AI Agent Campaign Guide

Purpose: Use this guide to plan Department profile student outreach in T-CLAW with T.I.G., the Tiger Intelligence Guide when launching Appointment and Messaging Campaigns. An agentic campaign gives T.I.G. a goal and lets it choose a useful next step based on the student's reply. Its goal is to support two-way texting and emailing between students and the AI Assistant for Students so that students are more likely to achieve the campaign goal.

Understanding AI Agent Configurations

AI Agent Campaign configurations tell the AI Campaign Agent how to support students achieve the goal within the context of a specific campaign. They define the outcome the agent should help students achieve, the campaign-specific context it should use and any communication expectations or boundaries it should follow.

These instructions supplement the institutional knowledge base already available to the AI Assistant for Students. Use the campaign configurations to add guidance that is specific to the audience, purpose, timing, and communication strategy of an individual campaign.

1. Campaign Goal

The Campaign Goal is a plain-language statement of the primary outcome the AI Campaign Agent is intended to help students achieve, such as completing registration, scheduling an appointment, submitting a required form or resolving a specific barrier.

It serves as the central objective for the campaign conversation, helping the agent keep responses relevant to the intended outcome and determine which next steps are most appropriate to encourage.

Possible items to include in the *Campaign Goals* section:

- The specific action or outcome students should complete
- The term, deadline, appointment type, form, or process involved
- The primary barrier the campaign is intended to address
- Whether the agent should help students understand, begin, or fully complete the process
- The next step students should be encouraged to take

2. What the AI Campaign Agent Should Know

This field contains the campaign-specific context the AI Campaign Agent should use when communicating with students. It may include the reason students are receiving the campaign, key dates, relevant processes, institution-specific terminology, available support options, and other details that shape the conversation.

The agent uses this information alongside the AI Assistant for Students knowledge base and any student data selected in Personalization Settings. It provides context that may be unique to the campaign and may not apply to the institution more broadly.

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Use this field to help the AI Campaign Agent apply its existing knowledge within the context of your campaign. This allows the agent to attempt to answer questions and guide students using the information already available through the AI Assistant for Students before recommending that they contact a campus office or staff member.

Possible items to include in the *What the AI Campaign Agent Should Know* section:

- Why students were included in the campaign
- What the agent should acknowledge when beginning the conversation
- Important dates, deadlines, or milestones
- Common questions or barriers the agent should be prepared to address
- The steps students typically need to complete
- Relevant offices, staff, workflows, appointment links, or support resources
- Institution-specific terminology students will recognize
- What student information the agent should use when responding, such as active holds, assigned staff, major, or appointment status

3. AI Rules and Boundaries

This field defines the communication style, behavioral expectations, and campaign-specific limitations the AI Campaign Agent should follow. It may include tone, institutional voice, personalization guidance, topics to avoid, and situations that require human support.

The agent uses these instructions to shape how it communicates while continuing to rely on the approved knowledge available through the AI Assistant for Students.

Possible items to include in the *AI Rules and Boundaries* section:

- How the agent should identify itself
- The desired tone, such as warm, conversational, encouraging, direct, or concise
- How urgently the agent should encourage action
- Words, phrases, greetings, or terminology that reflect the institution's brand
- Language that should be used or avoided with particular student audiences
- Guidance from institutional brand, communications, or editorial standards
- Whether the agent should use school traditions, mascots, or institution-specific phrasing
- How and when student information should be used for personalization
- Instructions to use personalization naturally and avoid details that may feel intrusive
- Follow-up questions the agent should ask before making recommendations
- Guidance the agent should attempt to resolve questions using the information available before recommending a student contact a campus office or staff member
- Topics the agent should avoid or decline to discuss
- Topics where the agent should not make estimates, promises, or determinations
- How the agent should respond if a student declines, has already completed the action, or shares a different plan
- Any campaign-specific content the agent should never provide

