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The COVID-19 Education Response Playbook

A Guide for How to Lead and Build Resilience
for the Next Normal



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Foreword



We hope this finds you and your school community healthy and safe. This pandemic impacts every education institution, reminding us that we're all truly connected in our mission to drive learner and institution success. Thank you for the work you do every day to support learners, families, faculty, and staff - your resilience and dedication to your communities inspires us.

[At Salesforce.org, we're working tirelessly to leverage our resources, relationships, and products to help navigate this crisis together.](#)

For education leaders like you, we're collaborating with our customers and partners in every region to make sense of this crisis and discuss how education institutions can respond effectively during this time. We're bringing our education customers together in the **Power of Us Hub** to share best practices, meeting virtually through digital events like **Higher Ed Summit**, and extending support to education leaders across the globe through our customer **advisory councils**.

This playbook presents a simple, organized way to **identify the key decisions** you can make now that will prepare your institution as you **Stabilize, Reopen, and Evolve** for the future – through accelerated digital transformation and a focus on lifelong learning. Use this versatile guide to assess where your institution is today, as you outline specific actions you can take in the next normal to become more resilient.

We look forward to hearing your story and supporting your institution throughout the reopening journey.

A handwritten signature in black ink that reads "Nathalie Mainland". The signature is written in a cursive, flowing style.

Nathalie Mainland
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Introduction

From shifting to remote learning to providing meals to students in need, education institutions are leading through change and supporting their communities in unprecedented ways. In fact, getting our communities back to work is going to rely heavily on when students, faculty, and staff can return to school. The Education Cloud team is here to help institutions on their reopening journey with tailored solutions, insights, and advice every step of the way.

Reopening will be a different journey for every institution. Having a framework to guide you along that journey is a key first step. Based on the advice of global experts and the real experiences of our customers and partners, **Salesforce.org** has developed this response playbook for education institutions. The phased approach outlined in the next few chapters will help you gain greater clarity as your teams **Stabilize, Reopen, and Evolve** to support your entire community.

How can you make key decisions today as the next normal unfolds? Use this playbook to map your institution's response journey and support day-to-day decisions at the speed and scale now required to drive learner and institution success.

There Is Enormous Economic Uncertainty

Pace of economic recovery may span 18 months to 3 years, with several possible trajectories.

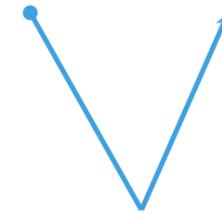
In addition to not knowing how the virus will progress, we are all operating in a time of massive economic uncertainty.

Research identifies four models of potential economic outcomes. However, no model fits every region, which only adds to the uncertainty.

Consider these outcomes as your institution develops scenario planning.

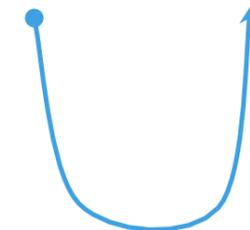
V-SHAPED

A V-shaped recovery with a possible short-lived boom driven by huge stimulus needed for a hard stop to the pandemic.



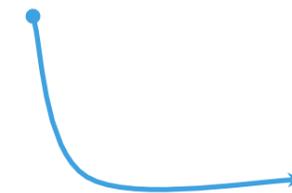
U-SHAPED

A U-shaped recovery based on a longer crisis driven by a more modest response to the pandemic.



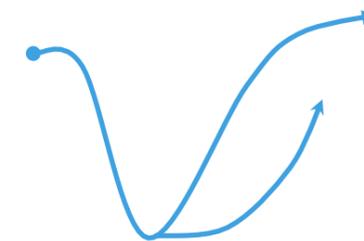
L-SHAPED

An L-shaped non-recovery of a decay into depression driven by failed responses to the pandemic and economic crisis.



Y-SHAPED

A Y-shaped recovery is a combination of U- and L-shaped recoveries – in this (likely) case, the economy divides into two tracks: slow and fast sectors.



What Is the Best Path to the Next Normal?



We all left the old normal behind when we were asked by our leaders to stay in our homes. Now we find ourselves in the new normal of COVID-19. And, the big question remains: What will the next normal look like?

One thing we do know is that we will never return to the old ways of driving learner and institution success. The crisis accelerated digital transformation in ways that will change the way we work and educate for years to come.

THIS MEANS EDUCATION LEADERS NEED TO ASK FOUR CORE QUESTIONS:

- How and when do I help faculty, staff, and learners return to school?
- Do we need to reimagine how we engage with learners and families?
- Will my faculty and staff have the right skills for the next normal?
- Is my institution set up to handle any future crisis?

You can't do everything at once – so consider the phased approach we explain in the next section.

A Structured Approach Mapped to Your Readiness

We found that taking a structured approach – divided into three distinct, yet often concurrent, tracks – helps guide and simplify decision-making.



