GEAR UP Cadence Training Manual

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*All starred items are the same trainings for
both Cadence Users and Admin

Introduction to this Training Manual

This training manual will take you through how to best use Cadence to reach the GEAR UP students and parents. Throughout this manual, we will be linking you to the Cadence New User Guide. Please see the full guide if you'd like to explore any topic more in depth. We also suggest going through the whole tour that Cadence gives to each user when they login for the first time.

If you are still unsure of how to use a feature, please see Cadence's knowledge database where you can find FAQ's.

Or you can send an email to our Client Success contact, Juliet Pacer juliet@mongooseresearch.com. She is an awesome resource and would love to help if you have any questions that you can't find answers to.

• User Guide •

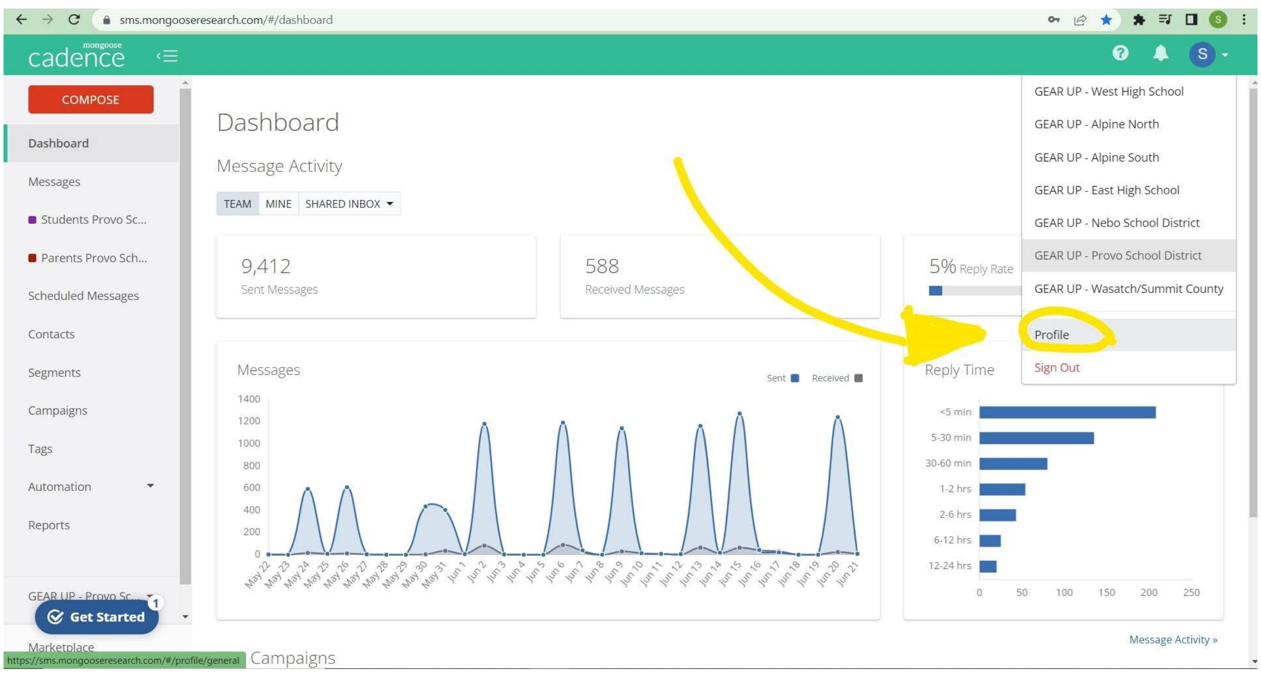
Intro to Inbox & Cadence

Dashboard: As soon as you get into Cadence, you'll see your dashboard. The dashboard is where you can see quick analytics. You can also easily toggle between the team's inbox or specific inboxes (if your region has multiple) and time periods (one month, one week, or one day). This is helpful to see how responsive students/parents have been to your messages.

Inbox: The inbox is where you'll be able to see sent/archived messages, reply, add tags, and turn on auto-replies. Please watch this video to get a little tutorial of the inbox. You can also click "Show quick tips" whenever you see it to learn a little more about the system. https://www.mongooseresearch.com/cadence-new-user-guide#inbox

Profile/Settings: To change notification settings, add a forwarding number (in case a student/parent calls the number), and more settings, go to profile. See below figure.

Other: Please explore the other tabs along the left side to see what they are. You can use tags for individual messages help, or you can tag important information). Segments, campaigns andthe automation options are also very helpful. There is a more information about those in a few pages.



9 Best Practices for Texting Students

Taken from: https://www.mongooseresearch.com/blog/student-success/best-practices-for-texting-students

If there's one thing to take away from this blog, it's this: Before you hit send, ask yourself, **"Is this valuable information for students?"**
While texting is a powerful way to engage prospective and current college students, there are right and wrong ways to do it.
Here are some tips for effective SMS texting at
GEAR UP.

1. Obtain Consent

Texting is an incredibly valuable medium for GEAR UP in their goal of helping students. But it is vital that you not burn the medium by spamming students with unwanted messages.

We recommend gaining consent from students and parents, and being transparent about the kinds of messages your school wishes to send, as well as the frequency in which you plan to send texts.

Carriers are very sensitive to high spam and opt-out rates through third-party texting platforms (including all higher ed texting solutions and CRMs), so be sure to follow best practices to ensure compliance and prevent opt-outs, or worse, having your numbers blocked.

2. Store Texting Preferences

You'll need the following data fields populated and on record:

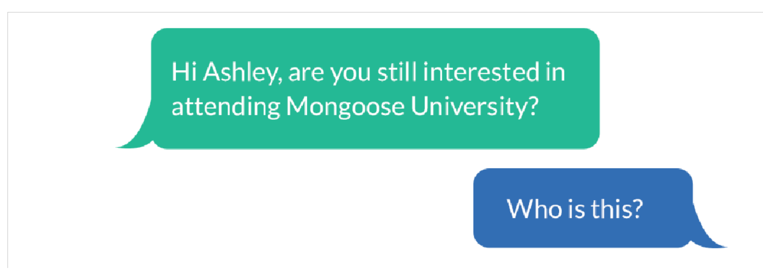
- Student name
- Mobile number
- Opt-in status
- Date/time that the opt-in status was last updated*

**Consent needs to be re-established if a reasonable time (10-12 months) has passed without any messages being sent.*

You should also keep a record anytime a student chooses to opt-out which can include texting a keyword like "STOP."

3. Identify Yourself

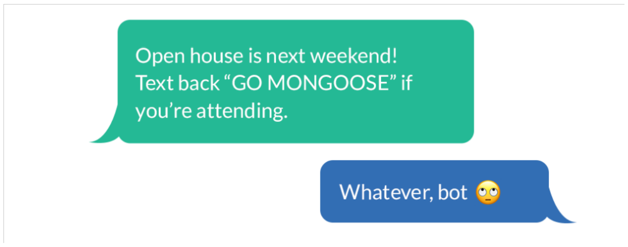
Because your text will display as an unknown sender, you should identify yourself as a human and establish a rapport with students. A student is much more likely to engage with a person than a message.



If it's an initial message, include opt-out instructions. For example: "Reply STOP to unsubscribe".

4. Address Students Directly

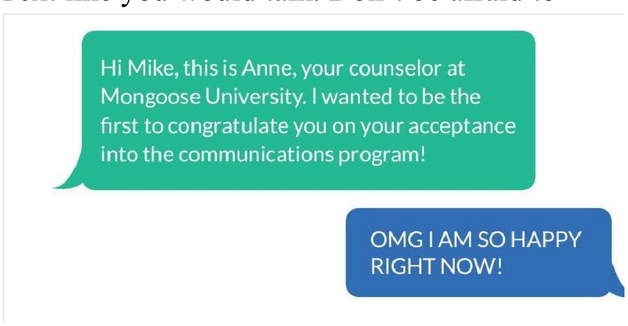
When you address students directly, you show that they are not just another number in a large group. Using a student's name also eliminates confusion and shows that your text is indeed intended for them.



5. Strike the Right Tone

If you come across as too personal or lackadaisical, it can confuse someone and make it difficult to build trust. On the same hand, a formal, stoic tone can be very off-putting and unfriendly. Be professional, but human with your messages.

Text like you would talk. Don't be afraid to

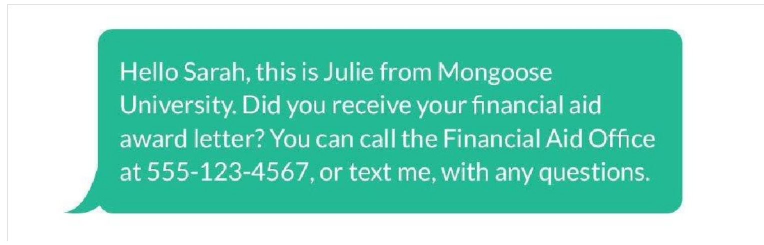


use emotion, especially if you're sharing good news. Be personal, concise, and relevant so the student knows they're dealing with a human being. The key is to add personal touch without invading a student's personal space.

6. Ask Questions That Prompt Action

Students want information, and the best way to increase engagement is to ensure that they're getting as much as possible.

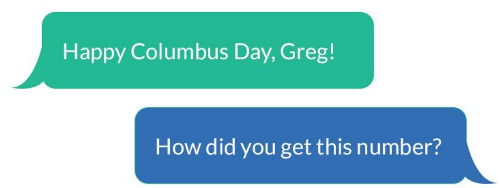
If you're texting an event reminder, ask if they plan to attend. If you're sending along an invitation to an open house, ask if they know where to park. Make yourself available to them and build a rapport.



