



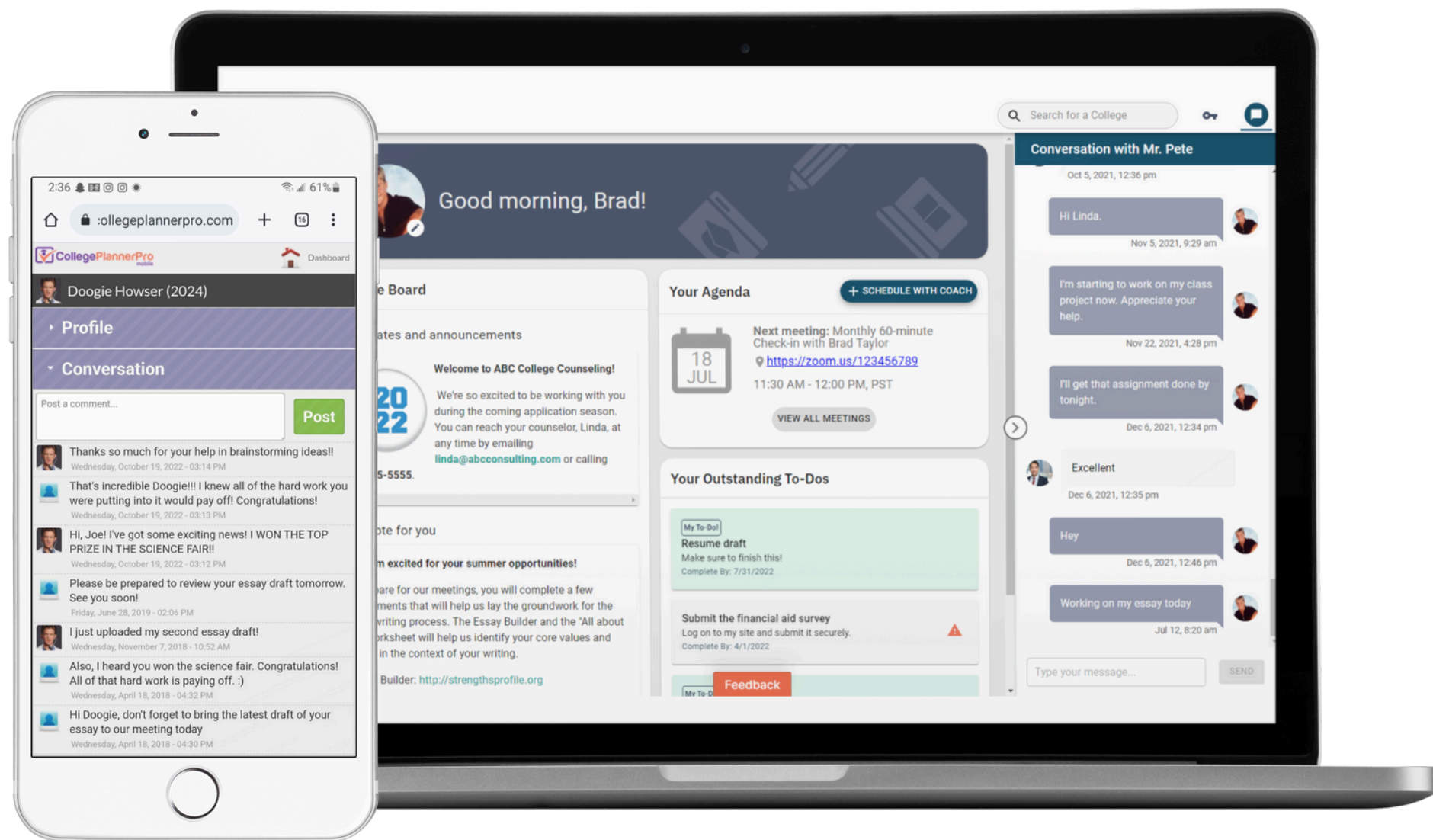
Creating an Impressive Sample Student Profile

A step-by-step guide

Ready to Get Started?

This guide was created to help you build a compelling, realistic sample student profile—one that not only familiarizes you with the tools inside CollegePlannerPro, but also showcases the value you bring to prospective clients. A thoughtfully crafted profile demonstrates how you organize, plan, and support your students throughout the college admissions journey.

CollegePlannerPro is a flexible toolkit designed to adapt to the way you work. Use this opportunity to customize your sample student profile to reflect your counseling style, typical student profile, and workflow.



