

CSU Transfer Planner California Community College Branding and Communicating May 14th, 2024



Agenda

- Branding email templates
- Creating email templates
- Emailing students





Branding Email Templates

Prefabricated Email Templates

- There are five prefabricated email templates in each Community College Transfer Planner Portal.
- Each email template should be branded and modified slightly prior to use.
 - What is the CSU Transfer Planner?
 - Request an appointment with a CCC counselor
 - Meet with one of our California Community College Counselors! Under 2.0
 - Let our CCC Counselors help you apply to Cal State Apply!
 - CSU Transfer Success Pathways

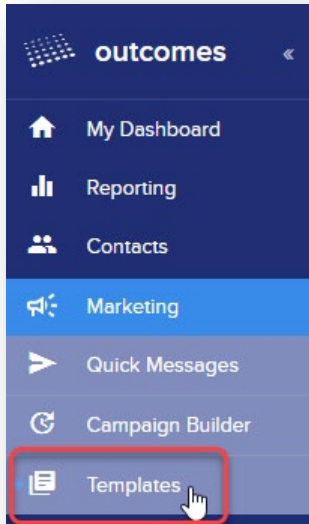


Why update the templates?

- Easy copy them to create new email templates
- Ready to use for quick messages and bulk messages
- Available for campaigns

Finding Email Templates

1. Select **Templates** in the Menu Bar.
2. Click on the desired template (you must update all).

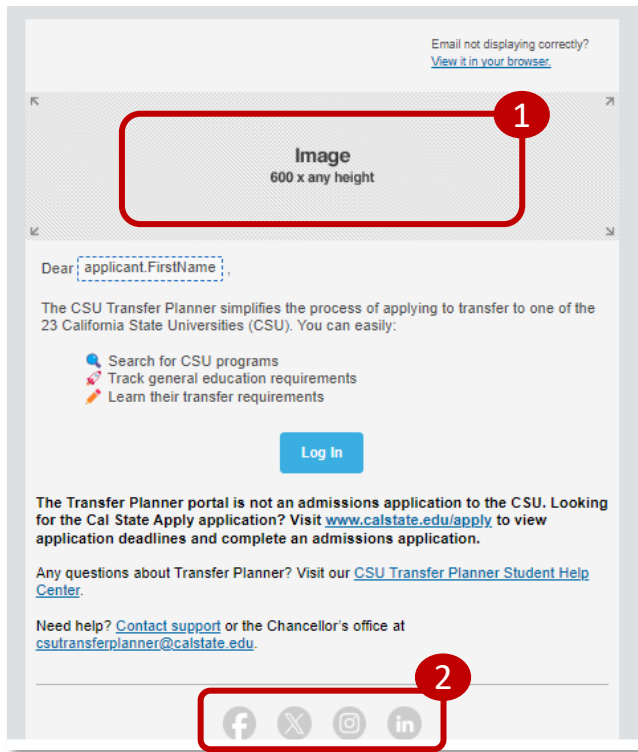


Email Templates / Active (5) ▾

<input type="checkbox"/> Name	Subject
<input type="checkbox"/> What is the CSU Transfer Planner?	What is the CSU Transfer Planner?
<input type="checkbox"/> Request an appointment with a CCC counselor	Request an appointment with a CCC counselor
<input type="checkbox"/> Meet with one of our California Community College Counselors! Under 2.0	Meet with one of our California Community College Counselors!
<input type="checkbox"/> Let our CCC Counselors help you apply to Cal State Apply!	Let our CCC Counselors help you apply to Cal State Apply!
<input type="checkbox"/> CSU Transfer Success Pathways	Discover a new path to the CSU from a California Community College