7. Have a Goal and a Focus

Texting is personal. While 80% of students want to receive texts from colleges, they do not want what they perceive as spam. (Hint: if they don't want the message, it's spam.)

Avoid holiday greetings and focus on important information that is helpful to students. Don't give them a reason to ignore



8. Be Ready to Respond

your next text. Get your department involved in the strategy to ensure buy-in across the board.

Segmenting your audiences will also reduce unnecessary texts for students the messages don't pertain to.

You've developed a plan to build trust with your students, the last thing you want to do is to violate that trust by disappearing.

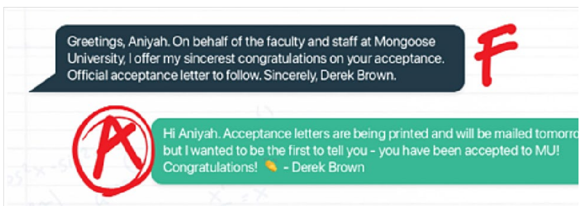
If you've sent a text that asks if they want more information and they reply with a question, you'll damage your credibility by not getting back to them in a prompt manner.

9. Have Fun – Show Your Excitement!

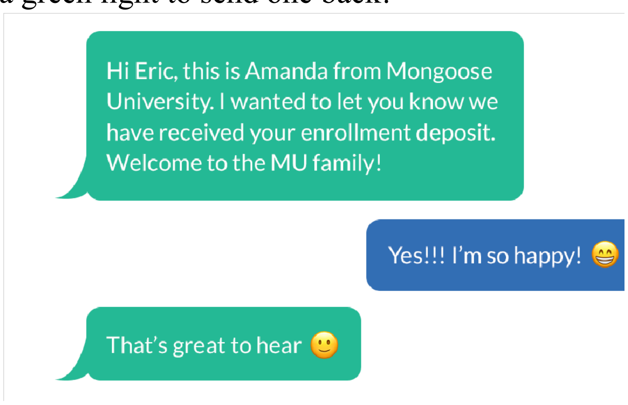
This is an important, liberating time in your students' lives and you get to be a part of it!

Don't be afraid to show emotion if the situation calls for it.

FOR EXAMPLE:



If a student shares an emoji with you, that's a green light to send one back!



Ultimately, you should enjoy being a part of your students' education. Before you hit send on a text, always ask yourself these three questions:

1. Do I have consent to text this student?
2. Is this information valuable?
3. Is this topic relevant?

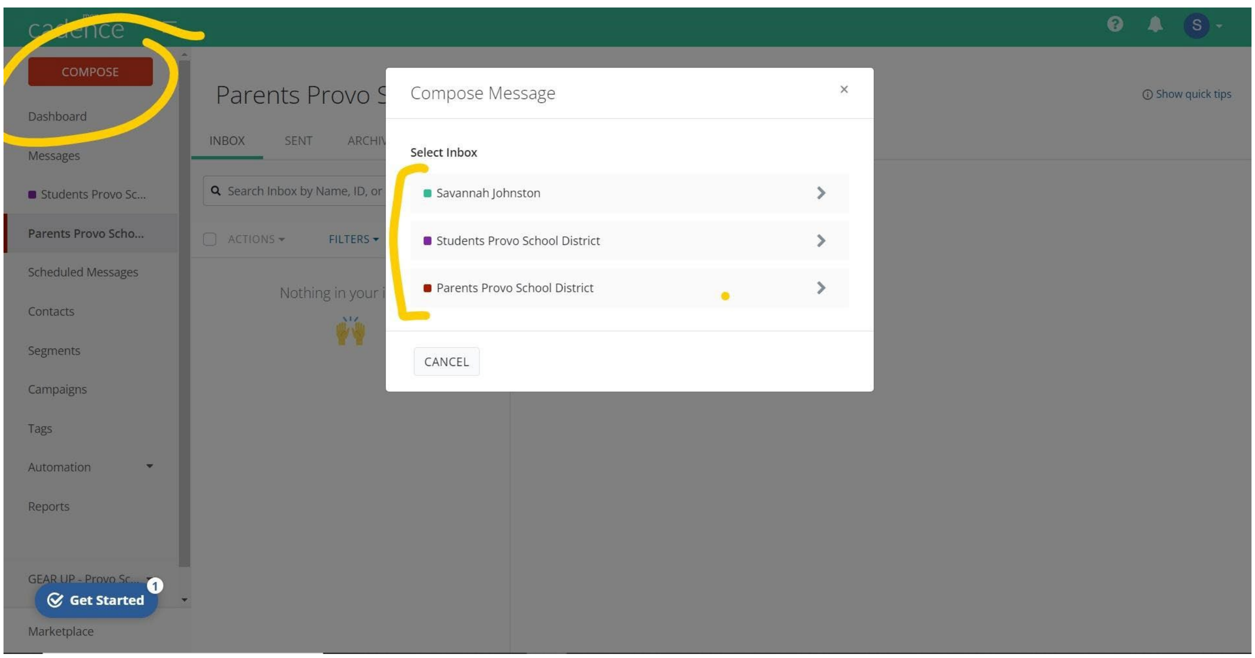
For more info on how to improve communication, see Mongoose's blog where they post many helpful tips that will help you communicate with the students.

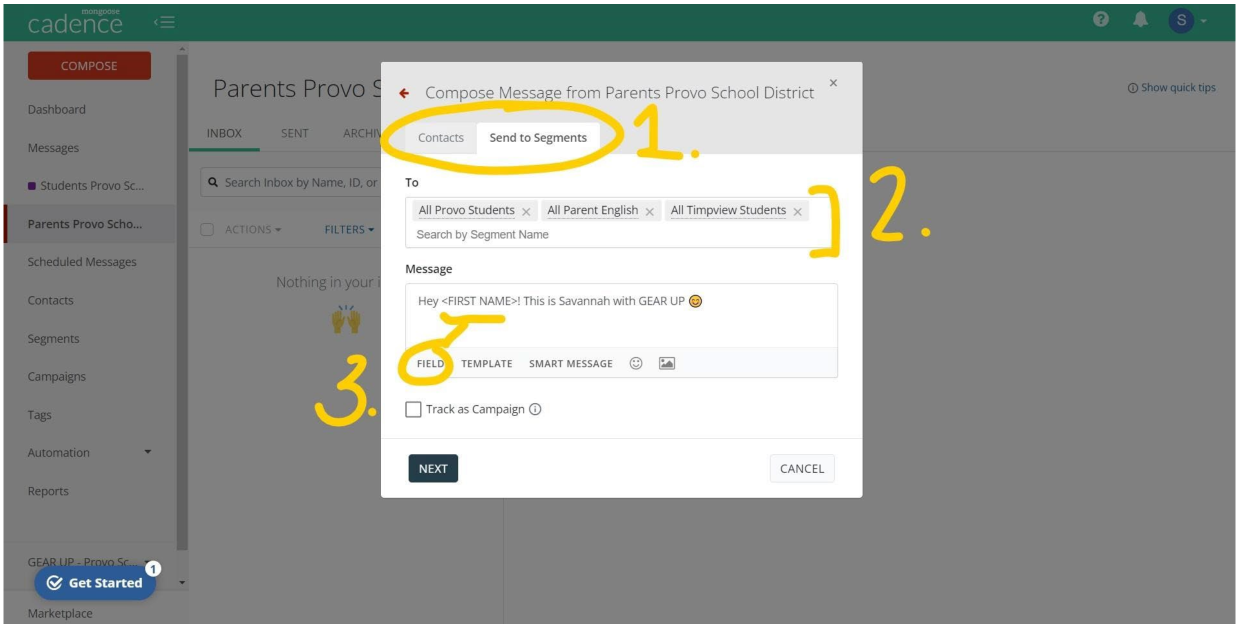
https://www.mongooseresearch.com/cadence-campus

Sending Messages

As a user, sending and receiving messages should be what you're most concerned about! Good thing it's nice and simple. You barely read the above "Best Practices", keep those in mind as you're communicating with the students.

Simply click "Compose" in the far top left corner. Then you'll choose which inbox to use (depending on who you're planning on sending messages to).





After that, you'll be able to send a message.

1. You can choose whether to send a message to a few specific contacts (left tab). Or you can choose to send to segments (groups of contacts).
2. Here is where we type in names or segment names. As you can see, this message is going out to the segments that contain all students from Provo High School, all parents that speak English, and all the students from Timpview High School. To create new segments/groups, you'll have to create those before trying to send a message.
3. The message box comes with a lot of options. If you click on **"Field"**, Cadence will fill that field in with the contact's information when it sends it out. In this example, we've chosen <FIRST NAME>. This means that when the message goes out, it will replace FIRST NAME with the student or parent's first name. This is an awesome and easy way to make messages personalized.

Keep in mind that you can also use/make a template message, send out a smart message (a message that triggers automatic replies if a student replies with a trigger word), add emojis, attach a picture, and track the sent messages in a certain campaign.

After clicking "Next", you'll get to preview the message and choose if you want to schedule it or send it immediately.

Segments

Segments are groups of contacts. Please see the below video to learn more about what they are and how to make one.

https://www.mongooseresearch.com/cadence-new-user-guide#segments

Segments are *huge time savers* after they are created. They also help you avoid spamming students with messages that have nothing to do with them. The **"Auto-update"** ones will automatically add users that meet the specifications you listed when you created the segment. Most regions have "Auto-update" segments for all parents that speak English or all parents that speak Spanish. They also have auto-update segments for each grade at a school.