Structuring Your Approach

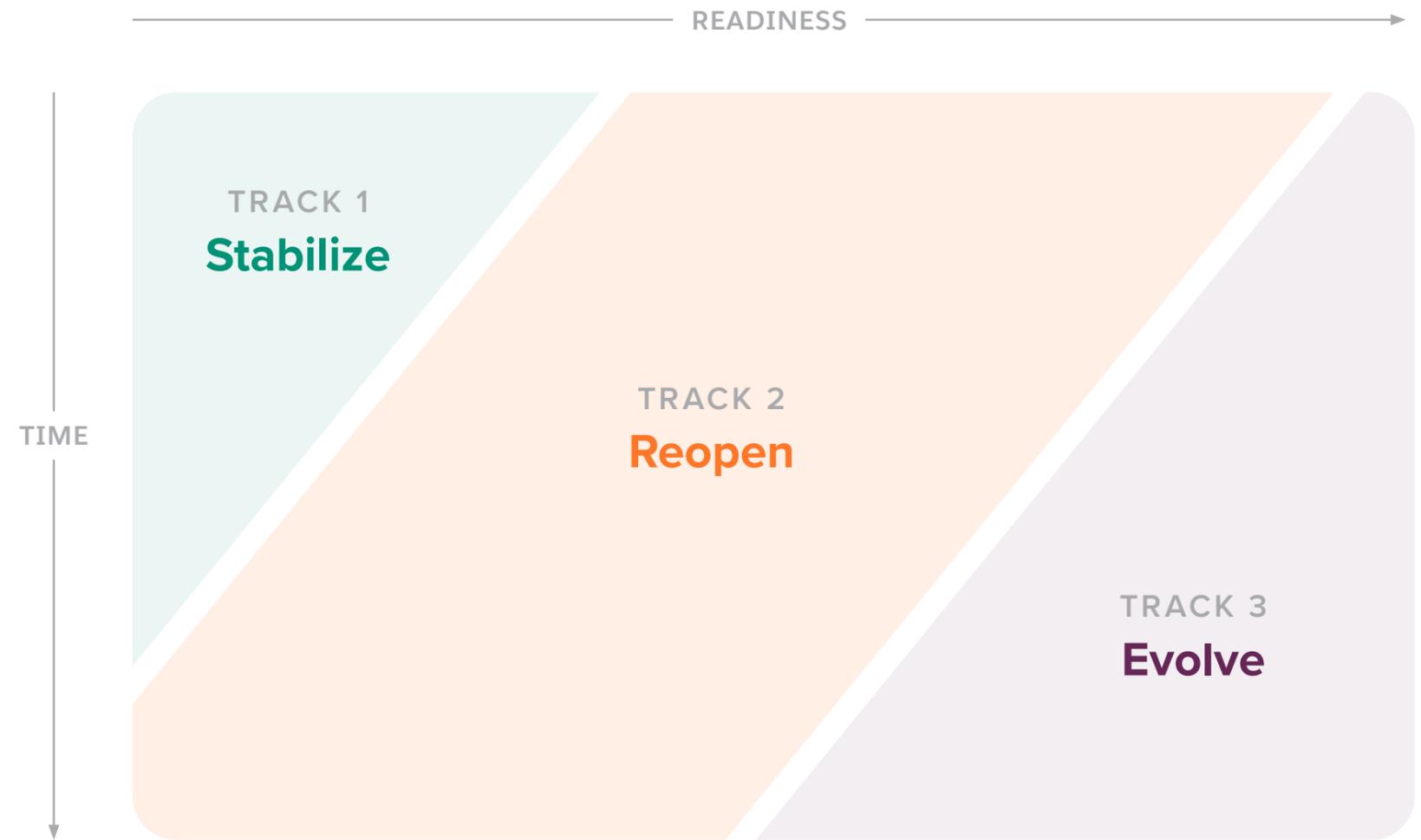


Institutions May Operate at Different Speeds

Every education institution will operate at a different pace. Even within your school or university, it's possible for one department or team to be within its own track.

For example, one institution may be struggling to stabilize because its leaders don't have easy information access or processes to make fast operating decisions to drive digital-first engagements. In those cases, teams will spend more time stabilizing before embarking on a journey to return to school.

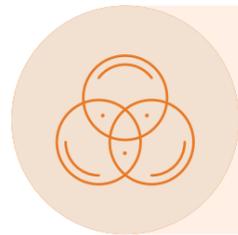
On the other hand, some institutions will already be well into an evolve phase because they were originally established as online universities or were able to quickly pivot to accelerate their digital transformation.



Four Learner-Centric Capabilities

Salesforce can help you bring a learner-centric mindset to your approach. Consider how you evolve these four capabilities below to improve your crisis response and resilience. Each further reinforces your learner-centricity, empowering your institution to come together to support the entire learner community including faculty, staff, and families. Salesforce is uniquely able to help you in each of these areas.

Now that you have a clear view of the three tracks, the next step is to break each track into much more granular actions you can take.

	<p>How You Make Decisions</p>	<p>→ Accelerated and delegated decision-making Establishment of a data culture Structured planning (scenarios, data modeling)</p>
	<p>How You Work & Educate</p>	<p>→ Physical and psychological safety Stabilization of internal communications and productivity Establishment and evolution of new ways of working and learning</p>
	<p>How You Engage Lifelong Learners</p>	<p>→ Deeper personalization to engage every type of learner at your institution Redesign of virtual student experiences and offers based on new needs Empower learners and families via digital-first experiences and personalized journeys</p>
	<p>How You Engage Society & Community</p>	<p>→ Effectively engage corporate partners to support work-based learning programs and job-seeking students Engage with your alumni community to get involved and give back Community and nonprofit partnerships to serve all learners and families in need</p>

Where Are You in Your Response Journey?

In evaluating their own crisis response, customers have found it helpful to consider the three tracks by breaking them down into the four learner-centric capabilities.

Follow this approach to ensure you structure your response around your learners.



How You Make Decisions



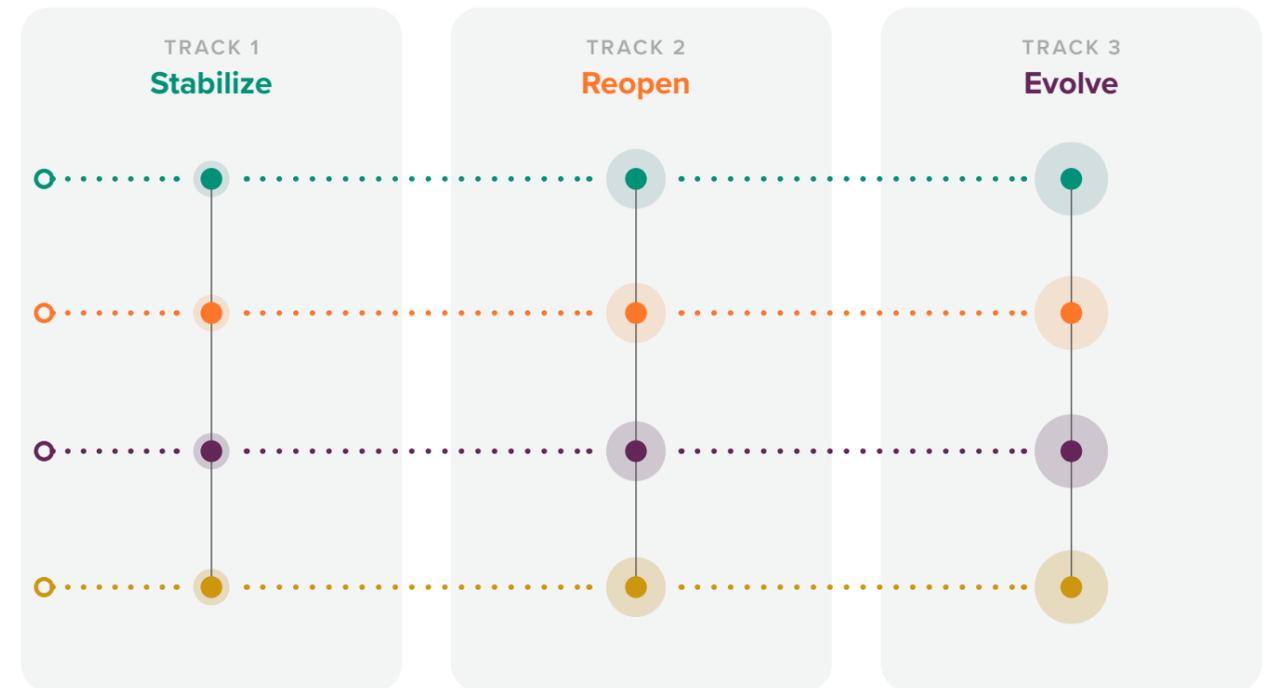
How You Work & Educate



How You Engage Lifelong Learners



How You Engage Society & Community



Use this framework to reflect on the strongest areas of your crisis response and where you need to make significant progress.

