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The Higher Education Trailblazer's Guide to Salesforce
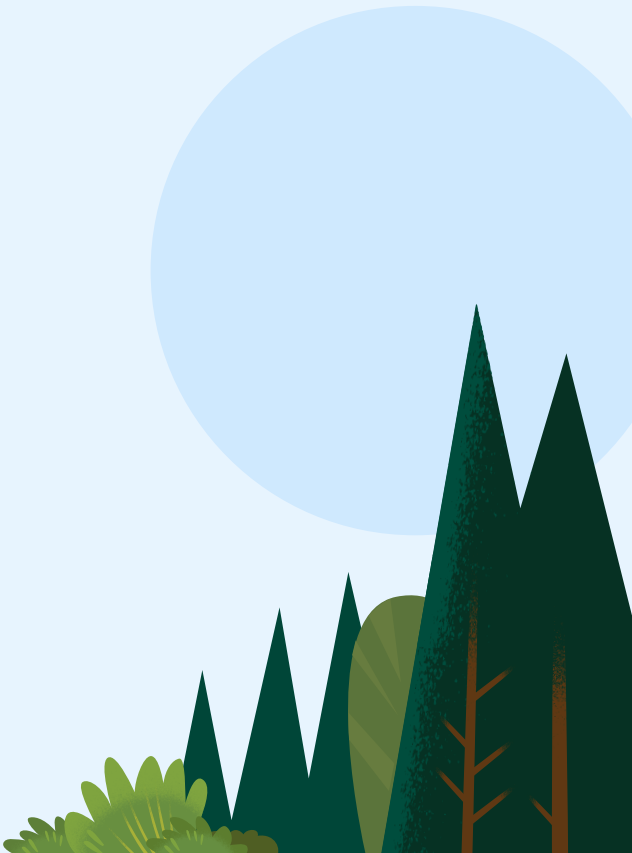
A Quick Start Guide to Learner and Institution Success

Contents

Introduction

Put your campus on the fastest path to digital transformation with Education Cloud

Institutions across the globe have been forced to quickly adapt and innovate in order to survive. Higher education is in the midst of a digital transformation. Many university leaders are investing in new business models and digital-first engagement strategies with a focus on driving learner and institution success, from anywhere. In fact, according to EDUCAUSE, 70% of institutions are either exploring or developing a digital transformation strategy and we created this guide to help institutions along that journey.

Education Cloud

Digital transformation is imperative for institutions of all sizes in today's success-from-anywhere world.

Education Cloud provides the digital foundation to capture 360-degree views across the entire education journey. This means your recruitment and admissions, student experience, advancement, and operations teams can use **an integrated platform** to capture valuable data from prospect to alum. With Education Cloud, institutions are moving from siloed systems to actionable insights for every learner. By spending less time gathering data, staff can do what they do best – **support learners with personalized experiences and build lifelong relationships.**

What's powerful about Education Cloud is that your institution can benefit from the latest innovations across the Salesforce platform as well as purpose-built education products and solutions that can easily be **customized and scaled** to your evolving needs. Whether you are just starting to explore new ways of operationalizing your campus, or you are actively evaluating technology solutions, we are here to help.

Let's discuss the Crawl, Walk, Run project methodology. The idea is that if a team is trying to achieve something big, sometimes you have to evolve your approach in stages rather than trying to make all the changes all at once. This is where Salesforce comes in. With our scalable approach, you can digitally transform your campus at your own pace. Below are a few key capabilities we use to gauge progress.

	Crawl	Walk	Run
Analytics & Insights	Analytics *are* available, but restricted due to data silos	Scaling operations processes with an engaging applicant and staff experience	Identifying trends with actionable insights
Communication & Engagement	Limited personalization because of point solutions	Data integration allows for increased personalization	AI powered, triggered, engagements with centralized management
Growth and Scalability	New capabilities require purchase of new tools that are poorly integrated	Centralized platforms with integration framework to incorporate new tools	Ability to both build and deploy new tools and rapidly adapt to change

