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salesforce advisor link

Designed for the Art of Advising

Advising has changed. Students want advisors to understand their whole story, from application, acceptance, academics, personal challenges to career goals. They need a copilot for their journey.

Salesforce Advisor Link helps advisors of all types be more efficient and proactive, so students can be more successful. Whether it's onboarding and pre-advising, academic, athletic financial aid or career advising, Salesforce Advisor Link provides real-time insights, collaborative tools, and a platform for engaging students in a more personalized way so advisors spend less time trying to connect the dots, and more time connecting with students.





Empower Students To Drive Their Own Success

Understand Your Student's Interconnected Story

The profile of today's student population looks very different to that of decades past. Today, "new traditional" students are on average, older, more experienced in work, and more socioeconomically diverse. With the change in student demographics, student expectations are different. They're looking for a more connected experience: One that's proactive, makes it easy to connect and access the support they need, on the channel they prefer. In a recent study of institutions across the US, 77% of students said they would like their school to use more of their personal information to enhance their college experience and help them stay on track*. This is where connected student data and powerful engagement tools become critical to successful student experiences.

When students have positive growth experiences and personalized recommendations, it can have a powerful influence on retention and persistence rates. Your advisors are in the best position to deliver these experiences, but they need better, smarter tools.

Salesforce Advisor Link empowers advisors and students to drive success in a whole new way. Built on the Salesforce platform, Advisor Link puts the latest innovations like EDA, Service Cloud, and Einstein Artificial Intelligence into the hands of your advisors and delivers a mobile experience for your students to build connections and stay on track.



Now your advisors can:



Scale Advising Impact

Create one-to-many success plans and intervention campaigns to simplify your process and get current and prospective students on the path to success. Extend the advising community and align all of your staff around the student. Engage students where they are with real-time support right on their mobile phone. Help students find answers to common problems through self-service tools, so advisors can stay focused on the most important issues.



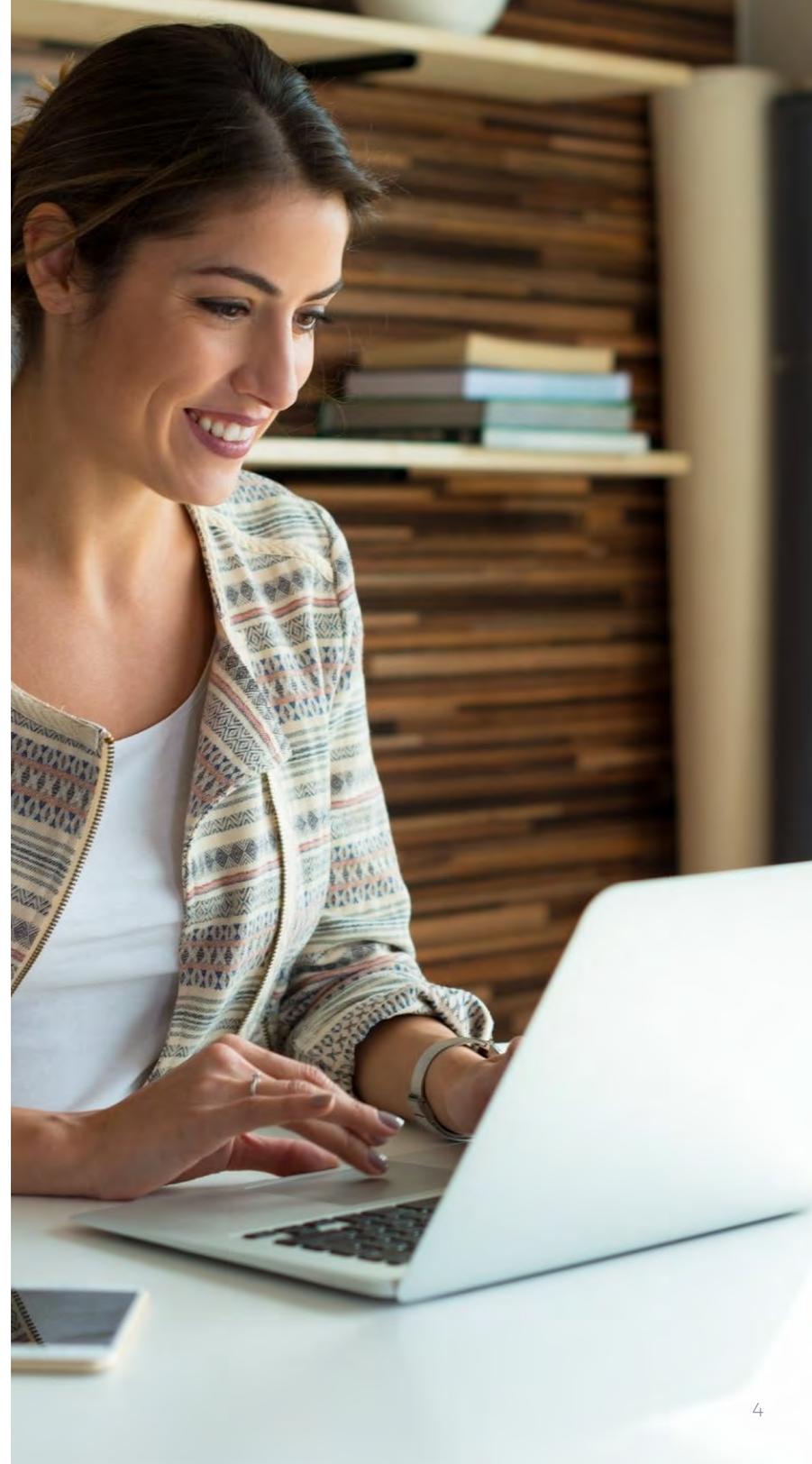
Build Trusted Relationships with Students