You may wish to pursue all three tracks at the same time by assigning task forces within your institution, but you need to make important decisions in each track to ensure a smooth transition from one to the next.

Get more details on what's needed for each track in the next three chapters.

TRACK 1

Stabilize

The crisis may be unfolding around you. This stabilize track is about protecting your faculty and staff and running your institution as best you can amidst those challenges.

As a leader, you likely began responding by setting up a dedicated crisis response team to define options, risks, and actions across schools, campuses, and departments.

Your stabilize plan should include how you make decisions, how you work, how you engage learners, and how you drive community impact.

Overview of Recommendations

Review this graphic for a high-level overview of what your stabilize priorities should be for each learner-centric capability. Then, for each capability, see its checklist for considerations and possible actions to take with your leadership team.

MITIGATE SHORT-TERM RISKS AND STABILIZE OPERATIONS



How You Make Decisions

Establish a crisis command center.

Establish stabilization team, war room, and plan. Gather the right insights (data, feedback, and scenarios) to plan and iterate your response.

Make swift decisions to drive learner and institution success.

Re-prioritize efforts, focusing time and resources on new urgencies, reinforcing key initiatives with sufficient bandwidth.

Establish a data culture across the institution.

Build and distribute reusable datasets and dashboards to enable faster decision-making while building a data culture.



How You Work & Educate

Define and execute the stabilize work plan.

Define and communicate the work plan, making it easy to provide feedback; reinforce leadership transparency and visibility.

Increase faculty and staff productivity.

Ensure remote connectivity; streamline workflows and automate overly inefficient processes; implement training for new tools and processes.

Support faculty and staff wellness.

Supercharge your faculty and staff help portal with information to clarify faculty and staff support programs and resources; create cadence of insights and advice to faculty and staff.



How You Engage Lifelong Learners

Rapidly engage learners, families, and alumni.

Make it easy for learners, families, and alumni to reach you digitally; prioritize outreach based on needs; analyze changing needs.

Realign value propositions to learner priorities.

Rapidly innovate offerings and messaging to better serve immediate learner needs.

Optimize your digital engagement model.

Increase performance of existing digital programs to generate scale and response effectiveness.



How You Engage Society & Community

Prioritize goals and shift resources to support lifelong learning.

Assess if there are new needs in the community that your institution can meet.

Enhance nonprofit and corporate partnerships.

Communicate with nonprofit and corporate partners about your resilience plan and the part they can play in helping learners and their families.

Communicate transparently, track impact, and iterate.

Clearly communicate how your institution is a platform for change; advocate for community-driven conversations as well as State and Federal support.

How You Make Decisions

Making decisions occupies a majority of your time as a leader. There’s no silver bullet to make those decisions easier – your choices significantly impact learners, families, faculty, and staff. But if you focus your decision-making around swift, insight-driven decisions, you can redirect your institution’s resources to the most critical areas of your COVID-19 response.

Establish a crisis command center.

- Establish stabilization team and war room** to focus information gathering and decision-making.
- Create a “Stabilization” V2MOM** to align around a single response strategy at the institution leadership level.
- Develop action plans** across (i) faculty and staff, (ii) learners, (iii) institution operations.
- Build intelligence dashboards** to simplify and accelerate decision-making.
- Model scenarios** – financial, institution operations, lifelong learning.
- Capture feedback** from faculty & staff, learners, families, alumni, and partners.

Make swift decisions to drive learner and institution success.

- Prioritize, realign, and repurpose** leadership time and resources according to new urgencies, reinforcing key initiatives with sufficient bandwidth.
- Implement cost controls**, cut nonessential expenses, and identify new revenue streams.
- Stop nonurgent initiatives** to avoid distraction.
- Put in place and manage contingency plans** for disrupted learners, faculty, staff, and operations.

Establish a data culture across the institution.

- Build and distribute reusable datasets and dashboards** to enable faster and better data-driven decision-making across the institution.
- Manage data throughout the entire learner lifecycle** to drive more personalized engagements from prospect to alum.
- Build accountability performance matrix** to enable a total view of the institution and across campuses and departments.
- Build deeper analytics models** of changing learner needs and identify new decision variables.

V2MOM Approach

The [V2MOM](#) is a simple framework for alignment and leadership. It focuses on these five questions:

Vision: What do you want to achieve?

Values: What’s important to you?

Methods: How do you get it?

Obstacles: What is preventing you from being successful?

Measures: How do you know you have it?

How You Work & Educate

Use this time to develop and execute a plan to support your faculty and staff’s wellbeing, while ensuring they can stay productive in new environments. Prioritize their physical and psychological safety. You’ll likely have to rethink processes, tools, and technology as you evolve your traditional ways of working and teaching.

Define and execute stabilize work plan.

- Create “Crisis Taskforce and Response” V2MOM** focused on faculty and staff safety, productivity, and wellness.
- Segment faculty and staff** to enable clear and targeted communications.
- Clearly communicate the plan**, tailored to each segment, ensuring steady and frequent situation updates, new policies, and guidance.
- Make it easy to provide feedback**, through multiple, low-friction channels (respond to faculty and staff questions, feedback, and ideas).
- Reinforce leadership visibility and transparency** with regular virtual all-hands meetings.

Increase faculty and staff productivity.

- Ensure connectivity** for remote faculty and staff with secure email, VPN, and web conferencing.
- Streamline workflows and automate inefficient human processes** (billing, class changes, etc.) to remove friction.
- Implement training for new tools and processes**, including decision support and virtual collaboration.
- Provide tips and training on how to best communicate with learners and colleagues** (e.g., build empathy and active listening).

Support faculty and staff wellness.

- Clarify assistance programs and resources** available to faculty and staff (childcare, financial planning, mental health).
- Create regular cadence of storytelling** with insights and tips from faculty and staff, learners, families, alumni, and partners.
- Establish faculty and staff help portal** to provide access to all services (IT, HR, finance, etc.); identify and prioritize new offerings based on query analytics.

How You Engage Lifelong Learners

Even as you're stabilizing your institution, you can connect with and support learners, families, and alumni. Establish where and how you're available to communicate with them, and consider introducing new services that will especially help in their new context.

Rapidly engage learners, families, and alumni.

- Set up remote call center** to respond to increased inbound learner and family questions.
- Listen at scale to learners, families, and alumni through digital roundtables** to learn emerging needs and share information and updates.
- Leverage service case data** to identify learner and family experience improvements.
- Define and publish FAQ pages** for all constituents.

