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.

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.

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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 .

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.

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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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