Branding Email Templates

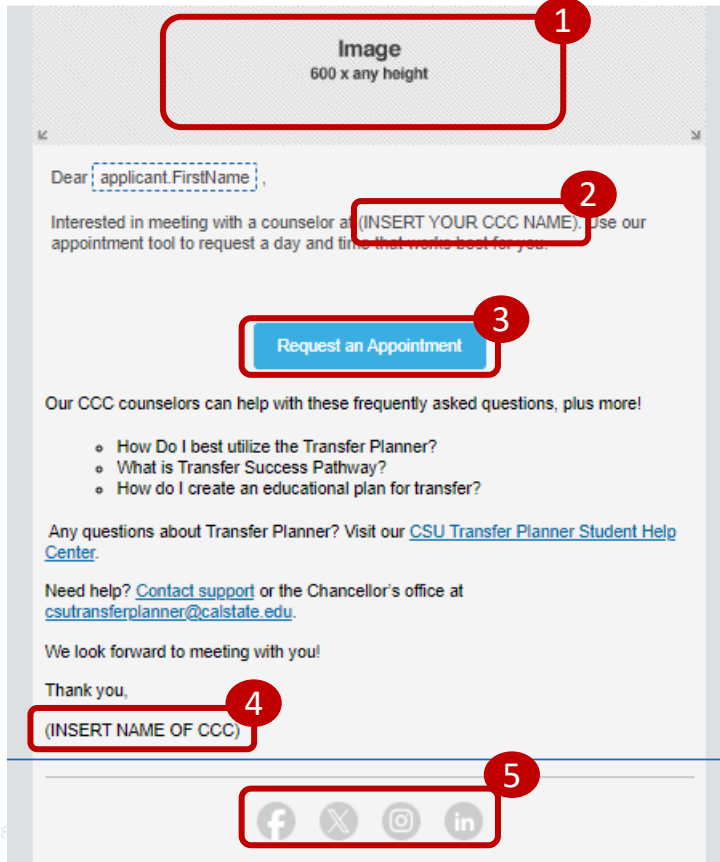
What is the CSU Transfer Planner?



1. Update your logo
2. Add social media links

Branding Email Templates

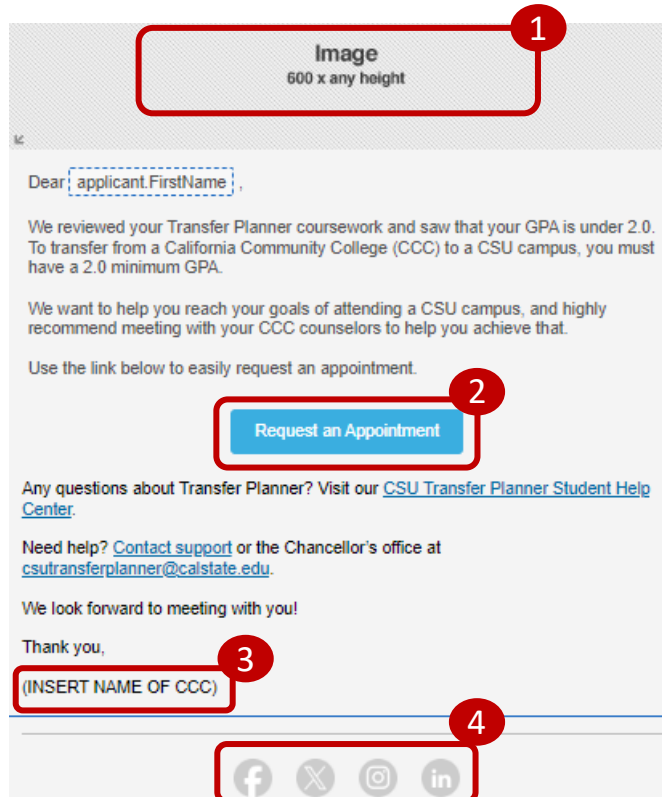
Request an appointment with a CCC counselor



1. Update your logo
2. Insert the name of your college
3. Add a link to your online scheduling system
4. Change the signature of the email to your college
5. Add social media links

