**Meetings**

**Meetings Overview**

While we are learning to be flexible in this remote environment, meetings have historically been the core of Bottom Line's program model. We believe there is value in real-time, voice-to-voice (and once it's safe again, face-to-face) connection with our students.

Log a meeting each time you talk to your student over the phone or video, as long as you are providing value-add during that interaction.

* For example, a call to remind a student about a Bottom Line event happening tomorrow is not a meeting. A call where the advisor and student discuss the student's plan to resolve an issue with the financial aid office is a meeting.

**Step 1: Install Lightning Sync**

In order to establish a connection between your Outlook account and Salesforce, you will need to follow [these instructions](https://tbl500amory.sharepoint.com/:w:/s/SuccessProgramCurriculum/EbmgeCRoSSBKuH9_zCcs5VkBGL5LtCVzFTxxQBfFZGASBw?e=wNaYiU).

**Logging a Meeting**

There are two ways to log a meeting in Salesforce. Watch the video to get an overview of each, and read more details below.

* 0:17-1:43 - Connecting to Outlook
* 3:20-5:42 - Canceled/Rescheduled Meetings
* 6:46-7:54 - Adding a Meeting through Salesforce

**Connect to Outlook**

The most common way is to connect an Outlook appointment directly with a student's Salesforce record when the meeting is scheduled.

* Find and select the student's Program Record (look for the Bottom Line logo!)
* Click "Log"
* Click "Save"
  + When future meetings are connected to Salesforce, the Advisor Dashboard will tell you the date of the student's next scheduled meeting
* Canceled or rescheduled meetings need to be manually changed/deleted both in Salesforce and on the calendar. If a meeting is in Salesforce and the date has passed, the assumption is that it occurred.
  + Missed meetings:
    - Click the meeting in Salesforce
    - Click "Delete" in the top, right-hand corner
    - Capture the cancelation in Outlook however you normally would
  + Rescheduled meetings:
    - Click "Edit" on the meeting (top right-hand corner) in Salesforce
    - Change the date & time
    - If applicable, change the due date of any tasks you intend to complete during the meeting
    - Capture the change in Outlook however you normally would

**Use the "Add a Meeting" Function**

Occasionally, you may have an impromptu meeting with a student you weren't planning to meet with previously. To save time, rather than asking you to create an appointment in Outlook and connect it to Salesforce, you can use the "Add a Meeting" function.

* More details on how to add a meeting directly in Salesforce can be found [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#adding-a-meeting).

**What Curriculum Should I Cover in my Meetings?**

**Not sure what to cover in a student meeting?** Use the "Upcoming and Overdue" section on your [Engagement Tab](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx) to view both automated and advisor-added tasks with a due date coming up soon.

**Time-sensitive tasks all set?**Look ahead at the student's [Employability Milestone tasks](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx), that may have due dates a few months in the future. Is there anything on that list you can start working on now to get ahead?

**Still looking for direction?**Review the [Service Plan Roadmaps](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Service-Plan-Road-Maps.aspx) to jog your memory on the priorities for students based on their progression through college, and browse our [full curriculum](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/College-Success.aspx) to see if there are any other specific services that might help your student increase their confidence.