Simplify appointment and task management. Put data at your advisors' fingertips and allow them to see every student's academic health, action plan, and success roadmap in one view. Collaborate with incoming and current students on success plans, connect them to the right resources, and automate follow-up to keep them on track.



Gain Insights and Action On Real-Time Data

Set up data-informed early alerts and success scoring. Get automated and community-submitted notifications to help prioritize at-risk students and encourage high achievers. Make faster improvements to advising strategies by monitoring trends and insights from real-time analytics.

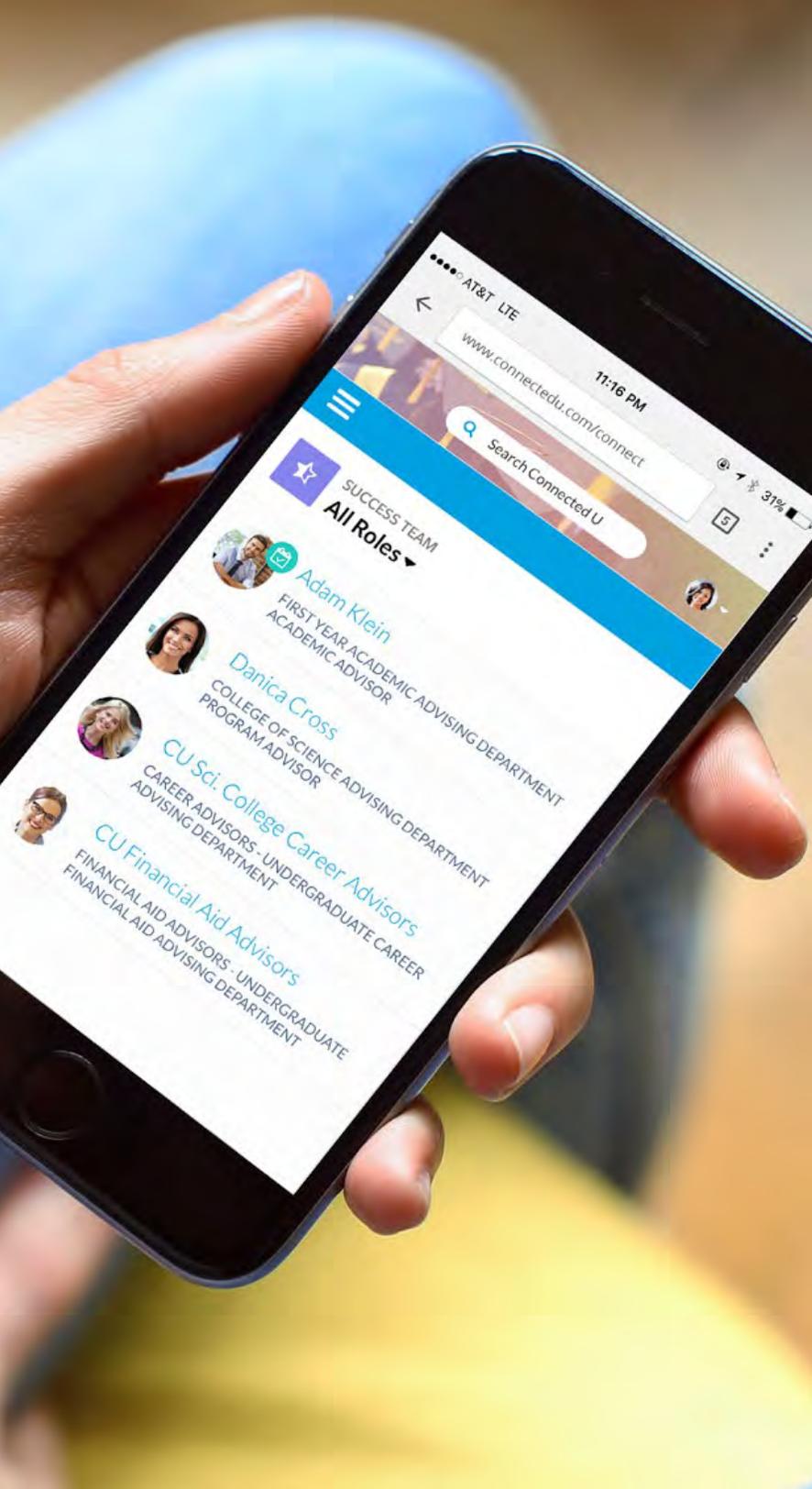




Mobile First Design for Student Engagement

Institutions are increasingly meeting students where they are to bridge the student engagement gap. Leveraging mobile solutions and student-centered communications to influence their behavior, schools can empower students to become an active participant in their own success.

Advisor Link provides an out-of-the-box student mobile experience so students can manage advising appointments, stay on track with tasks, receive text alerts and engage in real-time with members of their success team and the university community. Advisors have the ability to enhance student outreach with text messaging, share knowledge articles and stay connected with students anytime, anywhere.



Tools to Create Your Vision of Student Success

Salesforce Advisor Link is designed to deliver insights to both advisors and students. Built on the #1 CRM platform, Advisor Link will give the entire university community a unified way to drive student success.

 **Unified Advising Record** – Manage your day on one screen through an advising console, giving advisors one view to understand a student’s engagement, academic program, affiliations, and more. All advisors and support staff can collaborate on a unified advising record over time, add advising notes and track activities so advisors can have meaningful interactions with students and provide the right service and support.

 **Degree Planning Tools** – Build tailored degree plans and actively collaborate with students on their pathway to success. Advisors and students can easily understand course requirements for their degree or other selected program by viewing program plans and requirements. Students can create a personal degree plan in their student community and add the appropriate courses. Advisors can view and edit those plans, and collaborate to encourage on-time graduation.

 **Scalable Planning & Communication** – Put incoming and current students on a path to success with only a few clicks using pre-built communication templates. Monitor progress with automated emails and texts for appointment reminders, important deadlines or words of encouragement. Design and reuse plan-of-action templates to create comprehensive pathways help them achieve their goals.

 **Success Teams** – Make it easy for the advisee to connect with their advisor. A student can be placed on a success team that may include their academic advisor, career advisor, coach, financial aid advisor or resident assistant. When a student accesses Advisor Link, they can instantly see who is on their success team and their advisor’s contact information in one place.



Advising Appointments (Advisor) – Advisors can define blocks of time when students can meet with them and topics (career, academic, financial, etc.), and make it easy for students to see their availability and policies.



Advising Appointments (Students) – Students can see their advisor's availability and set up an appointment right from their phone. Appointments can be synced to students' calendars and meeting notes are stored for future reference.



Advising Queue Management (Staff) – To manage walk-in hours, students to be checked in by a staff member at the front-desk and assigned to the next available advisor. Advisors can view cases or requests and be notified when students check-in. They can also receive the student and start the meeting without manual hand-offs or emails.



Advisee List View – Advisors can quickly create different views of advisees (like “high-risk pool,” “all out-of-state students,” or “first-generation students”), so they can stay engaged with every group of students.



