Create Recruiting Engagement Plan

STAFF

Workday Student

This tip sheet is intended for anyone interested in learning more about creating an engagement plan for sending coordinated communication to students and prospects, their parents, guardians or other proxies.

Create Recruiting Engagement Plan

A plan is specific to an academic unit and identifies the:

- Plan start and end dates.
- Student messages or student printed items to send.
- Recipients.
- Mailing schedule for engagement items.

Steps

1. Access the **Create Student Engagement Plan** task.
   - Copy an approved engagement plan by selecting **Engagement Copy** from the related actions menu of an existing plan. Workday will copy all values. These values can be changed (Optional).
2. As you complete the **Details** section, consider:

Option	Description
Start Date	The earliest date to send engagement items as part of the plan.
Stop Date	The plan won't send items from this date forward. If the engagement plan is for 1 day only, enter the day after the Start Date. Example: If the plan is for October 30 only, enter a Start Date of October 30 and a Stop Date of October 31.
Category	The category controls the:

	• Engagement items you can include in the plan. Items must have the same category as the plan. • Recipient criteria fields. To run an engagement plan of a specific Category, you need access to its segment-based security group. For more information, see Reference: Engagement Categories and Usages. Category isn't editable when editing or copying a plan.
Academic Unit	Only users assigned to this academic unit or a superior one can edit the engagement plan.

1. As you complete the **Audience** section, consider:

Option	Description
Student Audience	Select the audience that you created using the Create Student Audience task.
Current Audience Count	This field counts the number of recipients that match your student audience. The actual number of recipients might differ when you send the plan.
Recipient Threshold	All engagement plans inherit the default recipient threshold settings from the Maintain Student Engagement Settings task. You can update the threshold on the plan itself. Security: *Modify* access on the *Manage: Sending Campus Engagement* domain.
Send to Email - Priority	If the recipient doesn't have the first email type, Workday sends emails to the next type on the plan. If the recipient doesn't have any of the configured email types, Workday can't send emails to them. To use the *Institutional* email type, the Academic Unit of the engagement plan can't be:

	• Superior to an institution. • Subordinate to an academic unit that's not an institution.

2. Click **Add** to create steps for your engagement plan. As you complete the task, consider:

Option	Description
Item	Select from the category and academic unit that you specified on the plan Details. You can also select from subordinate academic units. Student printed items that use a business form layout are available when student prospects are the only recipients.
Schedule	• You can schedule individual engagement plans and not rely on the tenant-wide engagement plans. • You can associate multiple schedules with 1 engagement plan. • Workday excludes plans with active schedules from tenant-wide and business process evaluations. Specify when to begin sending the engagement items to prospects who meet the criteria: • Start Date: Begin on the date that you select. To send the item on 1 day only, enter the next day in the End Date field. • Send Relative to Item: Example: To send the item 2 weeks after the previous communication, enter *2* for Send After and *Week* for Date Interval. • Enter an End Date for the item if it's different from the plan End Date.
Condition Rule	Select a condition rule for an engagement item. Condition rules enable you to send items to a specific subset of the student audience within the engagement plan. You

	can also use condition rules from a superior academic unit. Use the Create Student Condition Rule task to create new rules based on the report data sources available for student audiences. The business object of the rule should match the primary business object of the student audience.
Estimated Audience	Click the Estimate Audience button to view: • Count of the total audience pending the item (even if outside the plan). • Count of the total audience has already sent the plan. You can estimate the audience before the plan sends.

3. Continue to add other items to your plan, as needed.

Workday:

- Displays the plan on the **Find Student Engagement Items** report.
- Notifies the approver if the engagement plan requires approval.
- Sends communications according to the tenant configuration and updates the History profile group on each prospect profile of the recipient.
- Send a task to the mail coordinator's My Tasks for printed engagement items based on the dates set in the plan.
- Run the plan immediately or set it up to run on a recurring schedule. Select **Student Engagement Plan Launch/Schedule** from the related actions menu of any engagement plan. Setting up a schedule excludes the plan from any tenant-wide configuration or business process evaluation.
- Associate the engagement plan with a recruiting campaign.