Static segments are groups of contacts that you manually create. You have to choose each person that goes in it. These segments will need to be continuously updated with new students you want in that group. You might use static segments for all the parents of a certain grade at a certain school. You might also use static segments for certain groups: students and parents that RSVPed for a specific event that you want to send information about a few times, students going on a GEAR UP field trip, students that have expressed specific interest in updates about something (scholarship updates, announcements, etc), etc. There are a lot of possibilities. However, these segments could also possibly be auto-update segments if you used tags to track these groups because these segments can also be created with contacts that have a tag!

Campaigns

Watch the following video to learn more about campaigns.

https://www.mongooseresearch.com/cadence-new-user-guide#campaigns

Campaigns are most helpful when you want to track the response rate and other analytic information for a certain message or group of messages that you send out.

Tags

The purpose of tags is to help identify messages that need future follow up, continual tracking, a task that needs to be completed, retargeting, future segments, etc.

A few examples of tag uses:

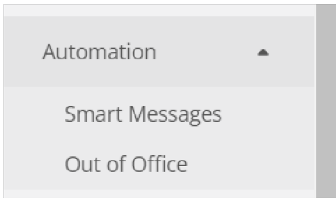
- Students that need their phone number updated
- Students that RSVPed to an event and you want to make a segment later
- Students that have *not* confirmed something

If you'd like to learn even more about tags, please watch the following video:

https://www.mongooseresearch.com/cadence-new-user-guide#campaigns

Using Automation

The automation tab is found on the left. Under it, there are options for Smart Messages and Out of Office messages.



Smart Messages are messages that when replied to with certain words, will automatically send a response. For example, if you ask

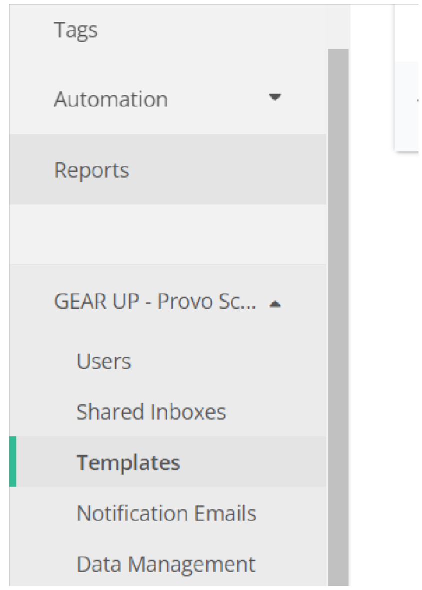
"Hey <student names>! We are having a GEAR UP lunch next Wednesday to introduce you to our program. The food is free! Let me know if you're interested by replying yes and I'll send you more information."

The trigger word would be "yes" and you could have an automatic message respond back to all students that responded yes giving them the details of the lunch.

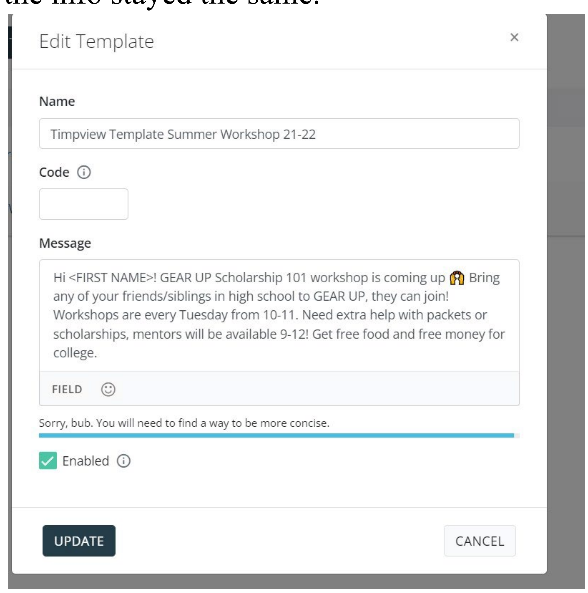
Out of Office messages will send an automatic response to all students or parents that text into your *personal inbox* (not shared inboxes) saying that you're not available (or really whatever you want it to say since it's customizable).

Another thing that will help with automation are **Templates**. Note that these can be used by all users, but only created by admins. Please ask your admin if you have an idea for a useful template.

Templates are easy to create and make it so that if you are sending similar announcements a lot, you don't have to type the same information up a lot. Admins would go to the bottom most option on the bar on the left and click the drop down menu. From there, you will see "Templates".



Here is an example of a template done in the Provo Region. With each workshop that was held, the name of the workshop in the first sentence would be swapped out. The rest of the info stayed the same.



*Note: If the **Template** option is not available, that means there are no templates created and enabled for your team.*

Measuring Results

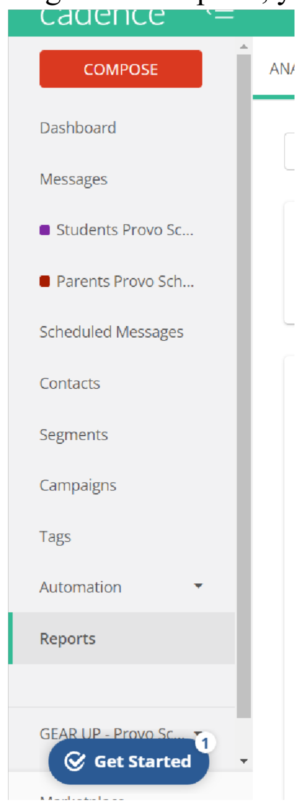
Reports. There are a lot of different types of reports. The options include:

- Unread messages: Export unread text messages for an inbox or a *user. This can be done for any inbox that you have user or admin access for.
- Campaign Reports: Export text message analytic data (how many sent, delivery rate, reply rate, etc.) for all texts within a specific campaign.
- *Message Activity: Export text messages for record keeping, external reporting, or to review individual message content.
- *Undelivered Messages: Export a log of undelivered text messages in order to review and troubleshoot deliverability issues.
- *High Speed Message Activity: Export text messages sent/received by high speed inboxes for record keeping, external reporting, or to review individual message content (This would specifically be for the shared inboxes).
- *Contact Records: Export a set of contact data for a full view of what data and contacts currently exist in Cadence.
- *Opt-Out History: Export a log of all keyword or user-triggered opt-out status changes that have occurred in Cadence.

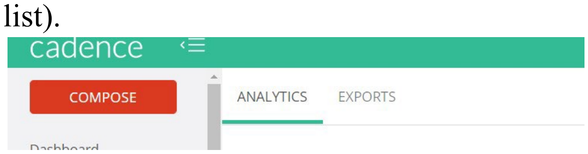
*admin only. Ask your admin for this report.

All of these reports are very helpful in analyzing what is working for GEAR UP and what isn't. Use them fairly often!

To get to the reports, you'll have to navigate



to the bottom of the column on the left hand side. From there you'll find analytics and exports. The export tab is only for admins. Please ask your admin if you need a report in the export tab (starred reports in previous list).



You can find the Unread Message and Campaign reports in the *Analytics* tab. The others will be found in the *Exports* tab.

Dashboard

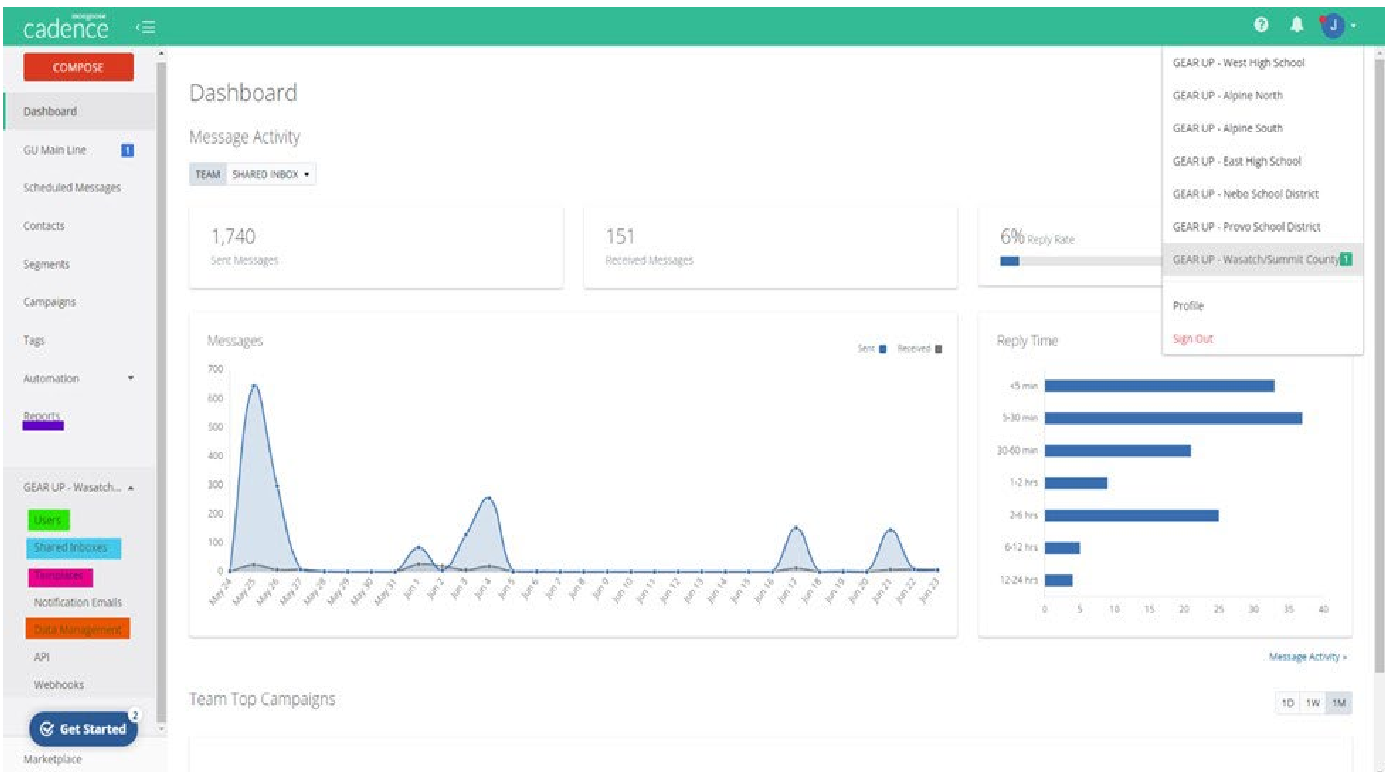
The Dashboard gives you very quick, visual, and up-to-date analytics. It's pretty easy to read with options to toggle between dates and inboxes and to see recent campaigns. The Dashboard also links you back to the reports page where you have access to all other reports.