Step 1: Getting Started

First, Add a Sample Parent Contact

To start, you'll need to add a sample Parent Contact to CollegePlannerPro, then you can begin populating the student information.

1. Go to the **Contacts** tab
2. Click **Add Parent(s) Contact**
3. Enter required info (Name and Recruitment Source at a minimum)
4. Click **Save Contact** to create the profile

The screenshot shows the 'Contacts Main' interface. At the top, there's a navigation bar with 'Dashboard', 'Contacts', 'Students', 'Broadcast', 'Calendar', and 'Colleges'. A search bar is on the right. Below the navigation bar, there are four icons: 'Profile Note Templates', 'Add Parent(s) Contact' (circled in red), 'Add Professional', and 'Manage Profile Tags'. An 'Add New Contact' modal is open, showing a 'Basic Info' section with fields for 'Contact Type' (set to 'Parent Contact'), 'First Name', 'Last Name', 'Email', and 'Recruitment Source'. At the bottom of the modal are 'Cancel' and 'Save Contact' buttons.

Then, Add a Sample Student

From the newly created parent profile page select “Add student to this profile.” Add in the required details.

- **Name:** Pick something fun—this is just a sample!
- **Email:** Use a real, unique email (not your own CollegePlannerPro account email) so you can test messages. Use a personal email address or try [Mailinator.com](https://mailinator.com) for quick inboxes.

Select **+ Client** to activate your sample student profile.

The screenshot shows a 'Student Information' modal for 'Vivian Nguyen, Class of 2029'. It has 'Edit' and '+ Client' buttons. Below this is a section with an upward arrow icon and the text 'Add a student to this profile'.

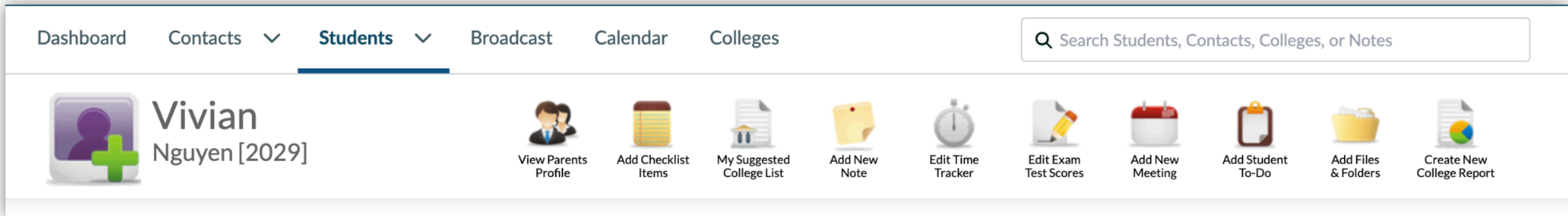


Each subscription plan allows for one additional active student above the stated limit to be used for your marketing purposes.

Step 2: Populate Student Information

Navigate to the Student Profile

From the parent profile, click the student's name, or use the search bar in the top navigation to open the newly created student profile page.



Use the toolbar from within the student profile page to populate sample information, including:

High School & GPA

[How to edit student details](#)

Hover over the student's name and click to add contact details. Choose a local high school and a GPA typical of your students.

ACT/SAT Test Scores

[How to add student test scores](#)

Use realistic scores that match the GPA. This will make college comparisons and “How do I match up?” graphs meaningful.

Student To-Dos

[How to add a student to-do](#)

Add sample To-Dos that reflect how you work with students. Group due dates in the same month so parents can see them on the student calendar during a tour.

Meetings

[How to add a meeting](#)

Add meeting examples (introduction call, essay sessions, college list presentation, etc.) named to match your usual program workflow.

Files & Folders

[How to add a document](#)

Create folders that reflect the resources you share with students. For example, an “Essay Resources” folder with sample PDFs.

Student Profile Notes

[How to add a student profile note](#)

Add meeting recap notes and email them to the student to show how you keep families informed.

Step 3: Building the College List

My Suggested Colleges

[How to create a suggested college list](#)

Add colleges to the Suggested Colleges list that are popular in your region and align with your sample student’s profile. Choose schools you know well, as you’ll assign admission probabilities later.

Application Deadlines

First, [import application deadlines](#) into your account. Then, select each college and set the date your student plans to apply.

Admission Probability

[How to set admission probability labels](#)

Assign realistic admission probabilities based on your sample student. You can customize these labels in your Account’s Settings.