Learner Success

- Recruitment and Admissions
- Student Experience

Recruitment and Admissions

Find, engage, and enroll best-fit students

Salesforce for Recruitment and Admissions Find and engage best-fit students, optimize processes, unlock enrollment funnel insights, and prepare every student for future success. Unify data, actionable insights, and team collaboration with Admissions Connect, a purpose-built product that allows you to drive applicant engagement, streamline application review, and work smarter with a 360-degree view of prospective students.
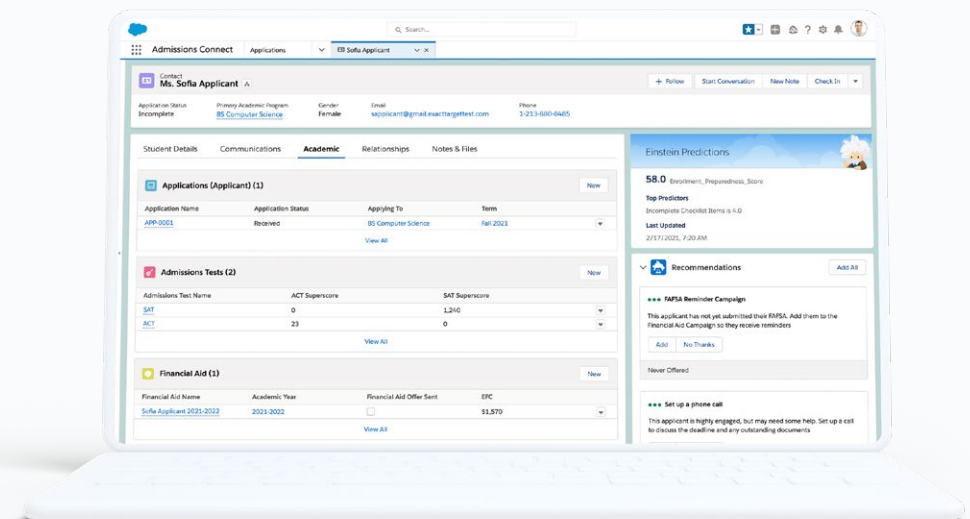
Statistics

+11%
enrollment

+17%
yield from admit to commit

+40%
faster marketing campaign deployment

Trailblazer Tip

Leverage analytics to unlock new opportunities to fill your pipeline with qualified students, including those most likely to enroll. Powerful dashboards put predictive modeling, automated scoring, and AI-enabled engagement capabilities in the palm of your hand, without needing to go to IT. Easily monitor how you're doing against your goals, from managing your funnel to projecting net tuition revenue.

Goal	Find and Engage Best-Fit Students	Optimize Recruitment and Admissions Processes	Unlock Enrollment Funnel Insights	Prepare Every Student for Success
Challenge	Personalizing the prospective student experience and engaging best-fit students	Scaling recruitment and admissions processes with an engaging applicant and staff experience	Identifying recruitment and admissions trends with actionable insights	Decreasing summer melt and providing a seamless new student onboarding experience
Strategic Priorities	• Increase enrollment • Drive engagement with personalized experiences • Identify and enroll best-fit students • Build and nurture new prospect sources • Bring external recruitment activities in-house	• Build relationships with prospective and admitted students • Support applicants throughout the application process with personalized support and action steps • Streamline the application review process for staff and applicants	• Predict enrollment and yield • Empower recruiters with actionable insights • Optimize your recruiting and admissions processes with data-driven ROI insights	• Ensure students are prepared to succeed on day one • Provide better visibility into student challenges throughout the enrollment and onboarding phases • Reduce summer melt
Use Cases	• Engage prospective students and parents with personalized content and experiences • Automate personalized communication at scale • Engage with prospects on their preferred communication channel • Build an organic prospect pool	• Encourage applicants to complete their applications with proactive support and personalized checklists • Enhance the application review process with a complete view of a student's application • Import data from external application systems such as the Common App	• Direct resources with actionable data • Engage prospects and applicants with AI powered recommendations and actions • Visualize enrollment trends with real-time data • Connect disparate systems for a 360-degree view of your data	• Provide proactive support to at-risk populations such as first-generation and low-income students • Identify which students are likely to be impacted by summer melt • Ensure students are engaged with the right academic and financial resources they need to succeed

Products

- **Admissions Connect:** Drive applicant engagement and streamline application review.
- **Marketing Cloud and Pardot:** Find and engage best-fit students with personalized communications.
- **Sales Cloud and Service Cloud:** Unlock a 360 degree view of every prospective student.
- **Digital Engagement:** Reach prospective students across every digital channel – including mobile, web chat, social networks, and chatbots.
- **Tableau:** Analyze and action on real-time prospective student data.
- **Student Success Hub:** Prepare every student for success with a personalized onboarding experience.

