Scheduling Different Course-Evaluation Periods and Emails in One Project

November 9, 2022

Agenda

- Blue7 to Blue8: What changed
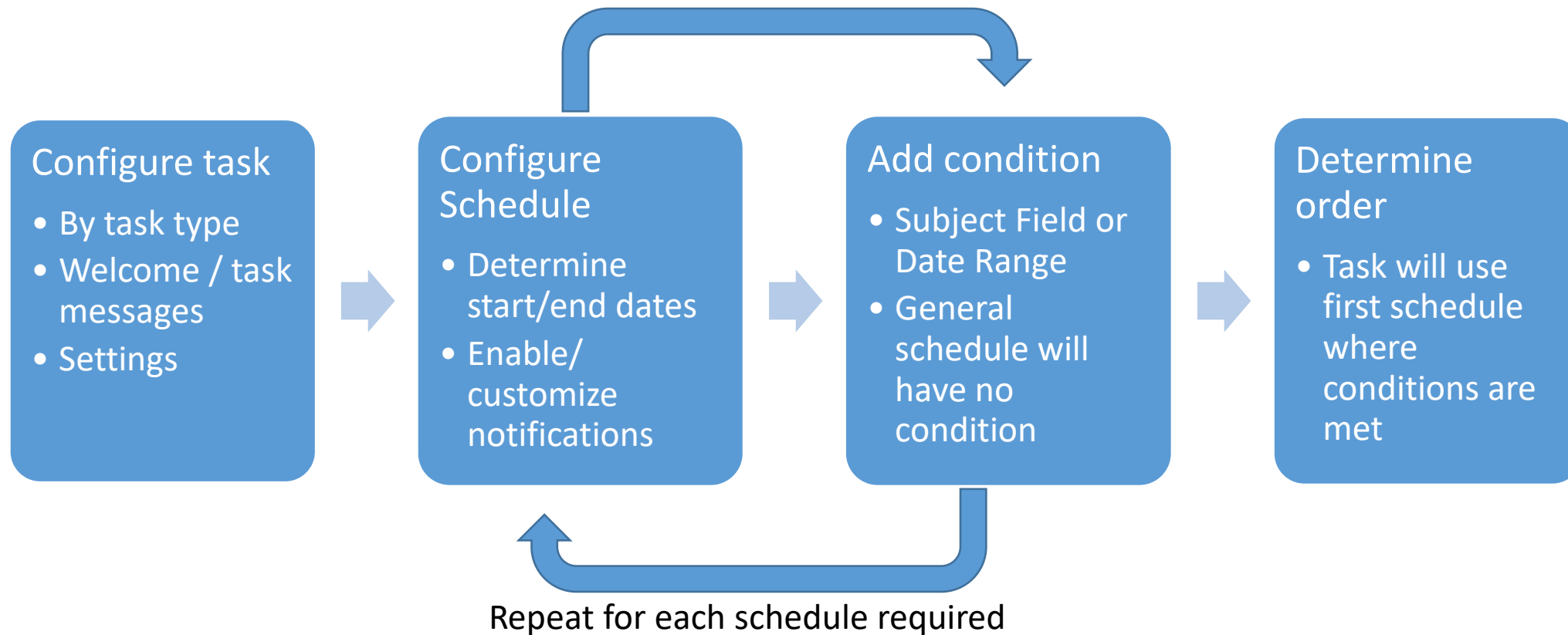- Task Scheduling Overview
- Scenarios
- Best Practices
- Q&A

The need

- Schedule tasks to run evaluations
- Capability of setting up different task dates
- Ability to communicate with users about tasks
- Customizable messaging
- Validate individual task dates

Blue 7 vs Blue 8

Need	Blue 7	Blue8
Task dates	Fixed/Relative Dates	Fixed/Relative (inc. Date Range) & Time
Scheduling logic	Condition only with Dynamic Days	Schedules based on condition: duration or subject field
Send notifications	1 invitation + 2 reminders	1 invitation + 5 reminders + completion
Customizable content	One email template	Email template per schedule
Validate individual task dates	Not easy when using dynamic days	Easily view which schedule used in Manage Project

Process of setting up a schedule

Configure task
- By task type
- Welcome / task messages
- Settings

Configure Schedule
- Determine start/end dates
- Enable/ customize notifications

Add condition
- Subject Field or Date Range
- General schedule will have no condition

Determine order
- Task will use first schedule where conditions are met

Repeat for each schedule required

How many schedules should we set up?