My Suggested Colleges

Drexel University

Likely

Loyola Marymount University

Early Decision II (Jan 8, 2026)

Likely

University of Oregon

Likely

Chapman University

Possible

Emerson College

Possible

University of Washington-Seattle Campus

Possible

Boston University

Reach

BU

Olivia Fairchild

Boston University Profile

Olivia's Admission Probability

Likely

Possible

Reach

Application Requirements

[How to add application requirements](#)

Pick a few colleges and add Core Application Requirements (e.g. high school transcript, letters of recommendation, etc.). Then add a couple “Other Requirements” (e.g., Interview, Campus Tour, etc.) with specific due dates. You’ll likely only showcase a couple of these later in the Application Outline.

College Comparative Report

[How to create a college comparative report](#)

Generate a College Comparative Report for your student. Pull in important data fields (all pre-loaded in CollegePlannerPro!) that you typically discuss with families when evaluating schools.

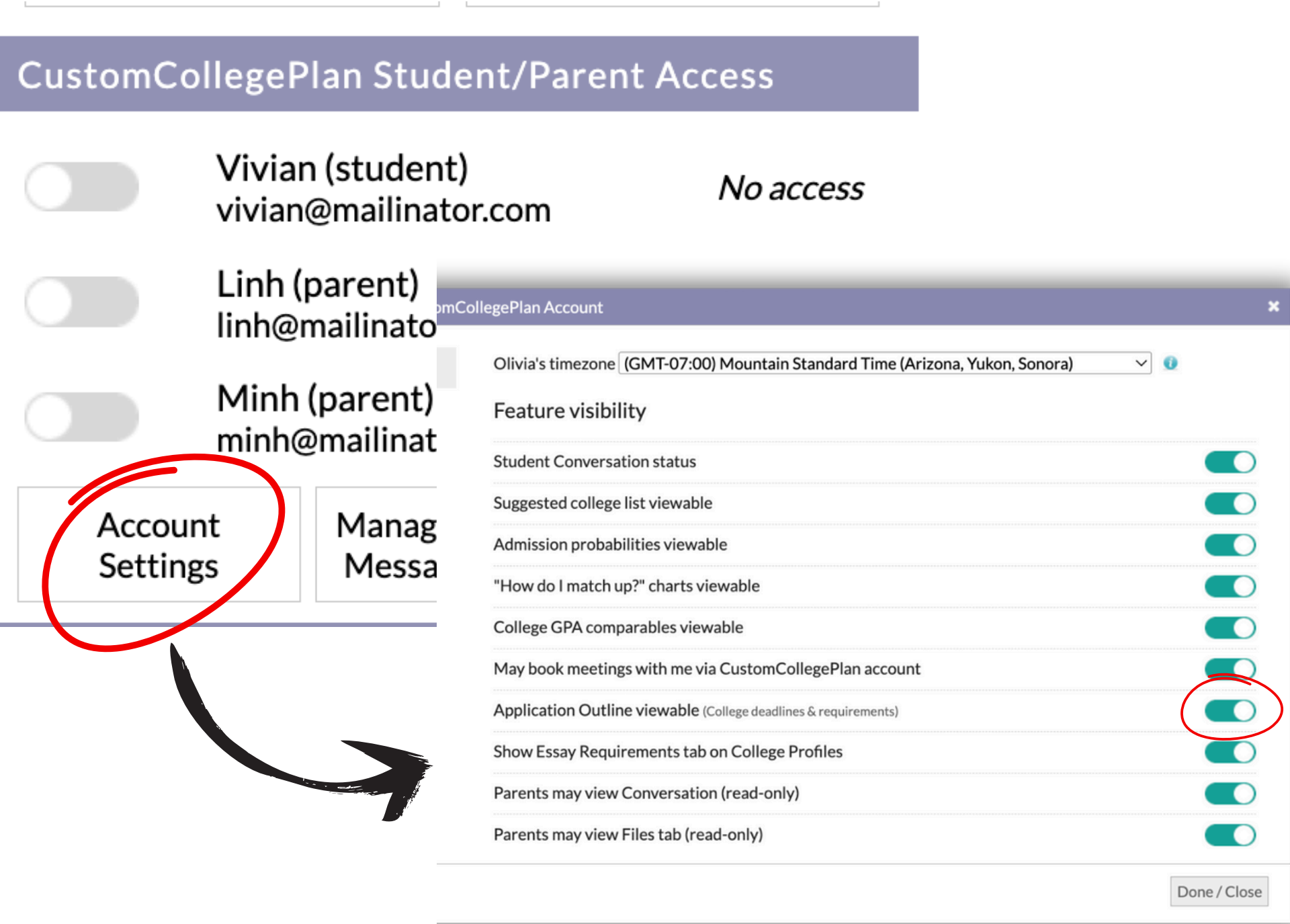
TIP: You can create multiple College Comparative Reports for a student. Get creative with segmented data reports and explore our preloaded template, “[Admissions Requirements Comparative Report](#).”