Realign value propositions to learner priorities.

- Rapidly deploy services** to better meet immediate learner and family needs.
- Shift messaging** to be more human, empathetic, and personalized to crisis needs.
- Cocreate institution continuity plans** with faculty, staff, and learners to streamline operations and gather essential feedback.

Optimize your digital engagement model.

- Increase performance of existing digital channels** to generate greater scale and response effectiveness.
- Focus human effort on highest-need cases**, using self-service channels, predetermined traffic routing rules, and automation.
- Monitor social channels** and respond quickly to real-time conversations.

How You Engage Society & Community

Your institution plays a pivotal role in serving your community during tough times. As part of your stabilizing motion, determine and communicate how your institution can best give back to support families, underprivileged learners, and those looking to reskill or upskill. Consider tangible resources as well as faculty and staff time for volunteering.

Prioritize goals and shift resources to support lifelong learning.

- Build an “Engage Society & Community in Crisis” V2MOM**, defining focus areas and priorities.
- Assess for unmet community needs** to serve lifelong learners, adults out of work, corporate partners, nonprofits, etc.
- Centralize donation and grant management** to maximize impact for lifelong learners and reskilling/upskilling.
- Establish learner support program** to match learner needs to various support networks from your institution.

Enhance nonprofit and corporate partnerships.

- Focus faculty and staff giving** on providing assistance to nonprofits that support lifelong learners, adults out of work, and underprivileged students facing food or housing insecurity.
- Update volunteering protocols** to align with institution values.
- Create partnerships** with other trusted nonprofits/corporate partners to scale community impact.
- Crowdsource ideas** by opening a request or help line for how best to help.

Communicate transparently, track impact, and iterate.

- Clearly communicate** how your institution will be a platform for positive change in the crisis.
- Create an “impact dashboard”** to monitor and analyze community support with real-time data.
- Support faculty and staff resource groups** with guidance for attracting talent and resources aligned to their values.

TRACK 2

Reopen

Your initial response to COVID-19 is about stabilization. Then, it's time to set the wheels in motion to reopen your school or university.

Even as you're mobilizing different teams to reopen – from institution operations to IT to learner success – you're also preparing for the possibility of another outbreak and shelter-in-place or lockdown period.

Listening is a key muscle to flex in this track. Ask your team to listen through surveys and one-on-one meetings with learners, families, faculty, and staff. Translate insights into action and extend that knowledge through your entire ecosystem of community leaders including local nonprofits and corporate partners.

Overview of Recommendations

Review this graphic for an overview of what your reopen priorities should be for each learner-centric capability. Then, for each capability, review the checklist for considerations and possible actions to take with your team.

PLAN AND ORCHESTRATE A CONTINUATION OF LEARNING



How You Make Decisions

Establish an institution command center.

Build a reopening team and mobile command center; gather key data to help with planning; partner with local community leaders to resolve tough questions.

Build reopen plan.

Build a unified reopen plan, defining mobilization, logistics, and support; define overall school campus and institution policies, especially around COVID-proofing and containment reactivation.

Unify reopen feedback and decision-making.

Instrument the return to learning and school campus with a single source of truth, augment insights through multiple feedback loops, and communicate liberally.



How You Work & Educate

Execute staged reopen plan optimized for safety.

Monitor state and federal requirements and adjust your reopen plan with contact tracing, shift management and planning, faculty and staff wellness checks, and school sanitation.

Enable faculty and staff with tools for your reopen environment.

Activate multiple channels for faculty & staff to get information (portals, training), provide feedback (surveys), and get help (wellness tools).

Return to school with greater flexibility.

Enable increased work flexibility, including staggered shifts; take account of parental needs; optimize hiring and skills decisions.



How You Engage Lifelong Learners

Deeply understand changing learner needs.

Deepen listening programs to identify evolving learner needs.

Rebuild trust through personalized experiences.

Redesign simpler, more personalized, and more automated experiences; enable learners through self-service portals.

Cultivate robust learner resilience.

Deepen learner relationships through personalized messages, consistent communications, and flexible tools to meet their evolving needs.



How You Engage Society & Community

Demonstrate empathy within your community.

Empower and enable teams to serve local needs and form local partnerships; invest in and communicate impact locally and transparently.

Operationalize your community-centric culture.

Establish programs for alumni and volunteer engagement across the globe. Explore new corporate and nonprofit partnership opportunities.

Double down on equitable access to education.

Confirm learners have access to the technology and tools needed to have equitable access to education.

How You Make Decisions

Your decision-making in this track should focus on the new, evolving needs of learners, families, faculty, and staff as well as community partners. Get ready, because your leaders will have a lot of questions. Be proactive by setting up a command center and designing a data-driven plan to get everyone back to school safely. Think holistically to ensure you're accounting for all voices and feedback.

Establish an institution command center.

- ❑ **Engage institution command center** to coordinate people, policy, and health data management dashboards, and collaboration feed as a single source of truth.
- ❑ **Keep up to date with regulatory requirements** for social distancing, school safety, and testing protocols.
- ❑ **Define data sources (existing and new)** to enable optimal decision-making, including faculty, staff, and learner health, physical density, and sanitation status.
- ❑ **Enable advanced data modeling** (scenario planning, what-if analysis, and risk modeling) with dashboards, public datasets, and internal faculty and staff/learner/site data.
- ❑ **Engage with medical advisor** (or expert sources) to monitor and visualize virus progression as shelter orders lift.

Build a reopen plan.

- ❑ **Build a unified plan** for cascading notifications, work plans, and effort needed to activate a safe return to school.
- ❑ **Define mobilization, logistics, and support plan** that's inclusive of state and federal requirements, including COVID-proofing, testing tool procurement, move sequencing, and space management (e.g., target faculty, staff, and student density across campus, labs, and student social areas).
- ❑ **Define health attestation requirements** and process, including contractor and visitor policies.
- ❑ **Define target reopen operating model at campus/school**, modeling potential scenarios on learners/institution operations/faculty and staff impact.
- ❑ **Define phased containment plan** in case of localized lockdown reactivations.

Unify reopen feedback and decision-making.

- ❑ **Instrument the return to school** with a single truth view of all critical data, including faculty, staff, and learner segmentation, schedules, and completion.
- ❑ **Collate feedback and insights** from faculty and staff, learners, families, alumni, and partners and synthesize into improvement opportunities and shareable insights.
- ❑ **Ensure timely, trusted cadence of updates** to all parties: faculty and staff, learners, families, alumni, and partners.

How You Work & Educate

This is where faculty and staff across departments will start to see your new plan take shape. Execute your reopen plan with the right tools and processes, ensuring faculty and staff safety and work-life balance. Greater flexibility for faculty and staff members, including parents, is key to your institution’s return to school – and so are multiple channels and tools for faculty and staff to get information.