Branding Email Templates

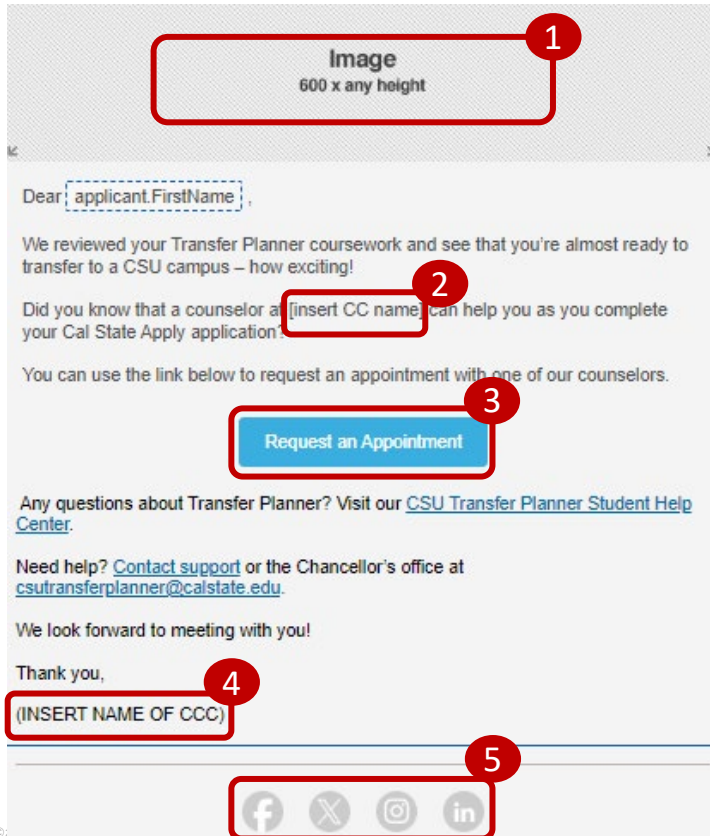
Meet with one of our California Community College Counselors! Under 2.0



1. Update your logo
2. Add a link to your online scheduling system
3. Insert name of college
4. Add social media links

Branding Email Templates

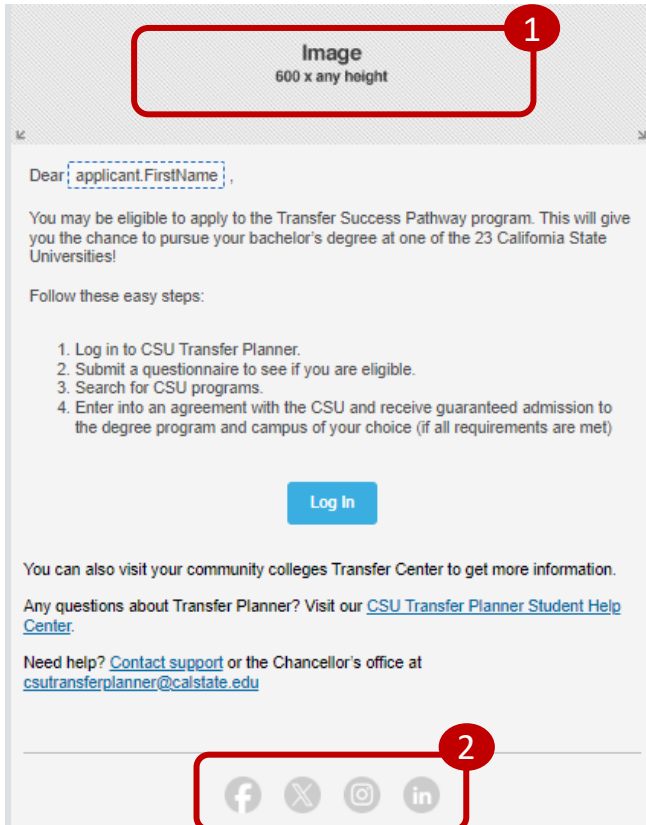
Let our CCC Counselors help you apply to Cal State Apply!



1. Update your logo
2. Insert the name of your college
3. Add a link to your online scheduling system
4. Insert the name of your college
5. Add social media links

Branding Email Templates

CSU Transfer Success Pathways



1. Update your logo
2. Add social media links

Optional Item to Update

- Email templates are configured with a From and Reply-to email address.
- The From email address should not be modified
- The Reply-to email **may be updated** to your campuses email.
 - By default, it is set to Liaison Support
 - Recommended to update the email templates with appointment links.

