Getting Started with Automated Actions (Summer '23)

What are Automated Actions?

Workflows built on the following logic: If X, then Y.
- X = a student meets the criteria of a specific saved search
- Y = send a message (SMS or email) OR issue an alert

Sample Messaging Automations

Intake Survey Responses

email all students that say they are interested in certain resources with a message to connect (exclude initial matches)

New Assigned Students

email students with what to expect in the coming year + your PAL link (exclude initial matches)

Category-Based

email all first-generation students with a welcome message

Sample Alert Automations

Summer Melt

issue an alert on any students that have 0 enrolled credits in the upcoming term (exclude initial matches)

FAFSA Completion

Issue an alert for students with a category "FA info needed" coming from the SIS

Missed Success Markers

Issue an alert for any student who has missed success markers

Key Considerations

Always begin with your "If...Then..." Statement.

Start with small workflows with a big impact: look for simple, repetitive business processes that occur in summer and are executed by a small group of staff.

Track permissions closely: automations can only be viewed on an individual user's saved lists & searches page.

Understand the logic for your search parameters and check the email confirmation every time (put a hold on your calendar to make sure you are available).

Consider excluding initial matches carefully: in many cases it will make sense to exclude initial matches.

Define Success from the outset: how will you measure time saved, output, frequency of errors, or another KPI?

Next Steps

Month 1
Test an automated workflow, plan a small pilot

Month 2
Execute your pilot automated workflow

Month 3
Evaluate & iterate on use of automations

For an up-to-date list of FAQs, please visit the Automated Actions article in the Help Center.

Please direct any unanswered questions to NavigateTechSupport@eab.com.