• Admin Guide •

Admin Introduction

The Primary jobs of an admin are importing contacts, adding users, creating shared inboxes, and you will have access to in-depth reporting as well as templates.

Within this dashboard, an admin can select the proper school district then navigate by going into the different tabs. The highlighted tabs coordinate with the different tsks that an admin would perform. The following sections will show how you are able to use the different tabs available within Cadence.



Note: Be sure to watch the introduction video in the Get Started pop-up. This will be geared towards Admins.

Uploading Contacts

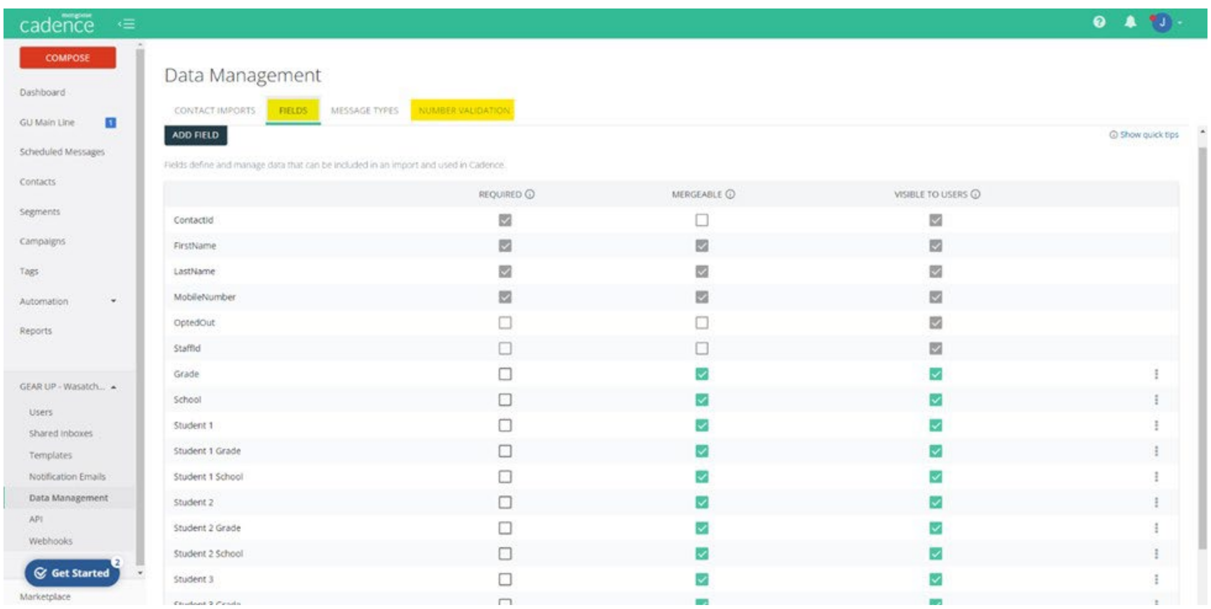
Through the *cadence parent correction* and *cadence student correction* sheets in Excel, we can upload new parent and student contacts into Cadence.

Necessary Fields

In order to bring contact data into Cadence, certain fields need to be met. Fields allow you to bring personal information about your contacts into Cadence from your system of record. Required fields include: *First Name, Last Name, Mobile Number, and StudentID/ContactID.* Many regions have other fields too. Please make sure to use the [sheets]() already created for uploading and to enter the data in the same format that it was previously entered in.

Also, as a note, mergeable fields can be used later on to merge into a text message. This can be useful for personalizing text message content and organizing contacts when creating segments. For example, if FirstName is mergeable, you will be able to write "<FirstName>" in a message and it will autofill with the contact's name (even when you send the same message to 100 people).

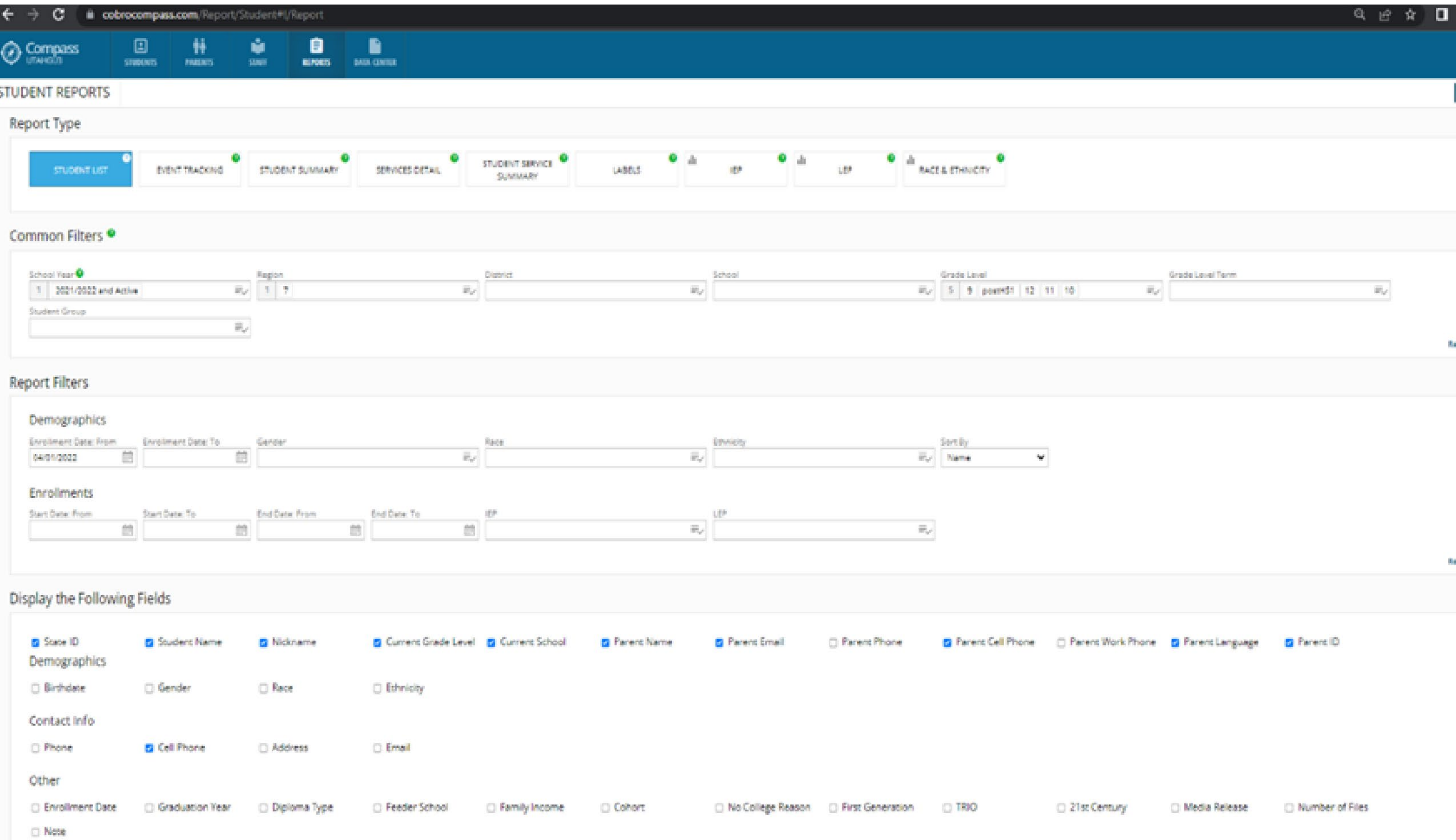
Along with selecting the required fields, admins can validate every phone number. Validating numbers is a useful tool to identify mobile numbers versus landlines. In turn this will reduce undelivered messages, improve staff efficiency, and protect from being marked as spam. After clicking on the number validation tab, you can enter the phone number(s) you have in order to validate. An email will be sent to you from Cadence with the pertinent information.



After knowing the required fields, we can find contacts to input into Cadence.

Acquiring Data From Compass

In Compass an admin can run a report to find information on applicants who need to be entered into Cadence. An admin will be able to take this information and upload the contact information for use in Cadence.

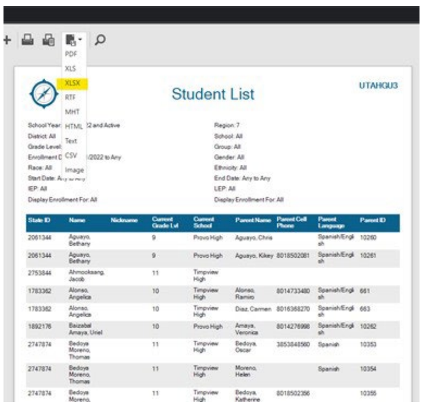


When running a report, you will need to use the common filters, report filters, and choose which of the following fields to display. The above image shows what needs to be selected and which fields are required to have.