Execute staged reopen plan optimized for safety.

- Review and adopt new faculty and staff protection regulations** in alignment with government policies and healthcare experts.
- Redesign your school environment** using new health and safety best practices (hallways, elevators, classrooms, etc.).
- Use shift management and planning** to align faculty and staff shift schedules to meet new social distancing standards.
- Execute faculty and staff manual contact tracing process** optimized for security and privacy of personal health data.
- Operationalize school sanitation practices** in classrooms, offices, hallways, bathrooms, staff rooms, etc.
- Execute faculty and staff attestation process**, including wellness certification and tracking.

Enable faculty and staff with tools for reopen environment.

- Activate faculty and staff portal** with up-to-date resources and policies.
- Use faculty and staff surveys** to automate individualized employee work-from-home and assistance communications.
- Adjust onboarding and training** based on new ways of working, teaching, and using facilities on campus.
- Establish hotline for “see something, say something ” and inquiries** via phone, web, text, internal social feed.
- Establish travel advisory** to enforce policy, advise, monitor, and track all travelers.
- Support mental health needs** with faculty and staff wellness apps and enhanced counseling services.

Return to school with greater flexibility.

- Enable increased work flexibility**, including ramping up or staggered classes, advising appointments, and lab time.
- Align on faculty and staff child care needs** to support employee at-home needs with reopen schedule.
- Centrally review new skills and roles needs** based on market changes.
- Explore overall best hiring options** (hiring, reskilling, contractors, student jobs, etc.).

How You Engage Lifelong Learners

How you engage learners starts with listening. Invest in understanding your learners' new realities – the work will pay off later. Partner with your broader ecosystem including corporate and nonprofit partners to deliver experiences together that meet learners' evolving needs. Personalize experiences and communication across the entire educational journey at scale.

Deeply understand changing learner needs.

- Capture evolving learner needs** through programmatic focus groups and learner advisory boards.
- Capture shifts in how learners want to engage**, including learning trends, new service experience and technology needs.
- Evolve data strategy based on new data requirements** to ensure safe physical learner experiences.
- Establish ethical use advisory board** and guidelines to govern health and other sensitive data usage.

Rebuild trust through personalized experiences.

- Support virtual advising** appointments to help learners navigate their education goals and priorities.
- Make it easy for learners and families to find information** they need to make decisions through digital one-stops and chatbots.
- Foster connections** with tailored learner and family communities.
- Prioritize automation** to replace inefficient human processes (billing, class schedules, etc.).
- Drive personalized communications** at scale for every phase of the learner experience as it shifts with the current climate.

Cultivate robust learner resilience.

- Enable increased learning flexibility**, including ramping up or staggered classes and lab time.
- Cultivate online learning** for continued remote instruction and focus on access for all learners.
- Support mental health needs** with learner wellness apps and enhanced counseling services.

How You Engage Society & Community

Empathy and a culture focused on equitable access to education starts at the leadership level. Enable and empower faculty and staff to serve society as you reopen and emerge from crisis. Support your local community and give back through volunteering, resources, and more. And reconsider your institution’s social impact in everything you do post-crisis to support lifelong learning.

Demonstrate empathy within your community.

- Locally identify community needs** and broadcast how to help.
- Make it easy for local nonprofits and corporate partners to coalesce** with your institution to serve learner needs.
- Form local partnerships** with other schools, universities, corporate partners, and other critical community organizations.
- Invest in reskilling and upskilling your community** by providing free training and guidance on market relevant skills.
- Communicate your impact locally and transparently**, truthfully, and with compassion.

Operationalize your community-centric culture.

- Programmatize volunteer management** to match volunteers/alumni with organizations, track volunteer hours, and report impact.
- Expand gift management program** to focus on community impact and equity in education.
- Sense and respond to new ideas** from faculty and staff to refresh ways to serve, volunteer, and donate.
- Commit to providing career development opportunities** for lifelong learners or those who have lost their jobs as the economy recovers.

Double down on equitable access to education.

- Establish equity as a key decision factor** in all post-crisis investments, including learner resources, technology, and more.
- Rethink your geographical centers** and consider opening in “second (or third) cities” to close equity gaps across education.
- Share data responsibly for good** with trusted global organizations focused on societal change.

TRACK 3

Evolve

Once operations are stabilized and your school or university has reopened, you can focus on how to evolve your institution. In this track, you accelerate change to grow in the next normal.

As a leader, this is where you get the opportunity to drive a growth agenda and come out of this crisis even stronger. Make your vision a reality by assembling the right team – we call it a next-normal transformation office.

This will be your go-to team as you create an engaging faculty and staff experience, drive learner-centric engagements, and shape your institution into a platform for change.



Overview of Recommendations

Review this graphic for an overview of what your priorities should be as your institution evolves. Then, for each capability, review the checklist for considerations and possible actions to take with your team.

ACCELERATE CHANGE TO THRIVE IN THE NEXT NORMAL.



How You Make Decisions

Establish a next-normal transformation office.

Create Office of Digital Transformation; publish president- or provost-level vision as True North; align leadership.

Define the target digital operating model.

Build target digital operating model to unify IT and institution leadership with a clear digital governance model; unlock value of data; automate for speed.

Continuously anticipate change and respond with agility.

Define and enable business performance matrix, including new KPIs for experience; augment gathering of learner, faculty, and staff feedback.



How You Work & Educate

Supercharge faculty and staff productivity.

Leverage industry best practices, simplify finding answers, enable faculty and staff collaboration, and automate onerous processes.

Enable faculty and staff development.

Empower faculty and staff with opportunities to enhance their skill sets including developing new learning models and evolving teaching methods to align with learner needs.

Foster a faculty and staff-friendly workplace and culture.

Create multiple avenues for faculty and staff feedback; enhance focus on community and work environment; evolve wellness resources to focus on mental wellbeing.



How You Engage Lifelong Learners

Redesign institution processes to be learner-centric.

Audit and redesign institution processes to differentiate based on speed and simplicity in serving the learner experience; evolve business models to find new revenue streams.

Enable the full power of your institution.

Empower your institution to become a connected campus/school with a single source of truth to personalize the learner experience at every stage of the educational journey.

Accelerate your digital transformation.

Innovate quickly to evolve with the changing needs of learners, enabling the institution to deploy new digital capabilities at speed.



How You Engage Society & Community

Drive lifelong learning at scale.

Measure and report your societal impact as learners are reskilling and upskilling.

Be a platform for change in the world.

Orchestrate action to engage alumni, faculty and staff, and corporate partners around the Sustainable Development Goals (SDGs); spotlight heroes to generate momentum.

Triple down on equity and inclusion for the long term.

