CollegePlannerPro

Guide: Creating an Impressive Sample Student Profile

Why This eBook?

This eBook was created to offer tips for creating the ultimate sample student profile. By creating a sample student, you will become more familiar with the tools available to you within CollegePlannerPro. Additionally, you'll have a rich profile that you can show off to win more prospective clients.

Keep in mind that CollegePlannerPro is a flexible toolkit. Customize the sample profile to demonstrate the ways you and your students use the system.

Ready? Great, let's get to it!

CREATE A SAMPLE STUDENT

The key to creating a great sample student profile is populating it with realistic, relevant, and compelling information. The goal is to show off the capabilities and the value of the robust software system you will use to keep students on track.

> **TIP: Each subscription plan allows for one additional active student above the stated limit to be used for your marketing purposes.**

STEP 1: POPULATING STUDENT INFO

To start, you'll need to add a sample parent's information to CollegePlannerPro, then you can begin populating the student information by following the tips below. Click here to learn how to add a parent (contact) profile and student profile.

STUDENT NAME: Have fun with it! Remember, this is just a sample profile. We're naming ours Doogie Howser! Need help populating contact information? You'll find instructions here: How do I edit a student's contact information?

EMAIL: You'll want to use a real email address so that you may send sample messages to the student. To avoid confusion, we suggest that you use unique email addresses for your sample parent and sample student, and avoid using the email address associated with your CollegePlannerPro account. If you don't have personal email addresses you can use, we recommend a service like Mailinator.com which allows you to see how sample emails appear in a fake email inbox without having to create multiple test email accounts.

HIGH SCHOOL & GPA: We recommend entering a high school that is local to you, along with a GPA that is representative of the typical student you work with. Later on we'll be adding colleges and assigning admissions probabilities, so you'll want to keep that in mind as you add the GPA.
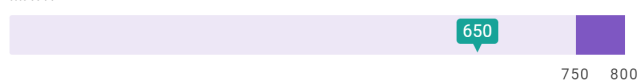
SAT/ACT/SUBJECT TEST SCORES: Realism is key here. Enter SAT or ACT scores that are in line with what a student with the GPA you entered would likely score. This will be important when you show parents college profiles and the "How do I match up?" graphs...

SAT

READING AND WRITING

560

710   770

MATH

650

750   800

STEP 2: BUILDING THE COLLEGE LIST

MY SUGGESTED COLLEGES: Add some colleges to the My Suggested Colleges list. Select schools that are popular with students in your region, and align well with the persona you're creating. Also be sure to select colleges you are familiar with, as you'll be assigning admissions probabilities in a future step.

APPLICATION DEADLINES: Click on a school that you have added to your student's suggested colleges list to select the date your student plans to apply to each college.

TIP: If you have not already done so, you may want to import the application deadlines to your account.

ADMISSION PROBABILITY: Using your expertise, assign admission probabilities for each college based on the type of student you're creating. You can customize the admission probability labels in your account's Settings & Preferences section.

How Does Doogie Plan to Apply?

| Regular Decision | November 30 |

Add more deadlines for University of California-Los Angeles

Doogie's Admission Probability

| Likely |
| Possible ✔ |
| Reach |

APPLICATION REQUIREMENTS: Select a couple schools from the list and add application requirements. You will likely only show parents a couple colleges on the Application Outline later, so there's no need to add requirements for all the colleges on your list.

TIP: Core requirements will be assigned the target deadline that you have selected for your student. Add "Other Requirements" with specific due dates that you'll later be able to show parents on the calendar. For example: Art Portfolio, Campus Tour, etc.

COLLEGE PROFILE REPORT: Create a College Profile Report for your student. As a bonus, if you have notes saved on any of the college profiles on your suggested college list, import them to the college profile report. When you're done, make sure you make the report visible to your student.

FLIP THE SWITCH

Turn on your sample student's account access.

CustomCollegePlan.com Student Access

Account status: ⬤

Doogie currently can not login.
Enabling the account will NOT send an email.

STEP 3: ADDING MORE DETAILS

STUDENT TO DOS: Add a few student To-Dos to the student profile. The To-Dos on the right are just a few examples. Customize these To-Dos to represent the way you will work with your students. We also recommend grouping the due dates of these sample To-Dos together in the same month. That way you'll be able to show parents the To-Dos on the student calendar while giving them the tour of your sample CustomCollegePlan account!

Doogie's To-Do's

Sort by...

