Advisor CRM
Getting Started

1

Connect Outlook

Connect the CRM to Outlook to see all of your appointments with students in one place and to attach emails to a students account in the CRM.

2

Set up Availability

Setup your availability in the CRM so students can select times when you are available to meet. You will get an email when a student schedules an appointment with you.

3

Communicate availability to advisees

You will want to let your advisees know that they can now schedule time with you via MyMadison Connect. Academic Advising has created a sample email you can use to communicate .

4

Meet With Advisee/Review Data

If you want to familiarize yourself with a student prior to meeting with them you can look up their student data in the CRM.

5

Document Meeting

After the meeting, close the appointment and enter any significant interactions using the DAP note taking model. You can also attach any documentation that may be relevant.

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