Appoint a chief equity officer; and invest in a strategy toward inclusive excellence and equitable access to education through institutional transformation.

How You Make Decisions

In the next normal, your transformation office will help bring your vision and strategy to life. Establish a V2MOM to drive alignment around that strategy. V2MOM stands for vision, values, methods, obstacles, and measures, and it's a valuable way to make sure key milestones are actually hit on your journey to high-impact change.

Establish next-normal transformation office.

- Create an Office of Digital Transformation and V2MOM** to drive institution alignment around the next-normal strategy.
- Publish a president/provost/superintendent-level digital transformation vision** to align everyone on the mission and overall target outcomes for transformation.
- Audit and reimagine priority learner, faculty, staff, and partner experiences** to increase relevance, simplicity, and speed.
- Build business cases for high-impact change** across faculty and staff, learners, families, alumni, and partner experiences, new ways of working, and core operations.
- Evaluate new revenue models** across the university or school.

Define the target digital operating model.

- Align IT and the institution around the target digital operating model** that will bring the president, provost, or superintendent vision to life.
- Create a single institution digital governance model** that underpins the digital operating model.
- Unlock the value of data** through a “build once, reuse infinitely” API network model.
- Automate** decision-making for greater speed, especially for known work patterns.

Continuously anticipate change and respond with agility.

- Define and instrument an institution performance matrix** to enable a complete view of the institution across every department, school, and campus.
- Define and instrument next-normal KPIs** around the faculty and staff, learner, family, alumni, and partner experience.
- Augment anticipate and respond capabilities** to extract insights from learners, families, faculty and staff using surveys, learner value data, and other sources.
- Extend data and insights** to nonprofit, community, and corporate partners.

How You Work & Educate

Your institution's mission and values are how you'll build a path forward. Closely evaluate to see where you can better enable your faculty and staff in the next normal. Optimize for productivity while building an environment of learning, community, and wellness. Now's the time to be more open toward remote and flexible work options.

Supercharge faculty and staff productivity.

- Leverage global growth industry best practices**, (e.g., onboarding, time to effectiveness, faculty and staff alignment).
- Simplify finding answers** for faculty and staff through multichannel knowledge base activated with bots.
- Enable department leads to build powerful apps** across the institution through low- and no-code platforms and to augment teams with design expertise.
- Automate processes across front, middle, and back offices** to drive speed, simplicity, and cross-team collaboration.
- Personalize faculty and staff journeys** with contextual, relevant information and recommendations.

Enable faculty and staff development.

- Equip faculty and staff with a skills profile**, enabling institutionwide skills analysis and optimized opportunity matching.
- Simplify learning for must-have skills**, enabling fast and easy upskilling to support digital transformation and new ways of working/educating to match learner needs.
- Upgrade reskilling** with needs assessment, tailored online learning journeys, and career opportunities.
- Source for diversity** and reexamine job descriptions to ensure qualification requirements attract diverse candidate pool.

Foster a faculty- and staff-friendly workplace and culture.

- Create multiple avenues for faculty and staff feedback** to increase transparency and enable fast improvement (surveys, social channels, etc.).
- Evolve new working practices** with a focus on community and lifelong learning.
- Evolve health and wellness resources** to address faculty and staffs' shifting physical and mental needs.

How You Engage Lifelong Learners

Learner-centricity was the name of the game before COVID-19, but now, it's even more critical. Focus on learner-centricity by redesigning processes around your learners, not your silos or departments. Innovate along with your external partners, who can help you scale and reach new learners. You've never been closer to unlocking the full power and potential of your institution.

Redesign institution processes to be learner-centric.

- Systematically audit learner moments based on “job to be done”** to identify pain points and differentiation opportunities.
- Design and enable learner journeys at scale**, using self-service channels, predetermined traffic routing rules, and automation.
- Streamline key learner touchpoints** throughout the educational journey such as onboarding and issue resolution to increase speed and reduce effort.
- Leverage best practices from other industries** to improve faculty and staff effectiveness in serving learners.

Enable the full power of your institution.

- Create single source of learner truth** to put all institution departments on the same page by aggregating multiple data sources.
- Design and execute learner experience journeys** with rules- or AI-triggered next best actions for speed and simplicity.
- Enable corporate and nonprofit partners** to see real-time learner data to optimize their relationship with you.
- Reconceive your institution as a platform**, enabling your corporate and nonprofit partners to serve your learners at scale.
- Train and enable faculty and staff** for new learning environments: reporting and analytics, prioritization, and new communication and collaboration expectations.

Accelerate your digital transformation.

- Leverage learner service case data** to identify highest-priority improvements and investments.
- Supercharge learner listening** via idea portals, surveys, and learner listening tours.
- Empower departments across the institution** to accelerate digital efforts closer to learner needs.
- Develop reusable processes and components (datasets, APIs)** to accelerate application development through maximum reuse.

How You Engage Society & Community

Equality begins with education. In the next normal, commit to ongoing service to your community through volunteering, strategic partnerships, and giving back. Consider appointing a chief equity officer to triple down on your institution's efforts to drive equitable access to education for the long term. When you speak to faculty and staff, highlight internal successes and heroes to maintain enthusiasm and encourage others.

Drive lifelong learning at scale.

- Formally communicate your societal impact progress** as part of your institution's success metrics.
- Measure and report your impact** to identify current status and overall improvement.
- Establish an Office of Equitable Access** to elevate awareness of and focus on key access considerations for every lifelong learner.

Be a platform for change in the world.

- Identify the areas for institution focus** aligning to the Sustainable Development Goals (SDGs).
- Partner with nonprofit organizations** that support your institution's mission.
- Encourage key institution leaders to lead through example** to foster schoolwide momentum around top initiatives.
- Consider the 1-1-1 model**, codifying a sustainable model for giving time, talent, hard assets, and human resources.
- Devote marketing efforts** to generate initiative momentum and community support.
- Spotlight internal successes and heroes** to encourage others across the institution.

Triple down on equity and inclusion for the long term.

- Appoint a chief equity officer** to orchestrate institutionwide initiatives and maintain focus.
- Define plan to measure equity gaps** and initiate change efforts to achieve goals.
- Support the SDGs**, creating greater institutionwide knowledge and interest in them.

How Salesforce.org Solutions Can Help

At Salesforce.org, Education Cloud is the complete portfolio of Salesforce technology to drive learner and institution success. It enables you to put the learner at the center of everything you do.



Education Cloud

Built on the world's #1 CRM, Education Cloud drives learner and institution success with 360-degree views across the entire educational journey. With one integrated CRM platform for education, your recruitment and admissions, student services, advancement, and operations teams can come together to create personalized experiences at scale – transforming learner engagements into lifelong relationships.