- Common Filters: This will allow you to select the school year, region, school, and grade level. This is necessary if you are looking to pull data from specific school regions.
- Report Filters: Under demographics you need to select the “Enrollment Date: From” and the “Enrollment Date: To”. This will be helpful if you are looking for recent applicants or from within a specific time frame.
- Display the Following Fields: Before running the report make sure the following fields are selected: State ID, Student Name, Nickname, Current Grade Level, Current School, Parent Name, Parent Cell Phone, Parent ID, and Cell Phone for the student.

After going through the common filters, report filters, and selecting the display fields you are now ready to run a report. Click the report button in the top right corner of the page.

A record of the students, and their parents, who meet the requirements will be brought up. The image shows that you need to save it to an XLSX file. This will pull up the Excel spreadsheet.



The information brought up on the student list sheet is ready to be transferred to the *cadence parent correction* and *cadence student correction* excel pages.

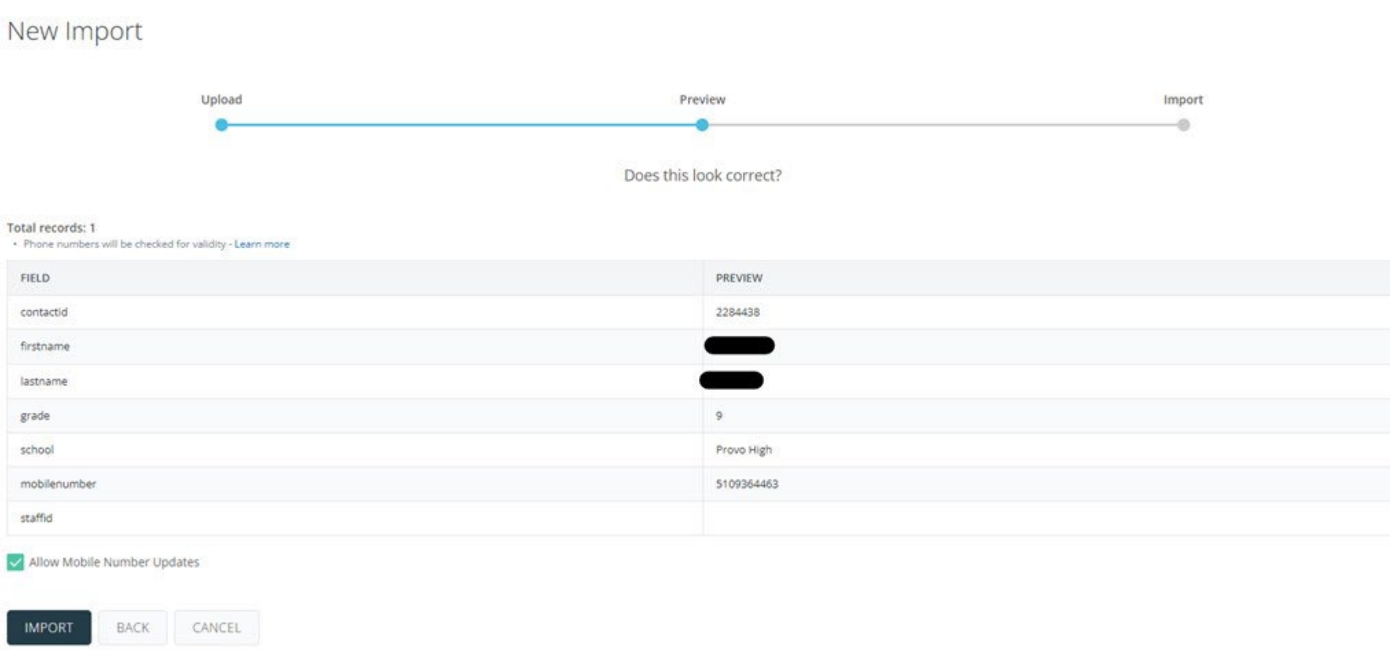
Note: Region 7 has a [different excel page](#) that is required to successfully upload contacts.

Importing Contacts From Excel

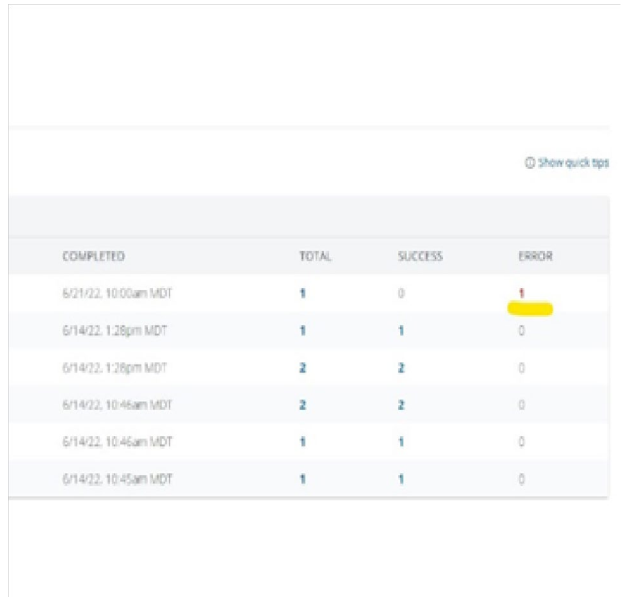
Once the Parent's and student's information is saved to their specific excel sheet, go back into the “Data Management” tab in Cadence to import the contacts and follow the below steps:

- Verify you’re in the right school district for the uploads.
- Under contact imports select new import then file upload.
- Drag & drop file in or browse to find the saved file.
- Once the file is chosen a preview will pop up.

Double check the information and click the *allow mobile number updates* box. If the fields were messed up for some reason you’ll be able to see that here. If all looks good, continue with the upload and click “Import”.



Once import is finished, you will be able to see how many were successful and how many had errors. Download the error report to troubleshoot and know which contacts couldn't upload. See below for instructions on fixing them. Once the contacts are successfully imported it is very important to update the [master sheet](#) in Teams.



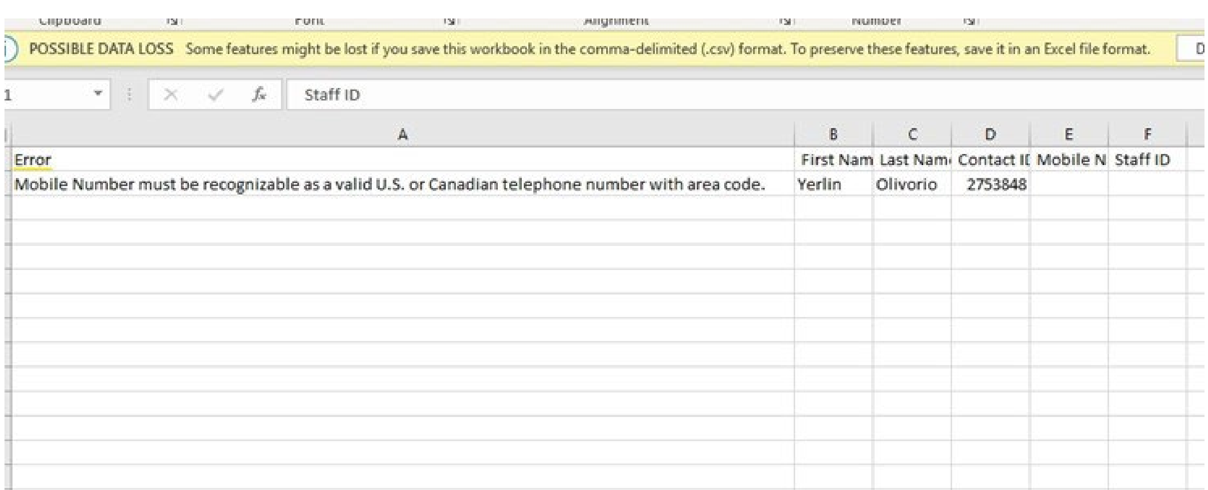
After the information is in you can find the parents and students profiles under the contacts tab. Here you can make basic edits, check text message conversations, opt-in out, block, or manually remove a contact.

How to Fix Errors

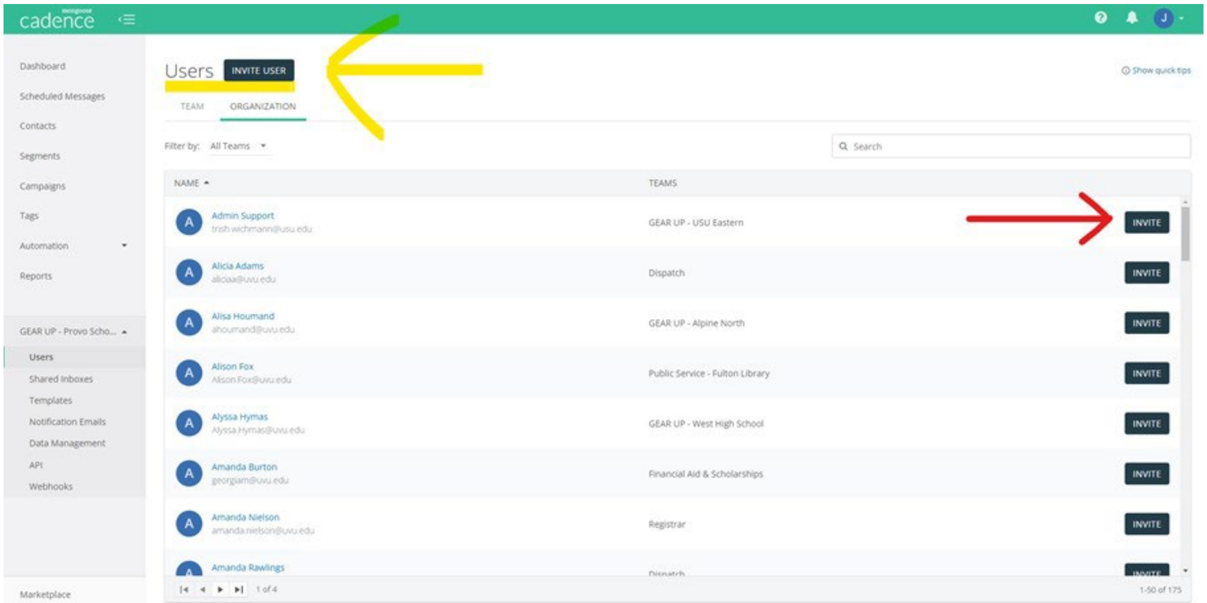
Occasionally an error will occur and show up in the import log. This must be corrected in order to have the contact imported into Cadence. When you place your cursor over the number in the error column, you'll be able to download an excel sheet with the information.