Step 4: Role play as your sample student

Student Account Settings

[How to manage student account settings](#)

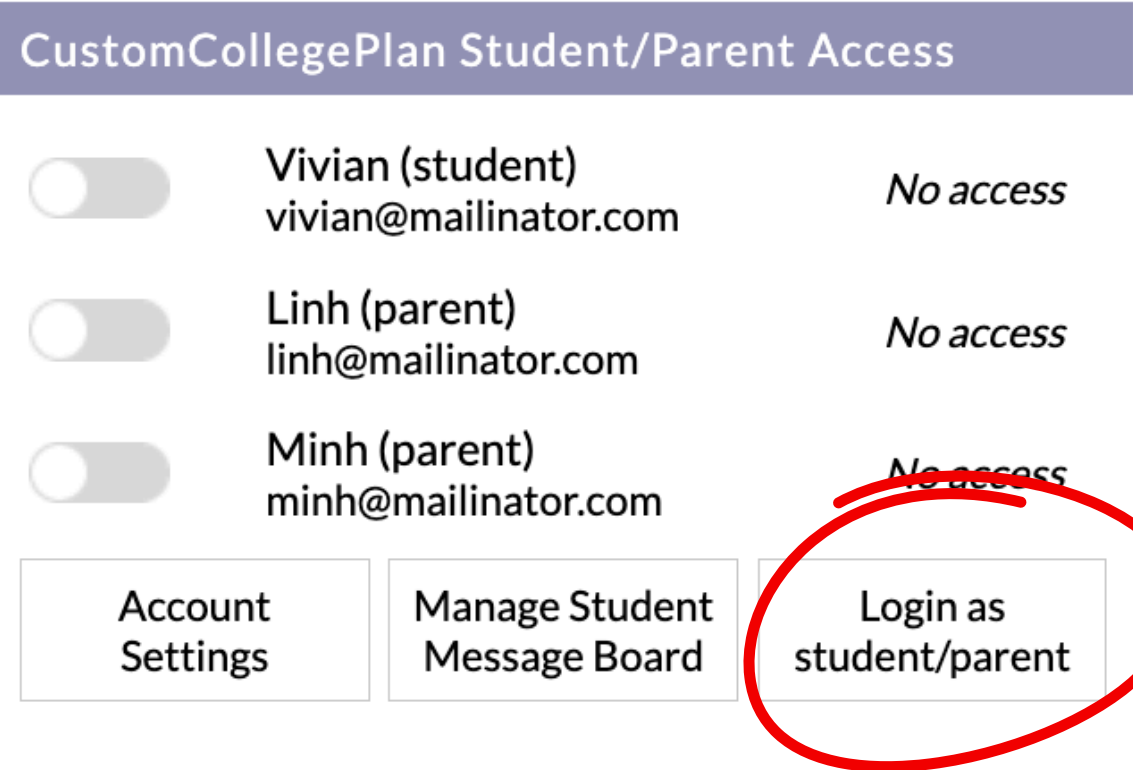
Open your student’s Account Settings. Make sure the Application Outline is set to visible and all other settings are set the way you’d like them.



Log in as Student

[How to login as student](#)