The Student Experience
Deliver outstanding service and drive retention

Salesforce for the Student Experience Maximize student engagement, streamline student services, deliver unified advising experiences, and unlock access to careers. Enable connections and promote smart engagement with Student Success Hub, a purpose-built product that allows you to modernize collaboration, understand students deeply, and empower successful outcomes for students.
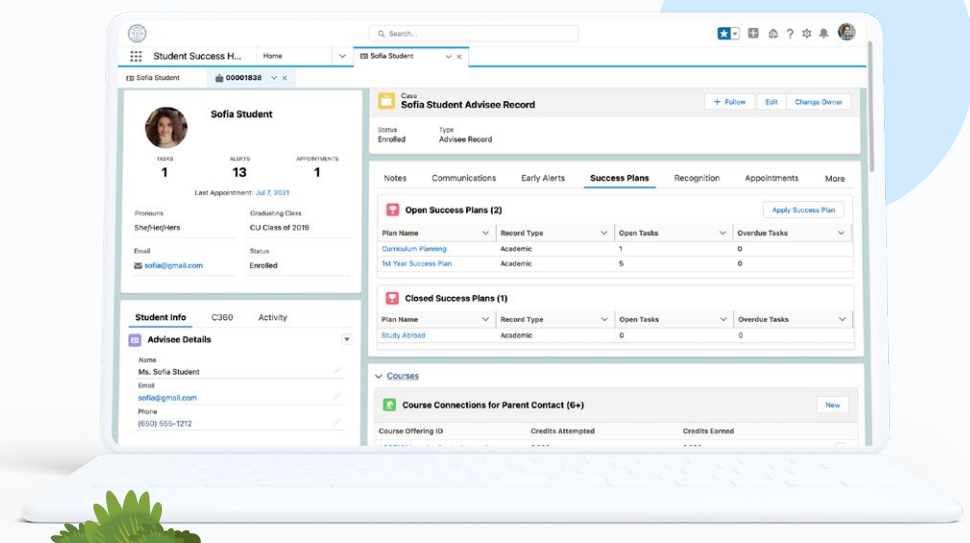
Statistics

+6.8%
retention

+10%
student engagement

-7%
decrease in support costs

Trailblazer Tip

Leverage a unified advising record to gain a complete 360-degree view of the student. Unlock insights from the entire student support network and integrated student systems to enable holistic conversations between advisors and students. Support conversations not only about their academic performance, but also about their whole being.

Goal	Maximize Student Engagement	Streamline Student Services	Deliver Unified Advising Experiences	Unlock Access to Careers
Challenge	Personalizing communications at scale	Delivering accurate and timely answers to keep students on-track	Building connections and driving engagement	Enabling career success
Strategic Priorities	• Ensure students stay connected via personalized communications and engagement channels • Deliver consistent experiences • Provide student service with social media	• Optimize service from anywhere • Deliver robust case management and self-service capabilities such as knowledge articles and bots • Connect students to staff more efficiently • Empower students to manage their university experience with one-stop convenience	• Modernize collaboration between advisors and students • Understand students deeply to enable holistic conversations • Empower successful outcomes from retention increases to on-time graduation	• Simplify careers advising processes • Empower job-skills development • Maximize employer engagement and outcomes • Personalize virtual career and employer events
Use Cases	Unify student communications, personalize student journeys, listen and engage on the right channels, deliver critical messages by text message	Manage call center operations and cases while providing frictionless experience for students. Route questions and solve problem	Onboarding to academic to career services. Keep students on track to graduate, allow advisors to focus on what matters while scaling their impact, and see a 360-degree view of every student.	Prepare students for the job market, help students find jobs in their field of study, cultivate employer relationships.