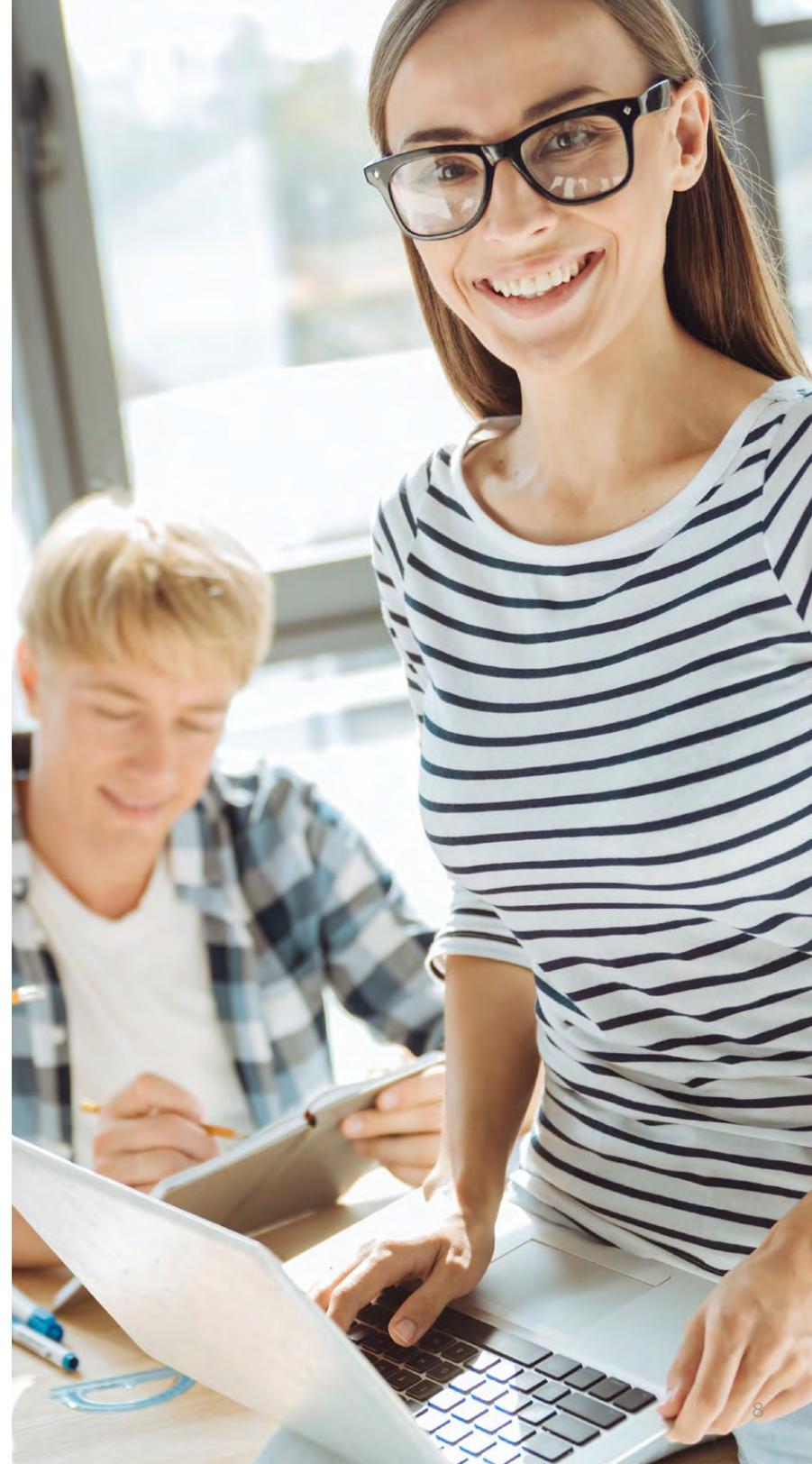
Data-Informed Alerts – Bring that data together from your SIS, LMS, Degree Audit, predictive software, and other systems to determine if a student is at risk. Configure automated alerts based on that aggregated data and enable faculty members and other staff the ability to log manual alerts that route to their advisor.

“Students now have interconnected lives. They expect us to have the information that tells their whole story and create a developmental path unique to them.”

– **Douglas R. Little**
Senior Assistant Dean & Director of Academic
Affairs Georgetown University
School of Nursing & Health Studies

“Advisor Link gives advisors that single view of all of their advisees, relationships, and notes, and allows them to quickly drill down on a student and see all of the real-time data.”

– **Laura Campbell**
Associate Registrar,
Enrollment Systems and Services,
Algonquin College





Ready to get started?

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