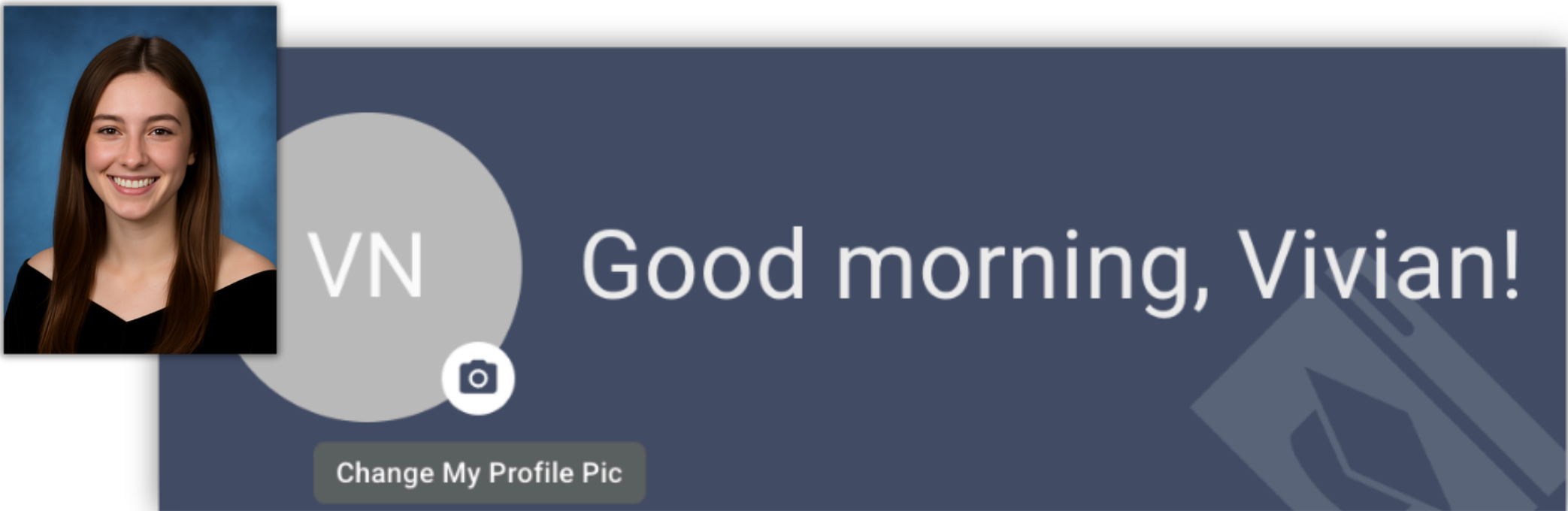
Access the account as your student to test the experience.



