Ocelot Texting Campaign Guide

Overview:

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        c.   Tags?
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        e.   Provision a phone number for the outgoing text message if you have admin access
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    IV.   Launch the campaign

I.   Create a Contact List

The contact list that you will upload to Ocelot needs to be a CSV file. You can create these contact lists from any of the three sources below.

    a.   From Starfish (ask Dan if you need help on this)
    b.   From Cognos – ask your Data Coach or submit a Research Request form to the OIE (https://www.bakersfieldcollege.edu/oie/research-request-form)
    c.   From a spreadsheet you have created.

* The only field that is required in these CSV files is a cell phone number field, but it is good to add a first name field and a last name field. Before you upload the CSV file, you may want to remove unnecessary fields, like an address field, or a home phone number field.

If your contact list is in an Excel file, do a Save As and convert the Excel file to a CSV file. Then save that file to a location that you will remember.

II. Upload the CSV file to Ocelot.

1.   Log in to Ocelot and click on the "Hamburger" menu ( ) in the top left part of the screen.
2.   Click on **Contact Management** and then **Contact Lists**.
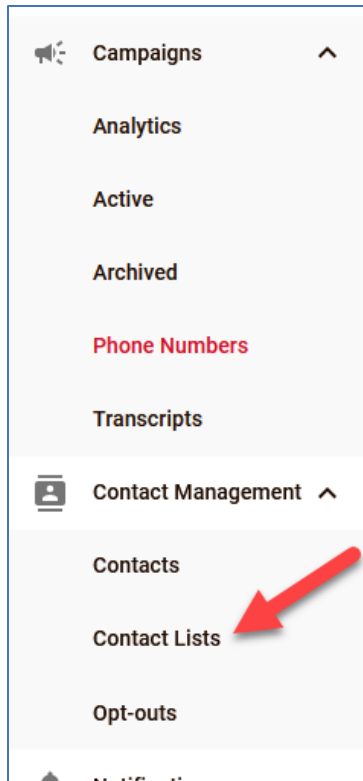
3. Click on the plus sign on the bottom right side of the screen.
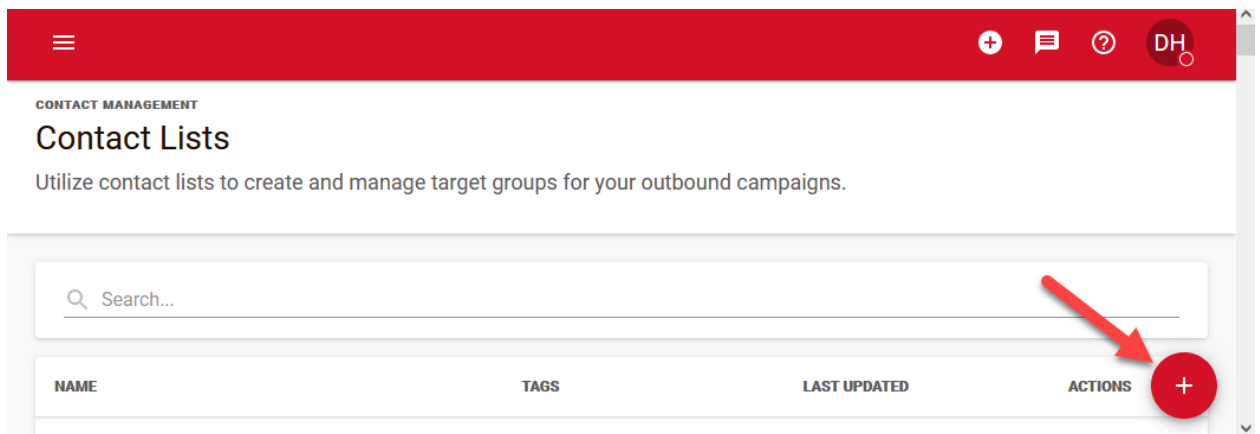
4. Assign the Columns (the names of the fields). It will start off looking something like this.

Click inside each empty box to add a field name. You can select any of the four options, or you can add your own field name by typing the field name in the box. Hit **Enter**, or click on **Add "____"**. Click on **Add Field** at the prompt.

4. Turn off the **Header Row**, add the field names, and then click on **Next**.

5.   Give the list a unique name and add any tags if desired. Then click on **Create Contact List**.

III.   Create the Campaign

1. Click on the **Plus** at the top right of the screen.

2. Select the "**Create Campaign**" option.

3. You will be given three choices for creating your campaign. In most cases, you will likely choose the "**From Scratch**" option.

4. Find the Contact List you just uploaded to Ocelot and click on the **Plus sign** to the right of the list. The list of contact lists will be long, so you can find your contact list easily by searching for key terms.

5. Give the campaign a title that is easily distinguishable from other campaigns.
6. Your "**Campus & Office**" will be "**Guided Pathways**".

7. Compose your message. The message should have four components:
   a. Greet the student by name
   b. Tell the student who is sending them a text. You can keep it general, as in, "This is BC Performing Arts department."
   c. Add a concise message containing the pertinent information you wish to convey.
   d. Let the students know what to do if they would like more information or if they have questions.
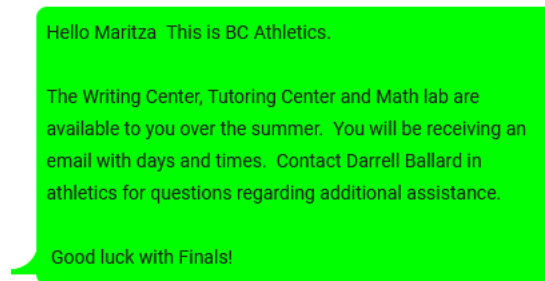
Content

Message

There is a 1600 character limit, but generally keep your messages much shorter than that. The longer the message is, the longer it will take to send out the message to your students.

8. If you have an Admin Ocelot Campaign account, you will next be able to Provision a phone number that will be associated with the text message you send to students. Enter the "661" area code and select a phone number to use.

Provision Phone Number

Area Code

661

(661) 689-5823

(661) 727-7811

(661) 727-7098

(661) 689-5766

CANCEL   PROVISION NUMBER

If you do not have an admin account, **save** your campaign and ask your Department Chair, Dean, or Education Advisor to review the campaign you set up and then let them know when you would like to have the campaign launched.

9. **Save** the campaign.

10. Students may reply to these text messages, and you need to decide who, or what, should respond to the students' replies. Once you **Save** the campaign, you will be able to choose whether the bot should respond to the students, or whether you, or another BC staff person, will respond to the students' replies. In the "**Campaign Type**" field, choose **Bot** for the bot to respond to the students' replies, or **Agent** for a BC staff person to respond. Also, in the IDK (**I Do**n't **K**now) Type, choose either Default for the Bot to give general contact information to the students, or choose Agent for a human to respond to the questions that the Renegadebot is not able to answer.

IV.   Launch the Campaign

The campaign is now ready to be launched. Try not to launch the campaigns too early in the day. You can decide what is "too early" for our students. Also, if you have a lengthy text message, and/or you are sending your message to thousands of students, your message will take several hours to reach all of the students on your list. For that reason, be careful not to launch your message too late in the day.

If you need help, or if you have any questions, please contact Dan Hall at
Daniel.hall@bakersfieldcollege.edu.