In the excel you will see the cell marked

error. This column will explain what went wrong so that you can go back and fix the original information. In this example a valid mobile number was not entered, which is a required field for Cadence. Once the error is corrected, re-import the information just like previously done.



Setting up Your Team

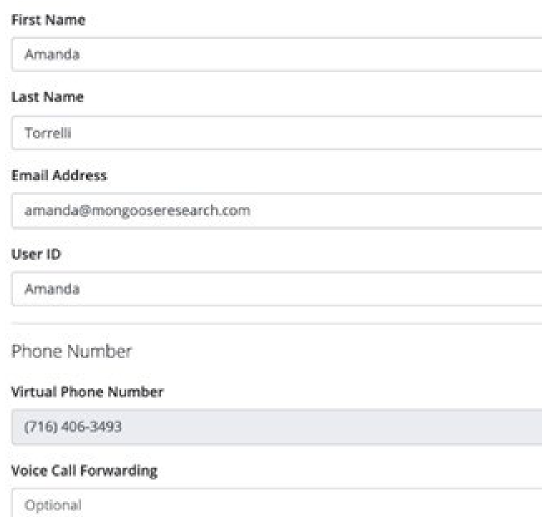


Under the *Users* tab you are able to see everyone on the team. It will also show who is an admin versus who is a user and you can filter between the two. From here you can invite new users and existing users to the team.

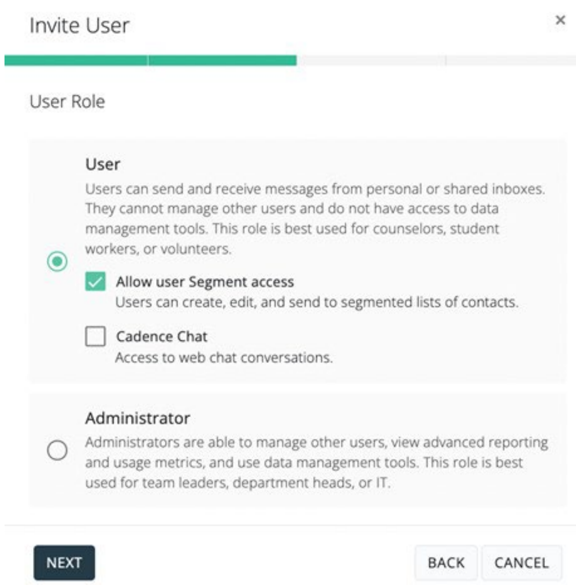
Inviting Users

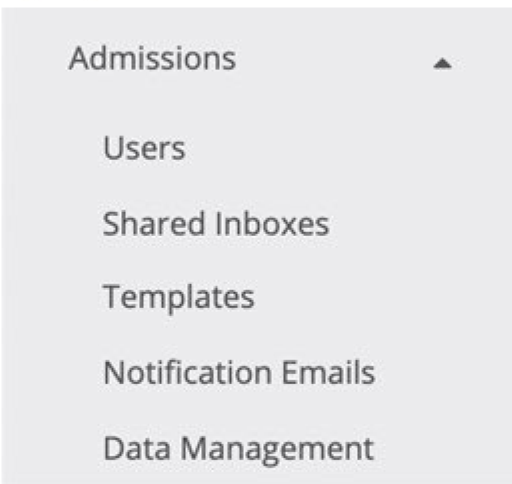
Click **[New User]** if they do not have a Cadence account or **[Invite User]** if they already have an account; then you will be able to add a new user to your team. Clicking the button will trigger a guided setup process that allows you to configure the user's basic information, access level (user or admin) and phone number options (number or numberless).

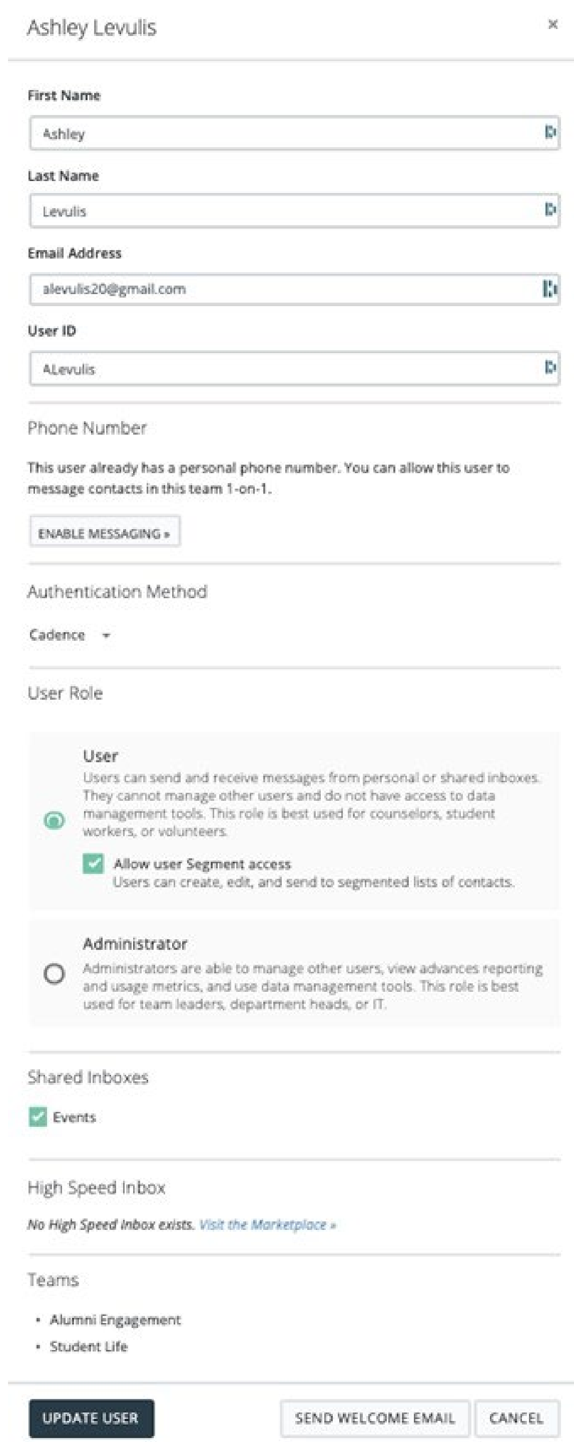
Basic information includes Email, First Name, Last Name, and UserID



When Inviting a new user you must select what access level for their specific roles.







After the role is decided a phone number will be assigned (if this option was selected) and the user will be part of the team.

Editing an Existing User

1. Navigate to the "Team Name"> Users

2. Locate the user you would like to edit, click the dots to the right of the account, and select [edit]

3. Update the details and click (Update User)

Shared Inboxes

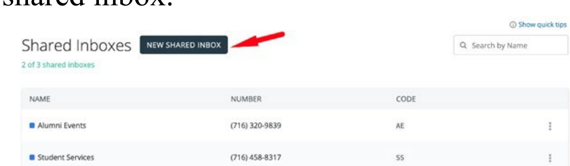
Overview

Shared Inboxes are team-specific, inboxes that multiple users can access. They are intended for a team-based approach to texting outreach. Shared inboxes allow you to reach larger groups of contacts at once more efficiently than user accounts.

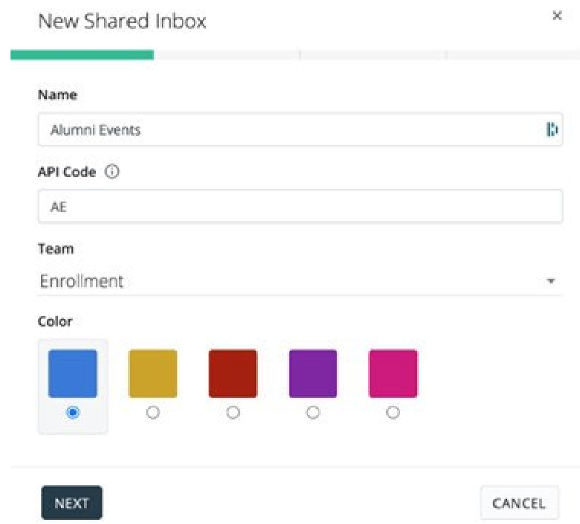
- Each shared inbox can send/receive messages
- Multiple users can have access to the same shared inbox.
- Users with access to a shared inbox can compose text messages from that account and reply to text messages received by it.
- When replying to a text within the account, the conversation will become locked for a period of time to ensure that two different users do not reply to a text at the same time.
- Shared inboxes do not utilize user assignments (click here for more information on user assignments) for sending behaviors such as Send to my assigned contacts only and Send as assigned user.

