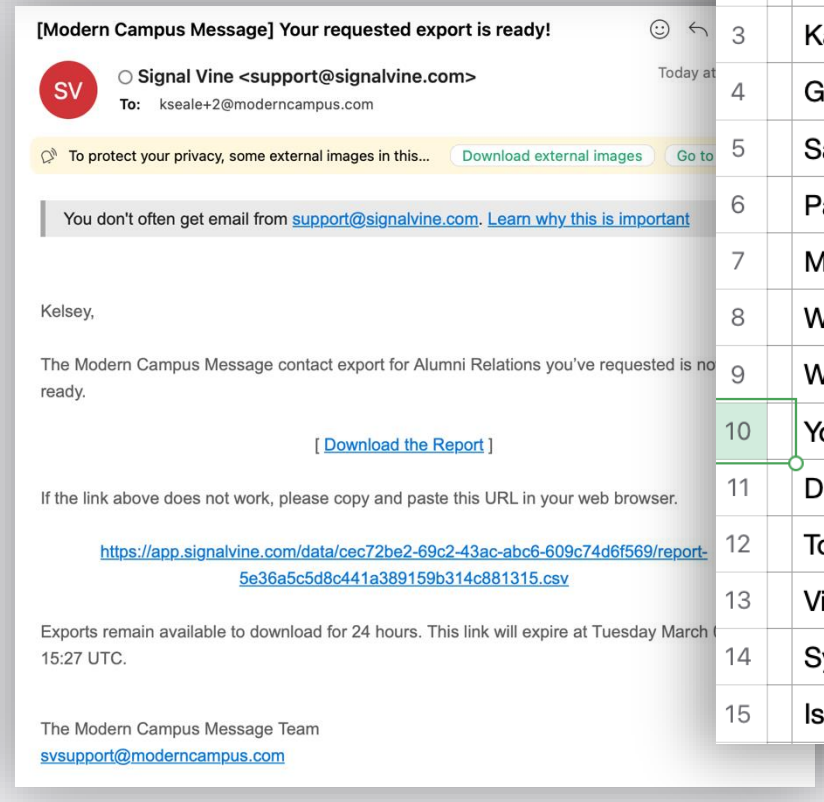
If the link above does not work, please copy and paste this URL in your web browser.

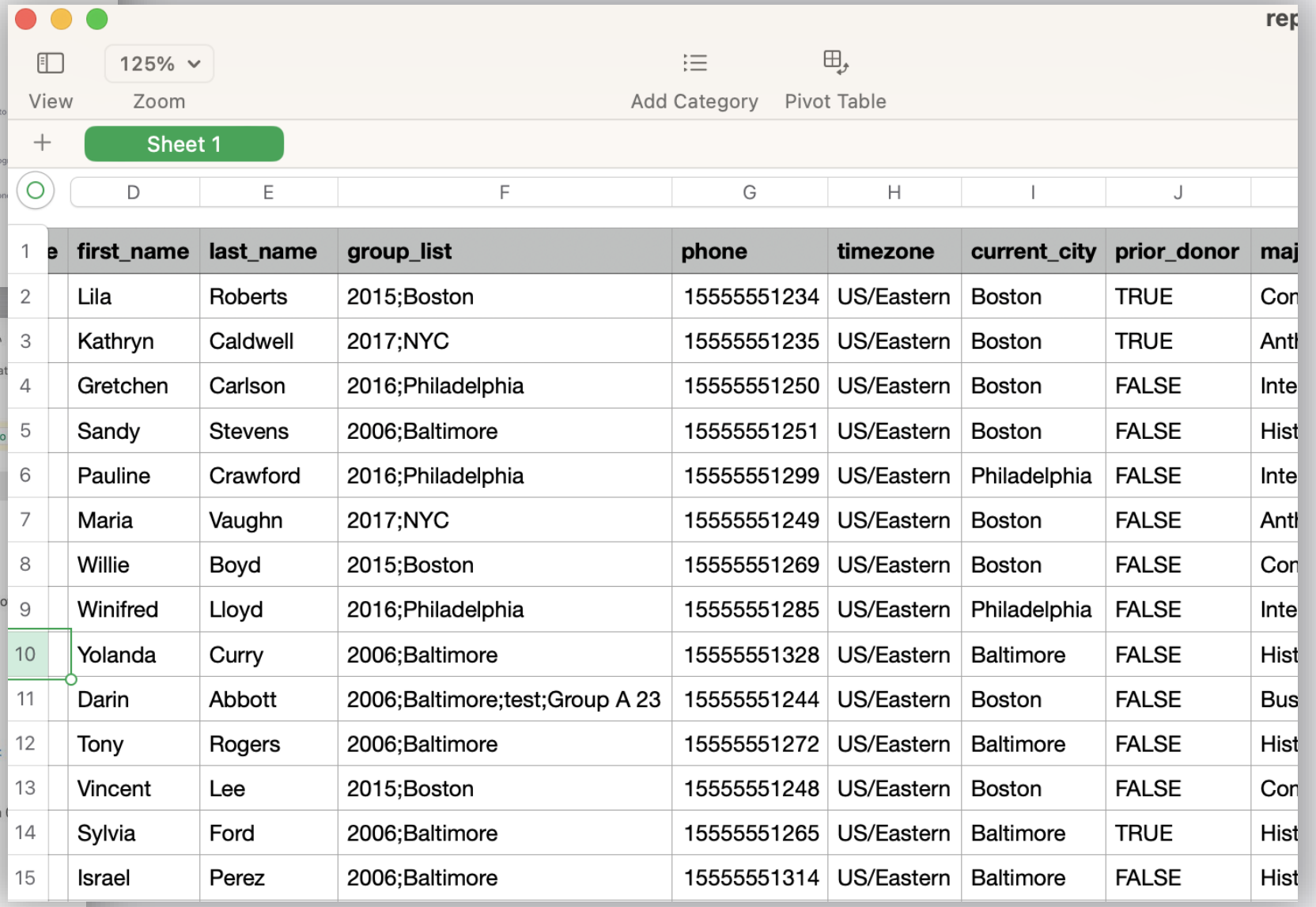
https://app.signalvine.com/data/cec72be2-69c2-43ac-abc6-609c74d6f569/report-5e36a5c5d8c441a389159b314c881315.csv

