



## Top 5 Tips from GuidedPath Power Users

Advisors share their tips for running their consulting business easier using GuidedPath.

### 1. Custom Menu.

This feature changed my life. Coolest thing is this feature is integrated with your Google Drive so you can customize the heck out of it and when you update your informational documents – it automatically updates on the Custom Menu. Genius. I constantly remind my students about this invaluable resource. It has eliminated my need to “attach” anything to my emails (which they don’t read anyway).

### 2. Resources.

Customize, customize, customize. This feature allows you to list your favorite resources (websites) and again – constantly remind your students of its existence. So, when you’re meeting with them and you discuss Poets & Quants, for example, you mention that they don’t have to necessarily remember this web address or name, because it is in their Resources. I use this for my favorite virtual campus tour websites, Financial Aid and Scholarship links, mental health resources and internship resources, to mention a few. Brilliant.

### 3. Application Plans.

Tired of researching, checking, and updating each application plan, for each student? What an epic poor use of time! At the beginning of each application season, confirm and update each colleges plan, within your College Configuration (accessed via your Account). Make sure you understand the nuances of this feature. When used properly, every student applying to “that” college will have the most current plan details. Adios unnecessary repetition. YAY!

### 4. Assignments.

At each meeting, take notes in your Advisor Notes (private – for your eyes only), then copy and paste what you want into the Assignment tab. You can change the end date (second one) to coincide with the next scheduled meeting. Subject is usually “tasks to be completed by next meeting”.

## 5. Appointments.

I schedule every appointment at the close of the current one. Links to Calendly (and I suspect other scheduling platforms). Links to my google calendar and sends reminders. Easy Peazy. Massive time saver.

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## 1. Surveys.

Use surveys to get to know your student. The LEARN surveys are particularly helpful for that purpose. All the LEARN surveys are assessments with results. The results are in a report you can use with parents/students.

## 2. Find My Spark.

Knowing the personality type of your student is very helpful. Use the personality type to understand where your student is in the 16 Myer Briggs personality types. Are they in the most common, or one of the least common personality types?

## 3. Learning Styles.

This can be a valuable resource for students. It helps them understand their learning style, and use the study tips to study for school, ACT/SAT and more.

## 4. College Match.

I was using this before I had GuidedPath. I am glad Steven Antonoff's survey is included in GuidedPath. Use the results to help with the college list building.

## 5. Custom Surveys.

Build your own custom survey in GuidedPath. I had a survey from before. It was easy to add it into GuidedPath using the custom survey feature.

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