Institutions across the globe are using Education Cloud to accelerate their digital transformation as they Stabilize, Reopen, and Evolve for the future.



SOLUTIONS

Make Decisions



We're here to help your school or university make data-driven decisions at scale. Digital solutions, combined with expert advice and best practices from our community, can help you create a Crisis V2MOM and make swift resource decisions to support your entire institution.

Education leaders can use a Workplace Command Center as a single hub to make informed decisions on how to monitor, adjust, and manage reopening plans across campuses and districts. You can also access trusted COVID-19 global data from our community of experts in the Tableau [COVID-19 Data Hub](#) so you can accelerate decision making and stay informed every step of the way.

1 | ANALYTICS FOR EDUCATION LEADERS

With the Work.com Command Center, education leaders can monitor return-to-school readiness, make data-driven decisions, and communicate more effectively from a single hub.



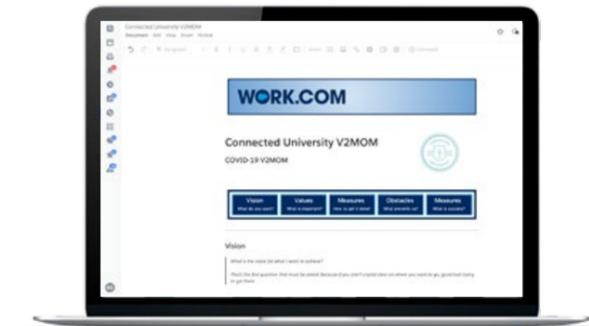
2 | COVID-19 DATA HUB

Jumpstart analysis with publicly available datasets from Tableau's COVID-19 Data Hub.



3 | CRISIS V2MOM

Empower education leaders to build holistic plans using Quip and the Salesforce V2MOM template.



TACTICS

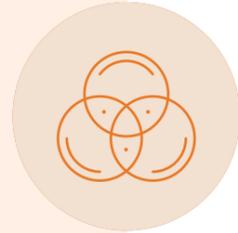
- Crisis V2MOM templates in Quip
- V2MOM exercise
- Automated alerts and triggers based on new policies
- Automated attestation and compliance processes

- Integrate faculty and staff wellness data and demographic data
- Correlate faculty and staff data with institution operations data
- Tableau data visualization (mobile, collaborative)
- Dedicated war room dashboards

- Salesforce Maps
- Salesforce Surveys
- Field service scheduling

SOLUTIONS

Work & Educate

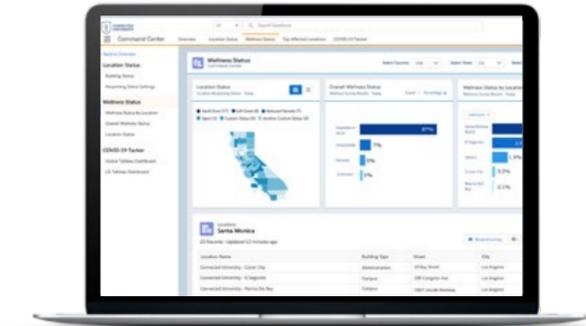


Work.com is an all-new suite of apps, expertise, and services designed to help institutions on their reopening journey.

With solutions like Employee Wellness Checks and Manual Contact Tracing, Work.com provides institutions with the tools needed to reopen safely so faculty and staff can get back to doing what they do best - driving learner success. Tools like Quip can help foster team collaboration while working from home. And institutions can train faculty and staff on new ways of engaging learners remotely with customizable content from Salesforce's online learning platform, myTrailhead.

1 | WORK.COM FOR EDUCATION

Guidance, expertise, and tools to reopen schools and universities safely.



2 | QUIP WORK FROM HOME

Try this virtual collaboration tool to help faculty and staff work from home.



3 | MYTRAILHEAD

Empower faculty and staff with this online learning platform so they're prepared to meet evolving learner and family needs.



TACTICS

- Weekly institution all-hands
- Daily faculty and staff success emails
- Faculty and staff surveys
- Salesforce GoCenter (benefits, resources, and services)

- Bot-assisted faculty and staff knowledge base (Concierge)
- V2MOM app
- Faculty and staff journeys
- On-demand virtual collaboration training

- Mental health and mindfulness programs
- Self-service help center for faculty and staff crisis needs
- Omni-channel workspace for case management
- Faculty and staff resource groups

SOLUTIONS

Engage Lifelong Learners

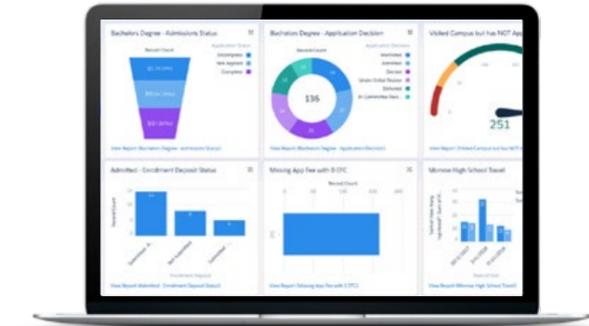


If there's one common theme we've heard from the education community, it's that the shift to digital is more important now than ever before - we've entered a new phase in education rooted in today's digital imperative.

With Education Cloud, institutions can engage digitally with prospective students and families, create virtual advising appointments and one stops, and drive personalized communications across multiple channels at every stage of the educational journey. Institutions of all sizes are already using Education Cloud to quickly pivot to a digital-first strategy and drive always-on engagements with learners, families, faculty, and staff.

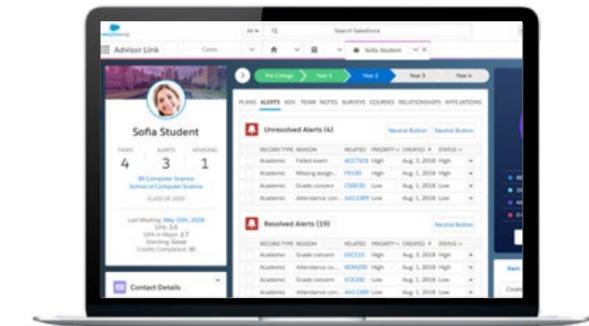
1 | EDUCATION CLOUD FOR RECRUITMENT & ADMISSIONS

Drive proactive engagement with prospective students and families and create a sense of belonging virtually.



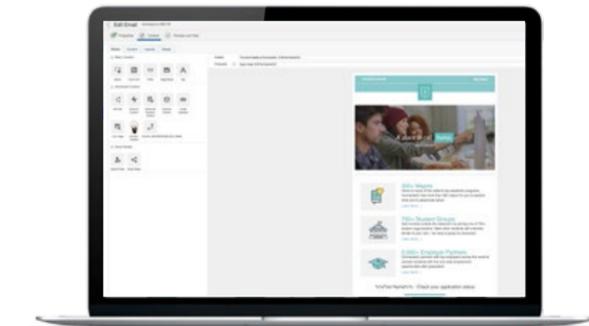
2 | EDUCATION CLOUD FOR THE STUDENT EXPERIENCE

Support virtual advising appointments, create digital one-stops and foster connections through tailored student and family communities.