☑ Not completed   ☑ In progress   ☑ Completed

Take SAT Practice exam
Completed   Complete By 02/19/21

Create a list of majors you are interested in
In Progress   Complete By 04/01/21

Research Colleges on Suggested List
Not Completed   Complete By 04/02/21

Complete Learning Style Assessments
Not Completed   Complete By 02/05/21

Register for the SAT
Not Completed   Complete By 03/26/21

Meetings with Doogie

29 Jan	Friday, Jan 29, 2021 New Year Check-In ZOOM	1:45PM - 2:45PM
28 Oct	Wednesday, Oct 28, 2020 Sandra and Student	11:00AM -12:00PM
24 Sep	Thursday, Sep 24, 2020 Meeting: Group Session	11:00AM -12:00PM

MEETINGS: Add some meetings to your student's profile. Customize this to the type of meetings you will typically have with your student. Whether they be sessions to work on college essays, parent and student check in meetings, or workshops, name these meetings as you see fit.

FILES AND FOLDERS: Create folders. Customize these to how you will work with your student. Will you keep track of your student's SAT or ACT prep? Create a "Practice Test Results" folder and upload a few PDF files as an example.

Files & Folders

General Folder

Essay Drafts

Practice Test Results

CREATE A SAMPLE STUDENT

NOTES: Add notes to your student profile and email them to your sample student, and copy the sample student's parents as well. The key here is to display the value that the system adds for the family. Some great examples would be meeting recap notes, where you are clearly keeping families in the know with what you've been working on with your student.

My Student Notes & Emails

Saved Tuesday, January 26, 2021 at 05:39 PM — OPEN

Doogie and I reviewed the results of his Achieveworks Intelligences assessment.

His assignment before our next session is to come up with a list of majors/fields of interest for us to discuss.

Follow up: Need to email • 01/26/21 • 5:00 PM
Note by: Joe Counselor

Saved Tuesday, January 26, 2021 at 05:38 PM — OPEN

During our meeting today, Doogie and I talked about his prep plan for SAT/ACT testing, his college list and his goals for junior year.

Next meeting, Doogie will bring his "key college criteria" worksheet and results from the Achieveworks Intelligences assessment.

Follow up: Research • 01/01/21 • 5:45 PM
Expectation: Start creating college list for Doogie
Note by: Joe Counselor

Saved Tuesday, January 26, 2021 at 05:38 PM — OPEN

These are the additional college research sites that Doogie and I discussed:

www.unigo.com
www.collegenavigator.com

Note by: Joe Counselor

Print Note Options

CREATE A SAMPLE STUDENT

STEP 4: ROLE PLAY AS YOUR STUDENT

STUDENT ACCOUNT SETTINGS: Head over to your student's Account Settings and make the Application Outline visible to your student.

LOG IN AS THE STUDENT: Here's how.

ADD A PHOTO: Click the pencil icon next to the circle in the welcome banner on the Dashboard. This will bring you to the profile page, where you can upload a profile photo for your student. Again, have fun with it! Match the sample name you picked out.

UPDATE TO-DOS: Add your own To-Dos, edit the statuses of existing To-Dos, and add comments as the student. To change the status of a To-Do, you can click the item to open it in expanded view, or simply drag and drop it from one status column to another.

UPLOAD FILES: Upload files as your student. Vary the types of files including Google Docs and give the files appropriate titles.

START A CONVERSATION: Play the part! Send messages back and forth between the consultant and student using the Conversation feature.

CREATE A SAMPLE STUDENT

MY LIST OF COLLEGES: On the student's Colleges tab, select a handful of schools to move over to the student's "My List" of Colleges. Remember to select the colleges for which you previously entered Application Requirements.

TIP: Drag these schools to the top of the "My List" of Colleges so they appear first on the Application Outline tab.

APPLICATION OUTLINE: Mark a few of the requirements as "Completed."

THAT'S A WRAP

You should now have a well-rounded sample student profile, full of examples of the features and how you use them with your students! We hope this becomes a valuable addition to your initial consultations with families.

Using CollegePlannerPro to "Wow" Families During the Initial Consultation

Verify to continue

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I'm not a robot

reCAPTCHA
Privacy - Terms

This recorded webinar will help walk you through the steps we covered for creating your own impressive and realistic sample student profile.

We then discuss the optimal way to showcase the CollegePlannerPro and CustomCollegePlan platforms for families during an initial consultation.

Strengthen your value and land more clients by implementing this piece of the puzzle!