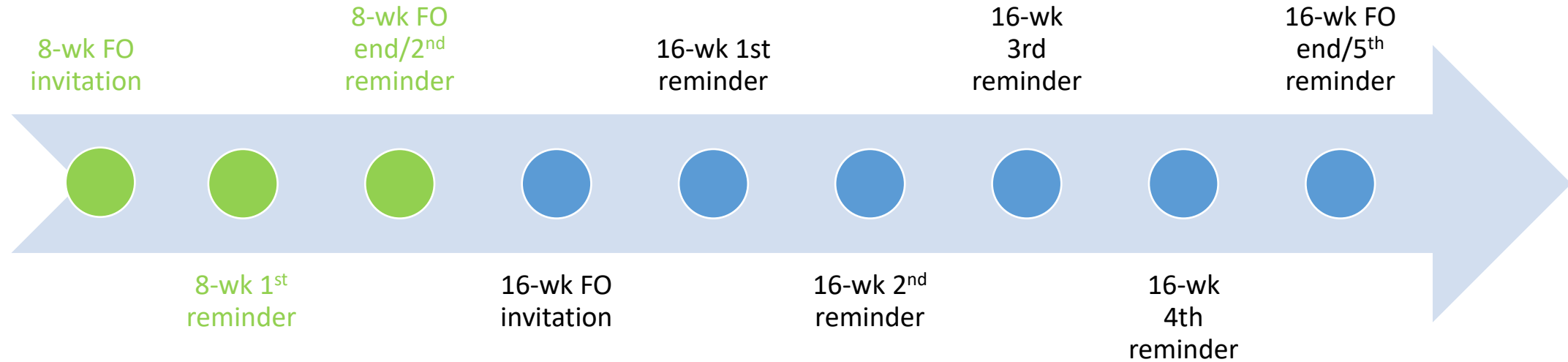|	
Task Duration	• Shorter, longer evaluation periods
Timing of tasks	• Task dates driven by subject
What's my message	• Content can be branded by schedule
User experience	• Risk of confusion : too many overlapping tasks (and emails)

Determining the "right" number

Scenario:

At the Explorance Academy, we have 2 different length courses: 8-weeks and 16-weeks

Task Duration

8-wk courses : 15 days of evaluation

16-wk courses : 30 days of evaluation

Timeline

8-wk FO invitation

8-wk FO end/2nd reminder

16-wk 1st reminder

16-wk 3rd reminder

16-wk FO end/5th reminder

8-wk 1st reminder

16-wk FO invitation

16-wk 2nd reminder

16-wk 4th reminder

2 schedules (using course duration as condition)

Block (8-wk): 15 days prior to course end, with 2 reminders

Regular (16-wk): 30 days prior to course end, with 5 reminders

Including the timing of tasks
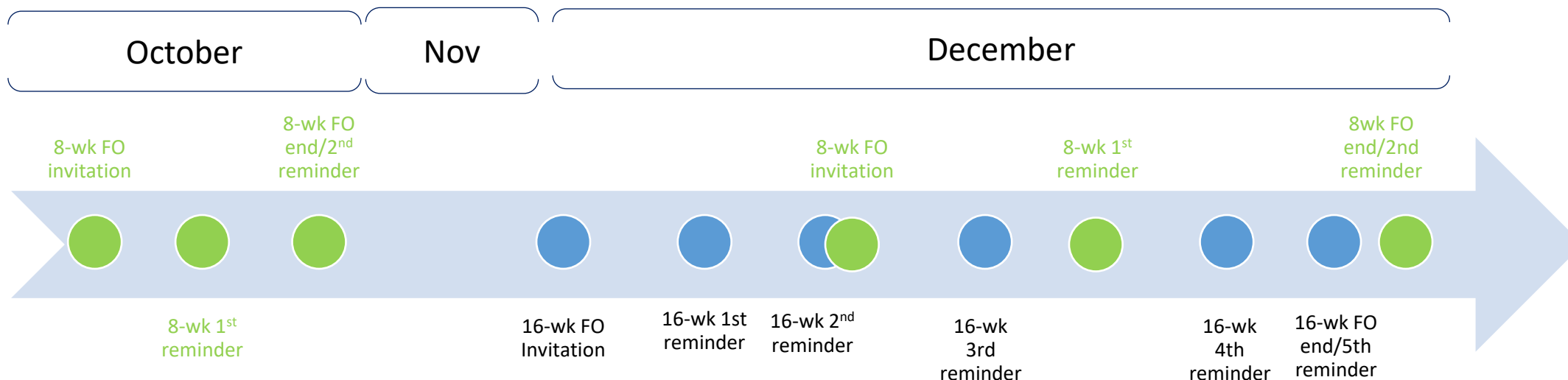
There are actually two sets of 8-wk courses:

1st block begins at start of term, 2nd block ends same day as our 16wk

Timing of tasks

Start/end dates of tasks :
- 1st block : mid-Oct to end of Oct
- 2nd block : mid-Dec to end of Dec
- 16wk: early-Dec to end of Dec

Timeline - updated

October   Nov   December

8-wk FO invitation

8-wk FO end/2nd reminder

8-wk FO invitation

8-wk 1st reminder

8wk FO end/2nd reminder

8-wk 1st reminder

16-wk FO Invitation

16-wk 1st reminder

16-wk 2nd reminder

16-wk 3rd reminder

16-wk 4th reminder

16-wk FO end/5th reminder

Clear overlap with our 2nd block and 16-wk courses

- If a student is enrolled in a 2nd block AND 16-wk course, they will receive 9 notifications in December alone!
- Email content is identical

Considering the message & user experience

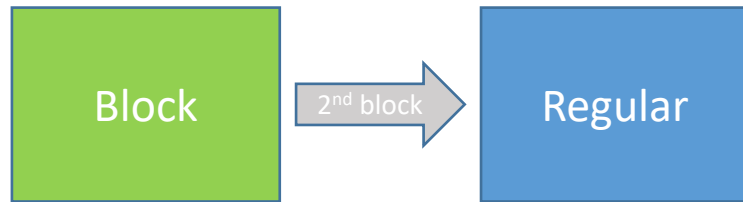Can I make my notifications more specific?

*Using piping, specific wording, subsequent email*

Am I confusing my user?

Adjust based on likely scenario

Based on our reflection...

Block →[2nd block]→ **Regular**	## Move 2ⁿᵈ block -> Regular schedule

Block →[2nd block]→ **Regular**

Move 2nd block -> Regular schedule

- Condition using date (i.e. course end <=Oct 31)
- Subsequent email for later start in of 2nd block
- Reduce # of emails (reminder not sent if task expired/completed)
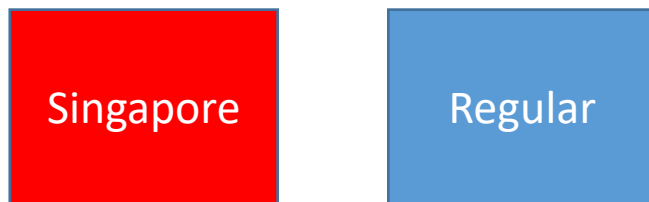
Block → **ONE MEGA schedule**
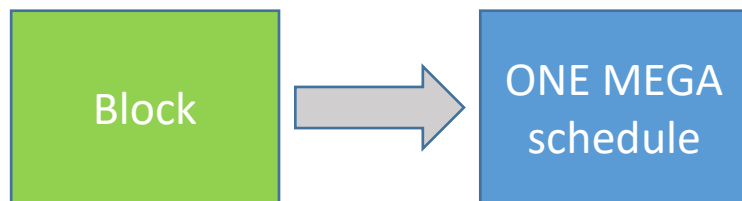
Combine all 3 in one schedule

- Start (27% of duration) & end date (course end) same for all courses
- Similar concept above for emails

Other scenarios

Block	Regular	Nursing

- Custom content:
  - 2nd block is Nursing courses
  - Separate schedule as email content will be custom

Singapore	Regular

- Different time zones:
  - Block courses are at our Singapore campus
  - Separate schedule as timing of tasks will need to be different (perhaps even content)

Best Practices

- Just because you can, doesn't necessarily mean you should

- Review evaluation needs: create a timeline to view the full picture

- Keep the user at the heart of the experience

- Communicate with users, customize notifications to avoid confusion
  - Other ways to drive response rates: QR code, LMS pop-up

Questions?