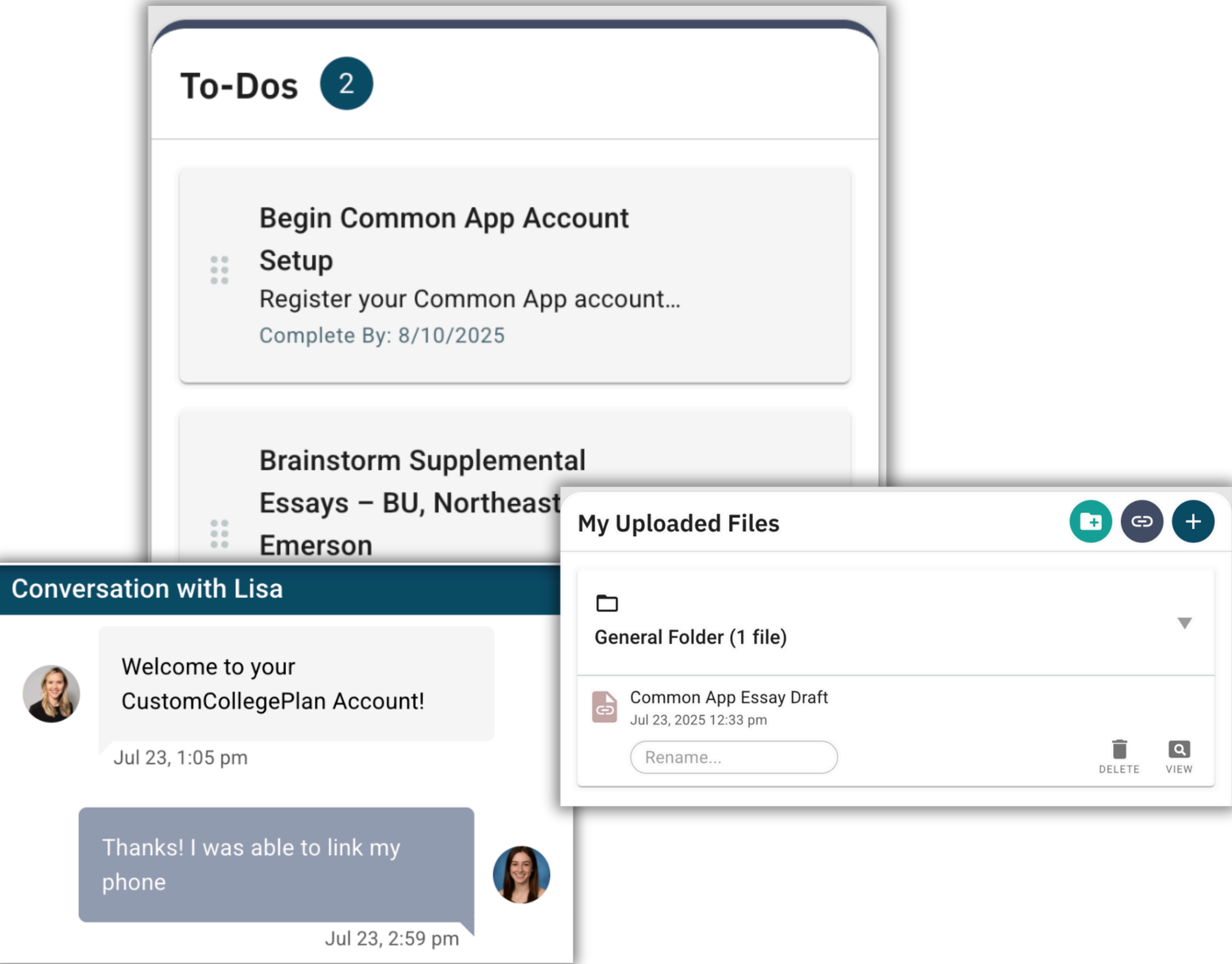
Add a Photo

[How to add a student photo](#)

Click the pencil icon in the welcome banner to upload a profile photo—have fun and match the sample name you chose.



Step 4: Role play as your sample student



Update To-Dos

[How a student creates a to-do](#)

Change a To-Do’s status by opening it or dragging it to a different column. You can add student created To-Dos and add comments to existing To-Dos.

Upload Files

[How do students add files](#)

Upload files as your student. Vary the types of files that you add (e.g., PDFs, Google Docs) and give clear, descriptive titles.

Start a Conversation

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

Build “My List” of Colleges

[How to add colleges to the "My list" of colleges](#)

From the student’s Colleges tab, move the schools that you added application requirements for over to the student’s “My List” of Colleges.

CustomCollegePlan (Student Portal) Resources

Let's Show Her Off

Now that you've created a well-rounded sample student, put it to work! Use this profile during prospective family meetings to walk through the student-facing portal and highlight the value you bring. Show how students stay organized with to-dos, meeting notes, file sharing, and real-time communication, all in one place. Be sure to showcase a college profile and explore the depth of information available to students, including admission data, the Fiske Guide, and essay requirements.

Speaking through your sample student allows you to demonstrate your personalized approach while positioning the platform as a powerful tool that enhances the counseling experience for both students and parents.



Tips for using AI to create your sample student profile

Coming up with creative fictional families and realistic data can sometimes feel overwhelming, especially if you're still figuring out your preferred workflow or haven't worked with many students yet. Tools like ChatGPT can help spark ideas and generate creative, yet realistic, content for your sample student profile.

Use AI to brainstorm names, simulate meetings, create task lists, and even generate suggested colleges. These prompts will help you fill out your profile in a way that feels authentic and tailored to your counseling style.

Here are some suggested prompts to get you started:

- **Start with an Introduction:** *"I am an independent college counselor who is exploring and setting up a new student management software platform. As part of my exploration, I'd like to create a realistic sample student to load into the platform. I would like your help creating this sample student."*
- **Fictional Family Setup:** *"Can you give me five fictional family options to choose from? Each family should include two parents and at least one high school-aged student. The names can be made up or inspired by pop culture."* Pro Tip: If you have a specific theme in mind, include it in your prompt. For example: *"I grew up in the 80s and want a fun, pop culture-inspired family from that time period."*
- **Sample Meeting Notes:** *"Can you write sample meeting notes for meetings I could have had with [insert student name] on May 7, June 4, and July 2? The student is a rising senior."*
- **Student Task List:** *"Based on the meeting notes for [insert student name], can you create a sample list of To-Dos the student would have been assigned?"*
- **Academic Profile:** *"Please give me a realistic sample GPA (weighted and unweighted) and ACT scores from two different test dates for [insert student name]."*
- **Suggested College List:** *"Given the GPA, test scores, and meeting notes, can you suggest a realistic college list for [insert student name] that includes a mix of reach, target, and likely schools?"* Pro Tip: If you work regionally or specialize in certain types of colleges, include that in your prompt.
- **Headshot Image:** *"Can you generate a sample yearbook-style headshot for [insert student name]?"*
- **Application Requirements:** *"Can you create application requirement tasks for three of the colleges on [insert student name]'s list?"*