Creating a Shared Inbox

Admins are the only ones who can create a shared inbox.



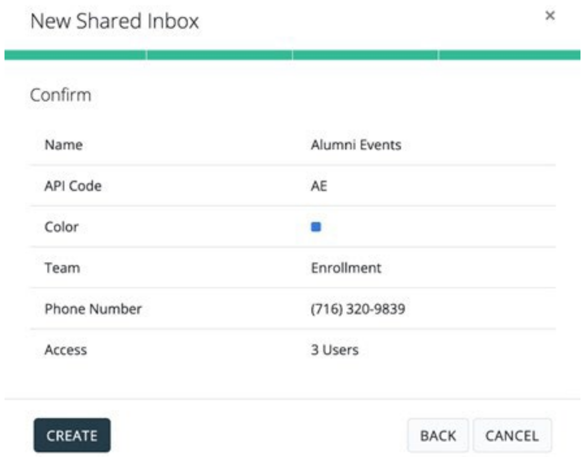
In order to create a Shared Inbox, navigate to the Shared Inboxes tab underneath the Team Name. From there click the New Shared Inbox option, and then fill in the account details.



Name allows you to identify the account and will be displayed in the navigation on the left-hand side for users that have access to the account.

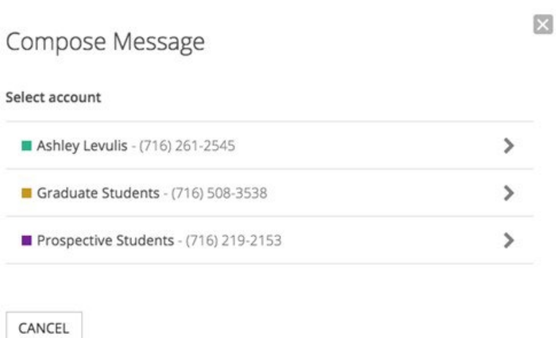
- API Code allows you to add an identifier that can be used to specify the account in API calls. Note that if you are not using an API integration, you can keep the auto-generated identifier in the field.
- Team should be set if you have access to multiple teams and you need to pick one; if you only have access to one team, the team will be pre-selected for you.
- Color allows you to specify a color to associate with the Shared Inbox. This color will only show up in the navigation for users who have access to the account.

From here select the users that should have access to the shared inbox. Access includes the ability to read all messages sent from/received by the account as well as the ability to send text messages from the account/phone number. Confirm the account details and click create to complete the setup.



Composing a Text from a Shared Inbox

When you have access to one or more shared inboxes, each time you click **Compose** a new message, you will need to select which account the text message should come from. If you select the shared inbox, the text will be sent from that account's phone number(s) and will be stored in that account's **Sent** folder.



Replying to a Text Sent to a Shared Inbox

All users with access to the shared inbox can respond to texts sent to that account. Click on the name of the Shared Inbox in the left-hand side navigation to view the **Inbox** and **Archived** organizational areas for that account.

Multiple different users can have access to a Shared Inbox, and therefore, if you click into a conversation in the Shared Inbox, it will lock the conversation for a short period of time to ensure that multiple users do not reply at the same time. The name of the user who sent/replied to a text within a Shared Inbox is noted in the conversation history.

You can also filter your Shared Inbox and Archived views by "**My Contacts**". The "My Contacts" filter will only display conversations with contacts who are assigned to you. You can additionally filter by "Read" and "Unread" conversations among your contacts. To remove the filter, click the "x".

If you are idle in a conversation that is locked for other Shared **Inbox** users, after a few minutes you will see a pop up notification asking if you are working. This is to remind you to continue in the conversation or if you are away from your computer, it will unlock the conversation so others can respond.

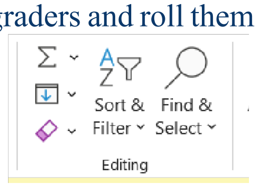
Yearly Roll-Over

At the end of each summer, the admins will have to update Cadence to reflect the roll over. The roll-over in Compass happens on August 15th, so the roll-over in Compass should be done after that date and before we start adding new students from the beginning of the year recruiting.

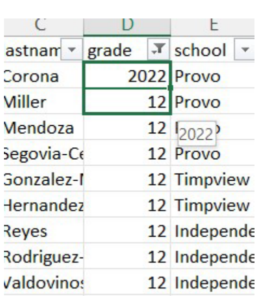
This roll-over will be done by uploading a report from Compass and creating an excel csv file to be imported. You can compare this sheet to the master sheet in Teams. As we're using these sheets, verify that they match Cadence and Compass. Throughout the year, you should have been updating a master sheet with error numbers, so ideally the master sheet should be correct and up-to-date, but it's good to double check.

Updating Student Grade- In the student master sheet, you can filter for grade.

It's very important that you start with 12th graders because we're rolling everyone up. If we start with the old 9th graders and roll them up to 10th, they will be mixed in with all previous 10th graders.



To filter, find this button on the home ribbon and select "filter". From there, the data columns should have little drop down arrows on them. Select the arrow over the grade column and select only 12. Replace the first 12 with the graduation year and then using the little green box in the bottom right of the selection, you should be able to autofill the rest of the column by dragging it down. Sort again for each grade changing the number to the next grade up (11 to 12, 10 to 11, and 9 to 10).



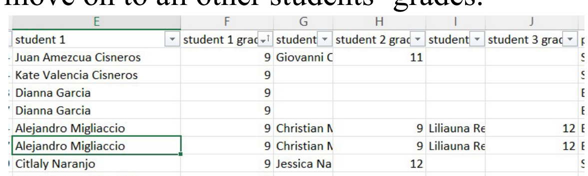
C	D	E
astnam	grade	school
Corona	2022	Provo
Miller	12	Provo
Mendoza	12	2022
Segovia-Ce	12	Provo
Gonzalez-I	12	Timpview
Hernandez	12	Timpview
Reyes	12	Independe
Rodriguez-	12	Independe
Valdovinos	12	Independe

This whole sheet will then have to be uploaded to Cadence as a new import. Number update is not necessary for this import as the grade is the only thing changing.

**Keep in mind that Provo region keeps contact info on the master sheet even if the student doesn't have a phone number or the number doesn't work. This is for record keeping purposes. Make sure to delete those records before uploading to Cadence to avoid unnecessary error messages but DO NOT delete them from the master sheet.*

Updating Parents- The process for updating the parent info is obviously a little different but still very similar.

The parent grade won't change (because it's "parent"), BUT you will have to change all grades for the students under them. Start off with changing the Student 1's grade, then move on to all other students' grades.



E	F	G	H	I	J
student 1	student 1 grad	student	student 2 grad	student	student 3 grad
Juan Amezcua Cisneros	9	Giovanni C	11		
Kate Valencia Cisneros	9				
Dianna Garcia	9				
Dianna Garcia	9				
Alejandro Migliaccio	9	Christian M	9	Liliauna Re	12
Alejandro Migliaccio	9	Christian M	9	Liliauna Re	12
Citlaly Naranjo	9	Jessica Na	12		
Kate Valencia Cisneros	9				

Again, seniors' grades will just be changed to their graduation year.

If we want to delete graduated senior's contact information in the future (or their parents), we will have to contact Cadence to do so. See the message from Cadence: "If you have a large number of contacts that need to be removed or would like all contacts to be removed from your team, our support team is happy to help with that task. Please email our support team - support@mongooseresearch.com

Segments

Segments are groups of contacts. Please see the below video to learn more about what they are and how to make one.

https://www.mongooseresearch.com/cadence-new-user-guide#segments

Segments are *huge time savers* after they are created. They also help you avoid spamming students with messages that have nothing to do with them. The **"Auto-update"** ones will automatically add users that meet the specifications you listed when you created the segment. Most regions have "Auto-update" segments for all parents that speak English or all parents that speak Spanish. They also have auto-update segments for each grade at a school.

Static segments are groups of contacts that you manually create. You have to choose each person that goes in it. These segments will need to be continuously updated with new students you want in that group. You might use static segments for all the parents of a certain grade at a certain school. You might also use static segments for certain groups: students and parents that RSVPed for a specific event that you want to send information about a few times, students going on a GEAR UP field trip, students that have expressed specific interest in updates about something (scholarship updates, announcements, etc), etc. There are a lot of possibilities. However, these segments could also possibly be auto-update segments if you used tags to track these groups because these segments can also be created with contacts that have a tag!

Only Admin users can create auto-updating criteria-based segments. If you are looking to create segments that are criteria based you can find the steps here. If you would rather create a segment from identifiers then you can find a step-by-step guide here.

Campaigns

Watch the following video to learn more about campaigns.

https://www.mongooseresearch.com/cadence-new-user-guide#campaigns

Campaigns are most helpful when you want to track the response rate and other information for a certain message or group of messages that you send out.

Information on how to create and edit campaigns can be found here.

Tags

The purpose of tags is to help identify messages that need future follow up, continual tracking, a task that needs to be completed, retargeting, future segments, etc.

A few examples of tag uses:

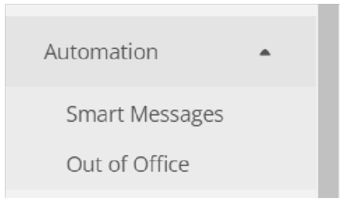
- Students that need their phone number updated
- Students that RSVPed to an event and you want to make a segment later
- Students that have *not* confirmed something

If you'd like to learn even more about tags, please watch the following video:

https://www.mongooseresearch.com/cadence-new-user-guide#campaigns

Using Automation

The automation tab is found on the left. Under it, there are options for Smart Messages and Out of Office messages.