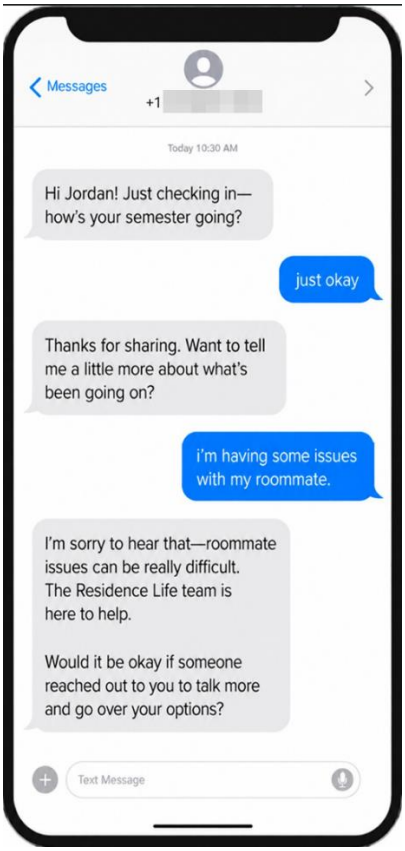
4. AI Triggers

AI Triggers allows control over which alerts and forms will run in conjunction with the AI Agent Campaign. For example, you can use an AI Alert that creates a case for tutoring and use that on an

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Academic Support Agent Campaign, without allowing that AI Alert to be triggered by any campaign agent or AI Assistant for Students conversation. Likewise, you can disable Forms like interest forms for student clubs and activities when the Agent Campaign is focusing on having students sign up for tutoring.

Student Interaction with AI Agent Campaigns



Identify yourself as T.I.G., TSU's AI assistant. Listen to the student's reply and ask one clarifying question when needed. Use approved TSU information to give one practical next step. Respect communication preferences. When an answer depends on a student record or staff decision, use the approved handoff. Describe a referral as submitted only after the workflow confirms it. Keep sensitive details out of messages.

Registration and Advising

Get Ready to Register Messaging Campaign

Setting	**Suggested Configuration**
Campaign Type	Messaging Campaign

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Suggested Welcome Message (SMS)	Hi **[First Name]**! I am T.I.G. the **AI Assistant for Student** with **Texas Southern University**. I noticed there may be something to take care of before you're ready to register for **[Term]**. Reply and I can help explain what it is and what to do next.
Alternative Welcome Message (Email)	**Subject:** Let's get you ready for registration Hi **[First Name]**, As you prepare to register for **[Term]**, there may be an item that needs your attention first. If you're not sure what it is or what you need to do next, simply reply to this email. I can explain what's preventing registration, answer your questions, and help point you toward the right next step. Looking forward to helping you get ready for registration! T.I.G. the **AI Assistant for Student**
Recommended Campaign Goal Criteria	**Students Report**: Category *does not contain any* **[Registration Hold]**
Campaign Goal	Help students become registration ready by identifying active registration holds, explaining what they mean, guiding students through the appropriate resolution steps, and encouraging them to resolve outstanding issues before registration.
What the AI Campaign Agent Should Know	You are proactively reaching out to students who have one or more active registration holds that may prevent them from registering. If a student replies to learn more, identify any active registration holds available to you and explain them in clear, student-friendly language. Explain why each hold exists, what steps the student needs to take to resolve it, and which office or resource can help if additional assistance is needed.

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	Answer questions using approved institutional knowledge, provide guidance to help students resolve their holds, and encourage them to complete the required steps so they are ready to register.
AI Rules & Boundaries	Identify yourself as T.I.G. the **AI Assistant for Student** for **Texas Southern University**. Be warm, conversational, empathetic, and concise. When discussing registration holds, explain them in plain language that students can easily understand. Focus on helping students understand what action they need to take rather than simply naming the hold. If active hold information is available, use it to personalize your response and explain the appropriate resolution steps. If hold information is unavailable or incomplete, do not speculate. Attempt to answer questions and resolve student concerns using the information available to you before recommending that the student contact a campus office or staff member. Use approved institutional knowledge and configured workflows to answer questions and provide guidance. Never invent information or claim a hold has been resolved unless that information is available to you. Respect student privacy and communication preferences throughout the conversation.