Customize Email Headers

From:

Bakersfield College Transfer Planner <admissions@csutransferplanner.myliaison.com>

Reply-to:

CSU Transfer Planner Customer Service <support@csutransferplanner.myliaison.com>



Creating New Email Templates

New Email Template

1. Navigate to **Marketing**
2. Then **Templates**
3. Select one of the templates
4. Select **Copy** at the bottom of the screen
5. Select **Copy** again

The screenshot shows a user interface for managing email templates. On the left is a dark navigation sidebar with the following items: 'outcomes', 'My Dashboard', 'Reporting', 'Contacts', 'Marketing' (highlighted in blue), 'Quick Messages', 'Campaign Builder', and 'Templates'. Red callout '1' is next to 'Marketing' and '2' is next to 'Templates'. The main content area is titled 'Email Templates / Active (5)' and contains a list of templates. The first template, 'CSU Transfer Success Pathways', is selected with a checked checkbox. Red callout '3' is next to this checkbox. At the bottom of the list, there are navigation controls: '< Prev', '1 - 5 of 5', and 'Next >'. Below these are three action buttons: 'Copy', 'Delete', and 'Deactivate'. Red callout '4' is next to the 'Copy' button. A status bar at the bottom left of the list shows '1 selected'.

Copy 1 email template?

5

Copy

Cancel

New Email Template Continued

- The new email template will appear at the top of the list of templates.
- Select the newly copied email template.
- Edit the email contents as needed.
 - Name
 - Subject
 - Body of the email

Email Templates / Active (6) ▾

Name

CSU Transfer Success Pathways copy

Details


Name

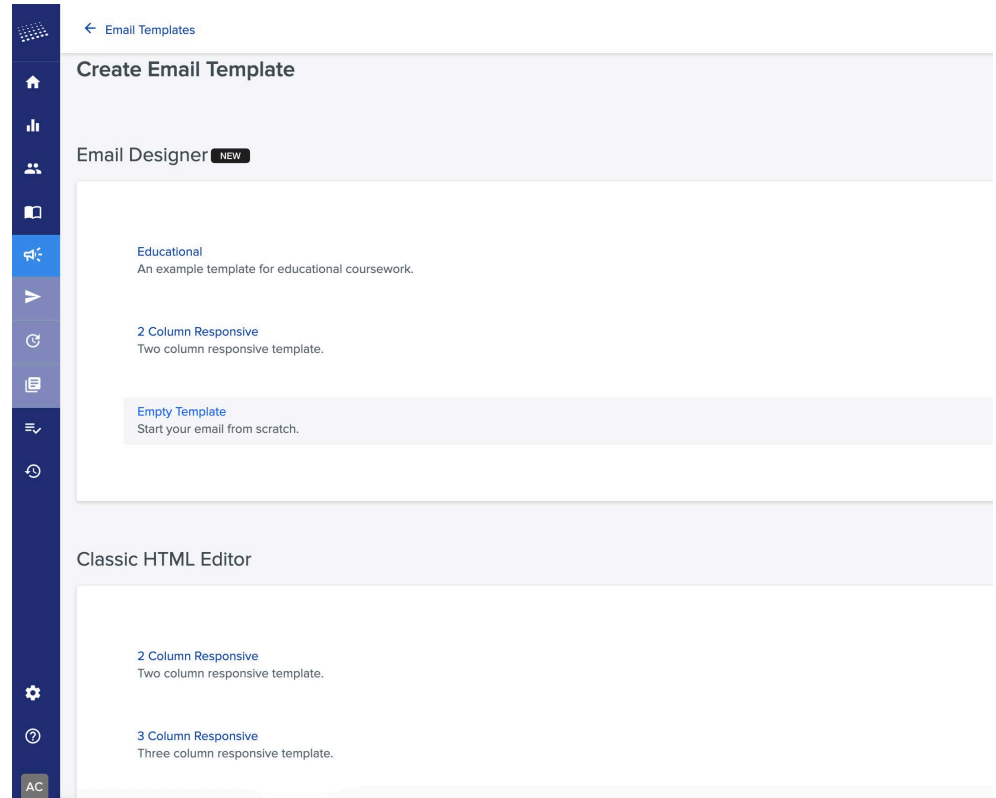
CSU Transfer Success Pathways copy

Subject

Discover a new path to the CSU from a California Community College

Building Email Templates

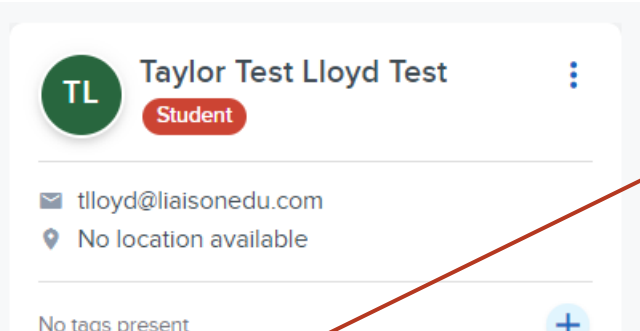
- You can also create email templates without copying an existing one.
 - Marketing
 - Templates
 - (+) 
- Can choose from classic HTML editor or new template builder (email designer)
- Email designer contains 2 template structures and a blank version