Smart Messages are messages that when replied to with certain words, will automatically send a response. For example, if you ask

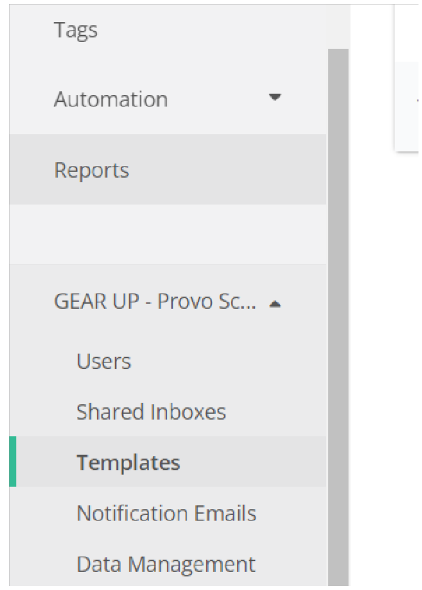
“Hey <student names>! We are having a GEAR UP lunch next Wednesday to introduce you to our program. The food is free! Let me know if you’re interested by replying yes and I’ll send you more information.”

The trigger word would be “yes” and you could have an automatic message respond back to all students that responded yes giving them the details of the lunch.

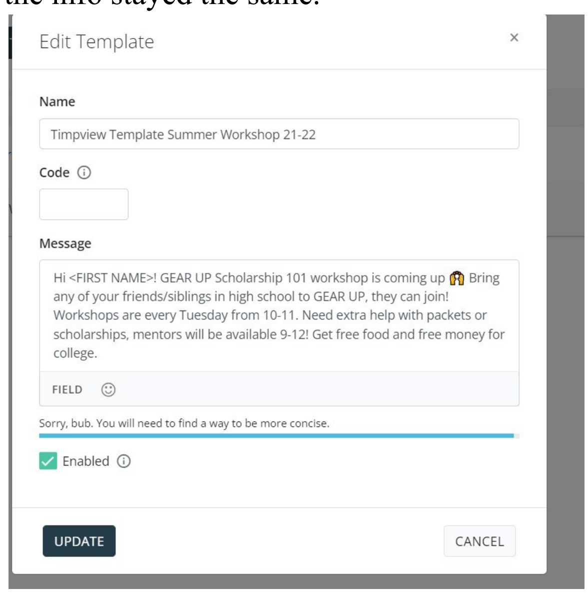
Out of Office messages will send an automatic response to all students or parents that text into your *personal inbox* (not shared inboxes) saying that you’re not available (or really whatever you want it to say since it’s customizable).

Another thing that will help with automation are **Templates**. Note that these can be used by all users, but only created by admins. Please ask your admin if you have an idea for a useful template.

Templates are easy to create and make it so that if you are sending similar announcements a lot, you don’t have to type the same information up a lot. Admins would go to the bottom most option on the bar on the left and click the drop down menu. From there, you will see “Templates”.



Here is an example of a template done in the Provo Region. With each workshop that was held, the name of the workshop in the first sentence would be swapped out. The rest of the info stayed the same.



*Note: If the **Template** option is not available, that means there are no templates created and enabled for your team.*

Measuring Results

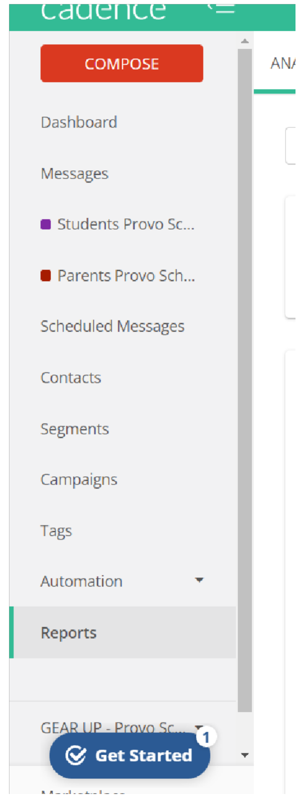
Reports. There are a lot of different types of reports. The options include:

- Unread messages: Export unread text messages for an inbox or a *user. This can be done for any inbox that you have user or admin access for.
- Campaign Reports: Export text message analytic data (how many sent, delivery rate, reply rate, etc.) for all texts within a specific campaign.
- *Message Activity: Export text messages for record keeping, external reporting, or to review individual message content.
- *Undelivered Messages: Export a log of undelivered text messages in order to review and troubleshoot deliverability issues.
- *High Speed Message Activity: Export text messages sent/received by high speed inboxes for record keeping, external reporting, or to review individual message content (This would specifically be for the shared inboxes).
- *Contact Records: Export a set of contact data for a full view of what data and contacts currently exist in Cadence.
- *Opt-Out History: Export a log of all keyword or user-triggered opt-out status changes that have occurred in Cadence.

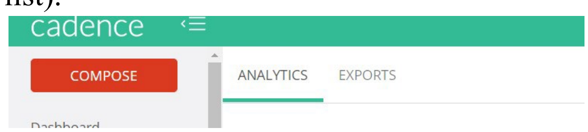
*admin only. Ask your admin for this report.

All of these reports are very helpful in analyzing what is working for GEAR UP and what isn't. Use them fairly often!

To get to the reports, you'll have to navigate



to the bottom of the column on the left hand side. From there you'll find analytics and exports. The export tab is only for admins. Please ask your admin if you need a report in the export tab (starred reports in previous list).

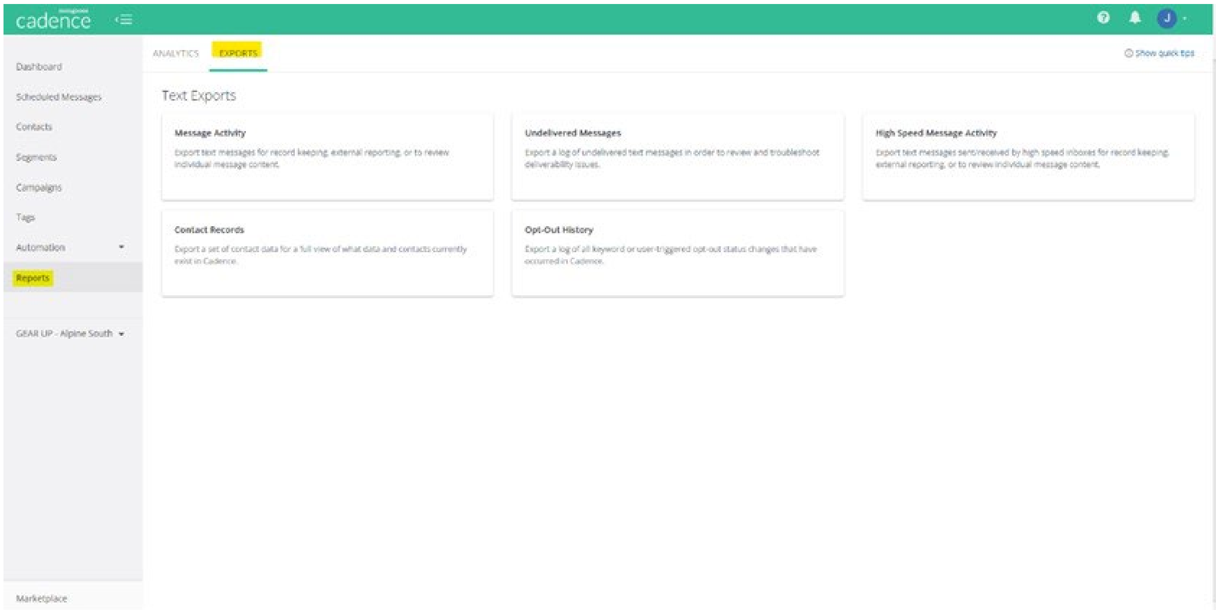


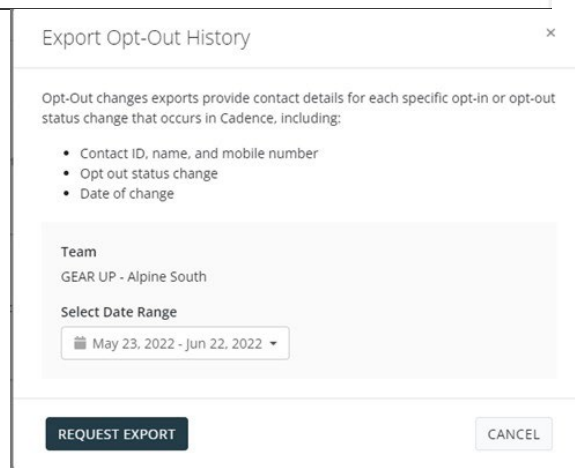
You can find the Unread Message and Campaign reports in the *Analytics* tab. The others will be found in the *Exports* tab.

Dashboard

The Dashboard gives you very quick, visual, and up-to-date analytics. It's pretty easy to read with options to toggle between dates and inboxes and to see recent campaigns. The Dashboard also links you back to the reports page where you have access to all other reports.

Exports





The Exports area will provide the ability to export (.csv file) of the Chat Leads that come in through the Chat Bot. The export will include the collected contact information of the visitor that the Chat Bot collected.

While the above Analytics and breakdowns are available to both User and Admins, the Export tab is only available to Admins.

Once you choose the type of report you want you will be able to select the date range. After you 'Request Export' you will then receive an email with the pertinent information in an excel sheet.

To edit this file on Google Docs, please use this link:
GEAR UP Cadence Training Manual....