Radius Training

Communication Plans and Campaigns

5/26/2015
Introductions

Tell us a bit about yourself
– Name and department
– How long have you been at UC?
– Tell us something interesting about yourself or the most interesting place you’ve traveled to
Introductions

Training Team

✓ Stephanie Schuckman – Training Lead
✓ Jordan Menefield – Training Specialist
✓ Matt Robinson – Training Specialist
✓ Leah Kobayashi – Training Consultant
Help

• Online Help and Resources
  uc.edu/catalyst/training

• Technical Support
  UCIT helpdesk 513-556-4357

• Business Procedures
  Email us at catalysttraining@uc.edu
Course Learning Objectives

• Creating email templates
• Targets and exclusions overview/recap
• Campaigns
• Communication plans
• New terminology uc.edu/catalyst/radius-glossary
EMAIL TEMPLATES AND TARGETS
Email Templates

• Email templates are branded email messages utilized for sending bulk emails to contacts
  – Necessary in determining how the email will look to the student
  – Ideally would be associated with the home office or college sending the communication

• **Important:** email templates should be **cloned** and **saved** as a new **email template** to keep proper UC branding and formatting
Create New Email Template

EMAIL TEMPLATE

**Email Template Information**

* Name: 
* Subject: 
* Folder: Type to search EmailTemplatesFolder

**Email Template Body**

Message:

- Merge Fields
  - Merge Module: 
  - Select Field: 
  - Copy Field: 
  - Insert

- Merge Views
  - Merge Module: 
  - Select View: 
  - Copy View: 
  - Insert

Styles: 
Format: 
Font: 
Size: 
Conditional Section
Completed Email Template

**Email Template Information**

- **Name:** Application Form Submission Confirmation
- **Subject:** Registration Confirmation for ${Contacts.First Name} ${Contacts.Last Name}
- **Folder:** Program Templates

**Email Template Body**

**Message:**

Dear ${Contacts.First Name} ${Contacts.Last Name}, Thank you for completing the application form. We shall get back to you with more information in the near future.
Email Template: Merge Fields

• Merge Fields
  • Utilized to input specific information about the contact record to personalize the email communication
  • For example, showing “Dear John” or “Dear Amy” when sending out a mass communication
Email Template: Conditional Section

• Conditional Section
  • Utilized to show or hide a portion of the message based on specified criteria
  • For example, showing information about in-state tuition to Ohio residents only
Accessing Radius

1. Using Mozilla Firefox or Google Chrome, go to [catalyst.uc.edu](http://catalyst.uc.edu)
2. Login with your Central Service Logon: Username (6+2) and Password
3. Click on Radius

Please note: when working remotely off campus, you will need to use the VPN (Virtual Private Network)
Email Templates

Exercise #1: Cloning and Editing an Email Template
Targets and Exclusions

• Targets and exclusions are necessary to determine who will receive communications
  *Detailed information on how to build a target is included in the Criteria Building and List View Course

• Targets and Exclusions Overview
  – Created list of contacts
  – Dynamic target will contain contacts that meet specified criteria at the moment the target is used
  – Static target will contain a fixed list of contacts compiled upon creation of the target
  – Exclusions are utilized for contacts who have opted out of email communications
Questions?

• We learned:
  – How to clone and edit an email template (all templates should be cloned first to maintain UC branding)
  – How to organize templates in a folder
  – Overview/recap of targets and exclusions
CAMPAIGNS
• Overview
  – Campaigns are utilized for the purpose of sending a specific one-time mass communication to an identified target list (100> contacts)
  – Campaigns are sent on a specific date that is determined by the user
  – Campaigns will require an approver (determined by your respective business process)
Creating a Campaign

**Campaign Profile**

- **Campaign Name**: Application is available
- **Channel**: Email
- **Approval Status**: Submitted
- **Publication Type**: General
- **Type**: Direct
- **Status**: Planned
- **Approver**: Ted Magdzinski

**Campaign Goals**

- **Summary**: This campaign will be sent out as notification that applications are now available.
- **Proposed scheduled date**: 8/1/15
Creating a Campaign

Additional tabs will display after the campaign profile is first created:

– Select target List
– View & Edit Message (Email Template)
– Preview & Test
– Schedule
Campaigns

Exercise #2: Creating a Campaign
Questions?

• We learned:
  – How campaigns are used to send a one-time bulk email containing a specific message
  – That Campaigns are used when emailing a list of 100> contacts
  – How to create a campaign
COMMUNICATION PLANS
Communication Plans

• Communication plans are systematic, automated emails sent to students

• Can be used for various reasons
  – Marketing to prospective students
  – Assisting applicants through the application process
  – Assisting students through registration or orientation process

• Sent to targeted students within a specified amount of days upon entering the plan

• Communication Plans are triggered by different actions performed throughout the entire lifecycle of a prospective student or applicant (e.g. Completing an inquiry form or starting an application)
Communication Plans

- Components of Communication Plans
  - Plan Information
  - Entry/Exit Rules
  - Template Details
  - Additional Features
Questions?

• We learned:
  – It is necessary to create targets and templates prior to creating communication plan
  – How to create a communication plan for the purpose of sending emails automatically
  – How to select targets to create an entry rule and exit rule (both are required)
  – How to pull email templates into a plan
Signing Out

To secure your session:

1. Click on the triangle next to your name in the upper right corner of the screen
2. Click on Sign Out
3. Close your browser
Help

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Course Evaluation

Please take the time to complete this survey:

http://www.uc.edu/catalyst/training/course-evaluations.html
Helpful Sites to Remember

Catalyst Portal
catalyst.uc.edu

Online Help and Resources
uc.edu/catalyst/training