3 | EDUCATION CLOUD FOR CENTRAL MARKETING & COMMUNICATIONS

Accelerate cross channel communications with 1-to-1 journeys, social engagements and impactful campaigns throughout the learner lifecycle.



TACTICS

- Digital outreach to prospective students
- Self-help portals to answer top questions
- Communities for newly admitted students
- Onboarding journeys

- Service bots
- Digital communities
- Virtual advising and one-stops via Salesforce Advisor Link
- Real-time response networks

- Social listening
- 1-to-1 journeys
- Data-driven campaigns
- Relevant communications at scale

SOLUTIONS

Engage Society & Community



Education institutions are the heart of their communities, serving as centers for lifelong learning and providing essential services to learners as well as their families. Institutions of all sizes can engage alumni networks to get involved and give back by volunteering or donating to learners in need.

By working with corporate and nonprofit partners, institutions can also accelerate their impact by matching job opportunities to learner interests or solving widespread issues like food or housing insecurity. Finally, by creating programs focused on reksilling and uspskilling, institutions can support adult learners at scale and help form pathways from degrees to careers.

1 | EDUCATION CLOUD FOR ADVANCEMENT & ALUMNI ENGAGEMENT

Build lifelong alumni and donor relationships that empower them to get involved and give back.



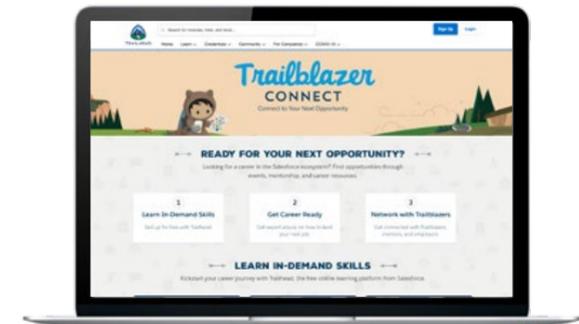
2 | EDUCATION CLOUD FOR CORPORATE & NONPROFIT PARTNERSHIP MANAGEMENT

Enhance corporate and nonprofit partnerships to expand community impact at scale.



3 | TRAILHEAD FOR LIFELONG LEARNING

Establish your institution as a center for lifelong learning with opportunities to reskill and upskill throughout a learner's lifetime.



TACTICS

- 1-to-1 outreach to alumni
- Streamlined operations with Gift Entry Manager
- Seamless online giving experiences

- Tailored communications to corporate & nonprofit partners
- Job matching to meet student needs
- Measurement of community impact at scale

- Trailhead
- Marketing outreach to adult learners
- Online communities for lifelong learners to learn from each other

Your Response Journey with Salesforce.org



A lot has changed in the past few months. But education institutions continue to be incredible forces for change and impact. As an education leader, you have the power to influence your community in profound new ways.

We hope these strategies to Stabilize, Reopen, and ultimately Evolve your institution will help you continue to keep learners at the center of everything you do. When you work from that mindset, everything else becomes easier.

Check out these additional tools and resources.

Thank you and stay safe!

Salesforce.org 1-to-1 Connect

Connect with peers and Salesforce.org experts to share best practices for crisis management, virtual operations, and online learning in the Power of Us Hub.

[Learn More](#)

Salesforce Care™

Explore Salesforce's free offerings to respond to COVID-19 including faculty, staff, and learner support with chatbots, contextual learning, philanthropy, and more.

[Learn More](#)

Work.com Solutions

Access our all-new suite of apps, expertise, and services to help you safely reopen your institution. This includes contact tracing, wellness checks, reskilling, shift management, and more.

[Learn More](#)

COVID-19 V2MOM

Develop a shared vision, values and prioritized action plan for managing through the crisis using Salesforce's proprietary strategic planning methodology.

[Learn More](#)

Salesforce.org Virtual Events and Web Series

Access Salesforce.org's virtual events and web series created to help education leaders navigate this challenging time.

[Learn More](#)

Leading Through Change Content

Discover thought leadership, tips, and resources to help manage your institution in a time of uncertainty.

[Learn More](#)

Customer Success

See how our customers are navigating the new normal.



HIGHER ED

Customer Success

ACTIONS TAKEN

- **Reimagine** student assessment reviews virtually
- **Reinforce** the importance of digital-first engagements
- **Reskill** staff to transition to online learning



“The teams are on fire, both the Salesforce team and the broader LSE team. Salesforce solutions are being delivered at an unbelievable pace and enabling business critical processes and services to support our students across the globe. The art of the possible is old news, this is realising the impossible, with Salesforce.”



THE LONDON SCHOOL
OF ECONOMICS AND
POLITICAL SCIENCE ■

MIKE PAGE

Head of Enterprise CRM & SRS

The London School of Economics and Political Sciences

HIGHER ED

Customer Success

ACTIONS TAKEN

- **Reimagine** communications with alumni
- **Return** focus to emergency funds & alumni volunteering opportunities to support students in need
- **Reinforce** importance of supporting OSU community



“Since the COVID-19 outbreak, we’ve been doubly grateful for Marketing Cloud... Again, our communications aren’t all about giving, but supporting our OSU community as family for as long as we need to.”



AMANDA DAVIS

Associate Vice President of Annual Giving & University Programs
Oklahoma State University Foundation

K-12

Customer Success

ACTIONS TAKEN

- **Reimagine** community support during COVID-19
- **Return** focus to family and alumni engagement to raise funds for community needs



“Providing support to our current families and alumni during these unprecedented times is important to Hill-Murray. Salesforce and Pardot enabled us to quickly engage our donors to meet the urgent needs of our community members.”



CHRIS ZUPFER

Vice President of Development
Hill-Murray School

K-12

Customer Success

ACTIONS TAKEN

- **Reimagine** student, family, and teacher support during school closures
- **Return** focus to donor communication and engagement to raise funds



“Austin ISD is adapting quickly to serve the emerging needs of our students and families during COVID-19. Pardot enables us to communicate effectively and efficiently in order to support our students and school communities.”



CYNTHIA SMITH
Project Specialist III
Austin Independent School District

Continue the Conversation

For more helpful resources on reopening your institution safely, please visit the Salesforce.org website.

LEARN MORE

This Salesforce.org COVID-19 response playbook has been tailored specifically for education institutions. To see the Salesforce.com COVID-19 response playbook visit [here](#).