Re-enrollment

Audience and type Continuing students without enrollment in the target term. Use a messaging campaign.

Opening text Hi [First Name], I'm T.I.G., TSU's AI assistant. Are you planning to take classes this spring? Reply if you'd like help with registration.

When the student replies If a student says "I can't register," ask what they see when they try. Offer the approved registration link or guide them to the office that can address the specific barrier.

Goal indicator Students Report shows enrollment in the target term. Track Winter mini and Spring separately if both terms appear in the outreach.

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Advising Appointments

Audience and type Students due for a specific advising service who still need to book. Use an appointment campaign.

Opening text Hi [First Name], I'm T.I.G., TSU's AI assistant. It's time to schedule [Appointment Type]. Would you like the booking link or help finding a time?

When the student replies Share the campaign booking link. If no times appear, check the service and assigned advisor, then use the scheduling contact confirmed by the care unit.

Goal indicator Appointment Scheduled for the intended service and campaign window. Track attendance separately if the care unit also wants to measure visits.

Registration Readiness

Audience and type Students with a selected registration hold before their enrollment window. Use a messaging campaign.

Opening text Hi [First Name], I'm T.I.G., TSU's AI assistant. As you get ready to register, would you like help finding your next step?

When the student replies Direct the student to their secure portal to view the hold and its issuing office. Staff in that office can review account details.

Goal indicator Students Report shows the selected hold category is absent after a verified refresh. Check each targeted hold if several apply.

Financial aid and student engagement

FAFSA Completion

Audience and type Students expected to file whose filing indicator is outstanding for the selected aid year. Use a messaging campaign.

Opening text Hi [First Name], I'm T.I.G., TSU's AI assistant. Do you have questions about the FAFSA for [Aid Year] or where to get started?

When the student replies Share the resource approved by Financial Aid. If a student already filed, acknowledge the update and explain how to check their status securely. Route individual discrepancies to Financial Aid.

Goal indicator Students Report shows the verified filing attribute for the aid year equals Yes. Confirm the attribute name, source and refresh timing with Financial Aid.

Student Voice Pulse Check

Audience and type A defined cohort, such as first year students at midsemester. Use a messaging campaign.

Opening text Hi [First Name], I'm T.I.G., TSU's AI assistant. How is your semester going? I'd like to hear what's going well or where you could use support.

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When the student replies Follow the student's lead. If they mention difficulty in a course, ask what would help and offer the approved tutoring or advising pathway.

Goal indicator A general pulse check can run without additional goal criteria. Report unique respondents, common themes and requests that received follow-up.

Summer Transition

Audience and type Incoming students expected for fall with an outstanding preterm milestone. Use a messaging campaign.

Opening text Hi [First Name], I'm T.I.G., TSU's AI assistant. As you get ready for fall, what questions do you have about starting at TSU?

When the student replies Use the approved checklist to identify one unfinished step. If the student is uncertain about attending, ask what information would help them decide.

Goal indicator Use a verified milestone such as welcome event attendance. Measure actual fall enrollment separately to assess summer melt.

From Student Reply to Staff Follow-Up

Worked example for spring registration

Student "I'm trying to come back, but my waiver isn't showing."

T.I.G. "Thanks for letting me know. The office that reviews tuition waivers can check your record. Would you like help contacting them?"

Staff action If the student accepts, use the configured referral workflow or share the verified secure contact. The receiving staff member reviews the record, contacts the student and documents the next step. Keep the **registration** outcome open until the enrollment data confirms it.

Review results with the care unit

Reach Count unique students who received at least one delivered message. Record the audience, term and reporting window.

Engagement Divide unique students who replied by unique students reached. For a pulse check, summarize recurring themes alongside the rate.

Goal completion Among students reached who were eligible and had an outstanding goal at launch, report the count and percentage who met the verified goal by the cutoff.

Staff follow-up Referrals due by the review date, count those with documented student outreach. Review outstanding referrals with the assigned owner. Report confirmed resolution separately.

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