Communicating with Students

From the Student Summary



TL Taylor Test Lloyd Test
Student

tlloyd@liaisonedu.com
No location available

No tags present

On the contact summary screen, select the message icon



← New Email Message to Taylor Test Lloyd Test

SELECT TEMPLATE

Search...

Name	Subject	Design
CSU Transfer Success Pathways	Discover a new path to the CSU from a C...	CSU Transfer Success Pathways
Let our CCC Counselors help you apply to ...	Let our CCC Counselors help you apply t...	Let our CCC Counselors help you apply t...
Meet with one of our California Community...	Meet with one of our California Communi...	Meet with one of our California Communi...
Request an appointment with a CCC coun...	Request an appointment with a CCC cou...	Request an appointment with a CCC cou...
What is the CSU Transfer Planner?	What is the CSU Transfer Planner?	What is the CSU Transfer Planner?

« Prev 1 - 5 of 5 Next »

Select an existing email template to send

Note: you can modify the email template prior to sending it!

Bulk: From Contact Grid

1. Navigate to **Contacts**
2. Filter students as needed
3. Select students
4. **Message**

The screenshot displays the 'outcomes' application interface. The sidebar on the left contains navigation options: My Dashboard, Reporting, **Contacts** (highlighted with a red circle and '1'), Marketing, Tasks, Activity, Settings, Help, and Taylor Lloyd. The main content area shows the 'Contacts / Students / All (81)' grid. The grid has columns for Name, ADT Program 1, and Transfereble GPA. A message above the grid states 'You've selected 20 contacts. Select all 81'. The grid lists 20 contacts, each with a checked selection box. The bottom toolbar includes buttons for Message (highlighted with a red circle and '4'), Comment, Update Data, Add Tag, Export, and Delete. A 'Filter Students' panel on the right has an 'Add Criteria' button (highlighted with a red circle and '2').

<input checked="" type="checkbox"/>	Name	ADT Program 1	Transfereble GPA
<input checked="" type="checkbox"/>	John Abbatico	jabbatico@gmail.com	Physics
<input checked="" type="checkbox"/>	I Gusti Ngurah Adhi Baskara Putra	baskara.ngurah@newfireglobal.com	Geology
<input checked="" type="checkbox"/>	Alok Balakrishnan	testing554408@mailinator.com	Biology
<input checked="" type="checkbox"/>	Alok Balakrishnan	testing1224455@outlook.com	
<input checked="" type="checkbox"/>	Alok Balakrishnan	testing445871@mailinator.com	
<input checked="" type="checkbox"/>	Alok Balakrishnan	testing445584@mailinator.com	
<input checked="" type="checkbox"/>	Alok Balakrishnan	testing88554@mailinator.com	2.79
<input checked="" type="checkbox"/>	Alok Balakrishnan	testing34555@mailinator.com	Business Administration
<input checked="" type="checkbox"/>	Alok Balakrishnan	testing22178@mailinator.com	Biology
<input checked="" type="checkbox"/>	Nikira Boerger	nikiraboerger@gmail.com	Elementary Teacher Education
<input checked="" type="checkbox"/>	Kevin Brooks	kb1test@	Animal Sciences

Email
many
students
at once



Resources

Resources

- [CSU Transfer Planner Community College Portal Help Center](#)
- [OneDrive Folder](#)
 - Operations Manual
 - Primary User List (from the April 9th launch)
 - Trainings
 - Meetings
- **Liaison Support Team:** Technical Assistance
 - csutransferplanneradm@liaisonedu.com
- The CSU Chancellor's Office
 - csutransferplanner@calstate.edu

**THANK
YOU**

Have a questions ?

Contact:
csutransferplanner@calstate.edu

 **LIAISON**