Exports remain available to download for 24 hours. This link will expire at Tuesday March 05 at 15:27 UTC.

The Modern Campus Message Team
svsupport@moderncampus.com



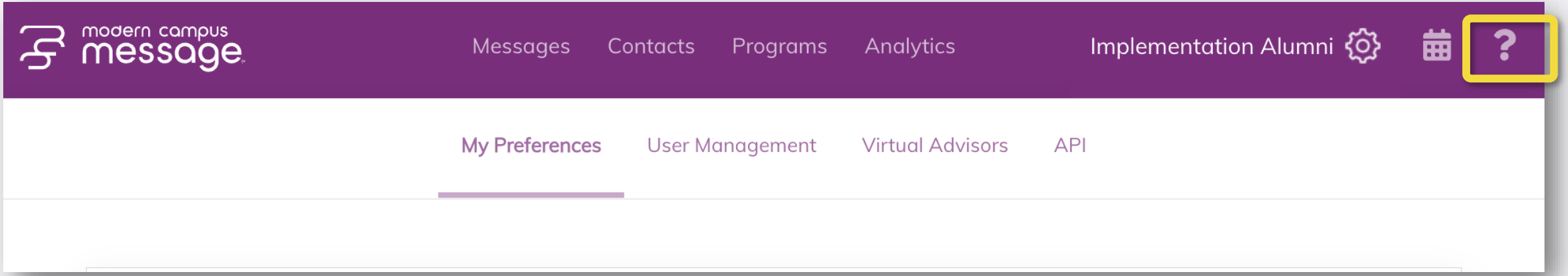




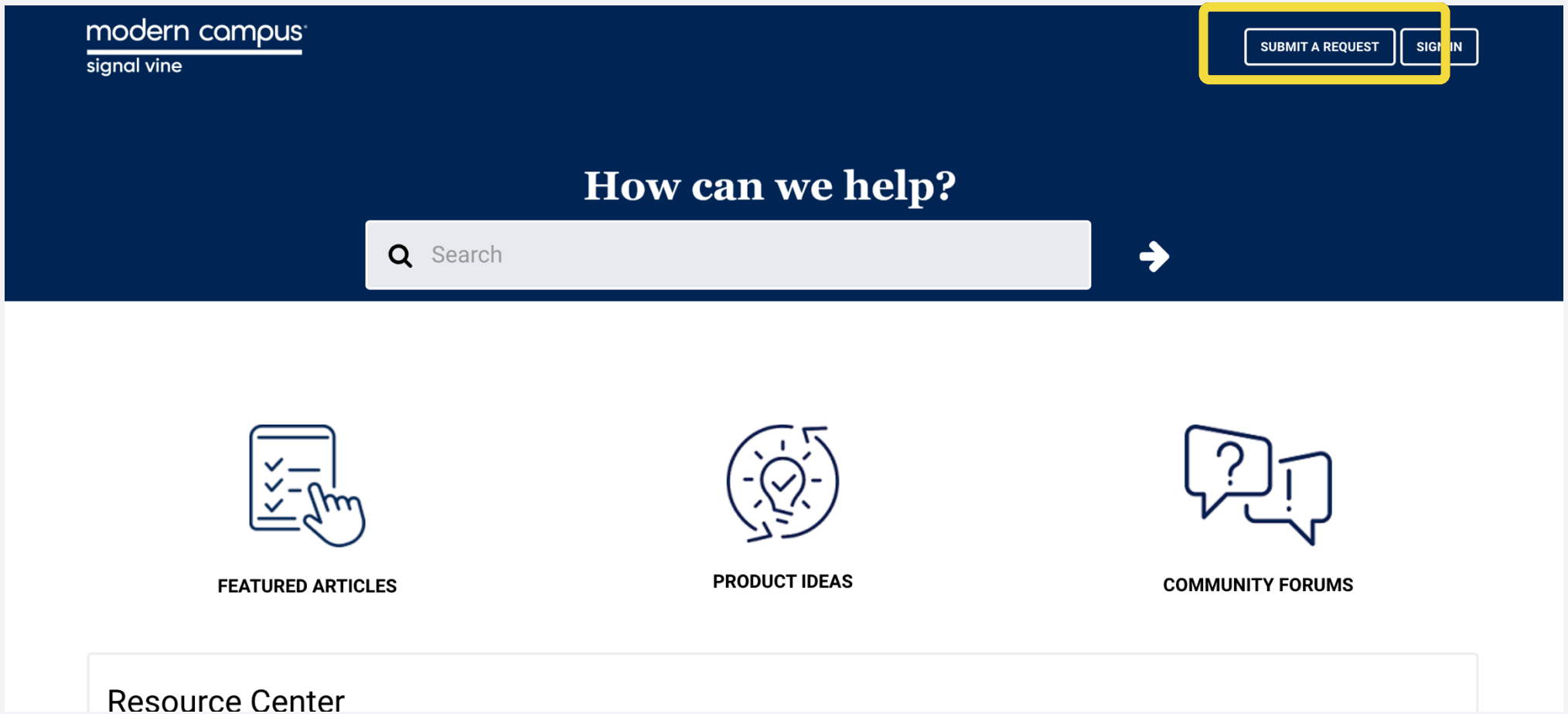
	D	E	F	G	H	I	J
1	first_name	last_name	group_list	phone	timezone	current_city	prior_donor
2	Lila	Roberts	2015;Boston	15555551234	US/Eastern	Boston	TRUE
3	Kathryn	Caldwell	2017;NYC	15555551235	US/Eastern	Boston	TRUE
4	Gretchen	Carlson	2016;Philadelphia	15555551250	US/Eastern	Boston	FALSE
5	Sandy	Stevens	2006;Baltimore	15555551251	US/Eastern	Boston	FALSE
6	Pauline	Crawford	2016;Philadelphia	15555551299	US/Eastern	Philadelphia	FALSE
7	Maria	Vaughn	2017;NYC	15555551249	US/Eastern	Boston	FALSE
8	Willie	Boyd	2015;Boston	15555551269	US/Eastern	Boston	FALSE
9	Winifred	Lloyd	2016;Philadelphia	15555551285	US/Eastern	Philadelphia	FALSE
10	Yolanda	Curry	2006;Baltimore	15555551328	US/Eastern	Baltimore	FALSE
11	Darin	Abbott	2006;Baltimore;test;Group A 23	15555551244	US/Eastern	Boston	FALSE
12	Tony	Rogers	2006;Baltimore	15555551272	US/Eastern	Baltimore	FALSE
13	Vincent	Lee	2015;Boston	15555551248	US/Eastern	Boston	FALSE
14	Sylvia	Ford	2006;Baltimore	15555551265	US/Eastern	Baltimore	TRUE
15	Israel	Perez	2006;Baltimore	15555551314	US/Eastern	Baltimore	FALSE

Knowledge Base + Support

Knowledge Base



Submit a Help Ticket!



What will you put into practice after this webinar?

Answer in the poll!

Q&A

Please put your questions into
the Zoom Q&A feature!

Thank You

See you next month!