Products

- **Student Success Hub:** Deliver holistic and unified advising experiences from onboarding to careers.
- **Service Cloud:** Streamline student services and unlock a 360 degree view of every student.
- **Marketing Cloud and Pardot:** Maximize student engagement with personalized communications.
- **Digital Engagement:** Reach students across every digital channel – including mobile, web chat, social networks, and chatbots.
- **Tableau:** Analyze and action on real-time student data.

Institution Success

- Advancement & Corporate Relations
- Marketing & Communications
- Faculty & Staff Experience
- Institutional Operations

Advancement & Corporate Relations

Build lifelong alumni & donor relationships

Salesforce for Advancement Build trusted relationships with your constituents, modernize your frontline fundraising processes, drive personalized engagement with donors and volunteers, and streamline your operations.
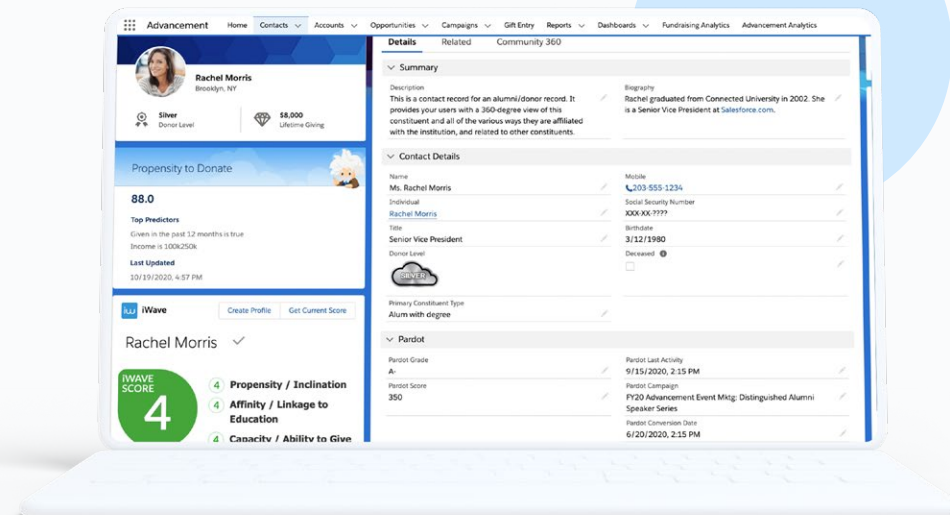
Statistics

+9%
alumni engagement

+5%
increase in funds raised

+31%
increase in campaign ROI Proven Results

Trailblazer Tip

Maximize operational efficiencies and drive frontline fundraiser productivity by leveraging the power of AI to identify fundraising and engagement gaps and pitfalls before it's too late. Use the power of AI to identify if there's a seasonal challenge by comparing performance to previous years, or a regional issue that needs marketing attention.

Goal	Modernize Frontline Fundraising	Amplify Alumni & Donor Engagement	Optimize Advancement Operations	Simplify Corporate & Foundation Relations
Challenge	Exceeding fundraising goals	Personalizing constituent engagement	Streamling gift management and reporting	Driving visibility across teams
Strategic Priorities	• Increase frontline fundraiser productivity • Surface donor pipeline insights • Leverage intelligent campaign recommendations • Identify new donor prospects	• Create dynamic, personalized alumni experiences • Surface relevant volunteer opportunities • Refine prospect nurturing & donor cultivation • Leverage deep segmentation & multi-channel communication journeys	• Deliver real-time reporting to leadership • Surface constituent insights on-the-go • Leverage efficient & intelligent data analysis • Gain a 360 view of every constituent	• Drive strategic Partnership Management • Unify teams and departments across campus • Surface actionable insights on corporations and partnerships
Use Cases	• Drive annual, leadership, major, principal & planned giving with mobile-powered moves management • Maximize frontline fundraiser productivity with one-click pipeline reporting • Identify new donors with actionable insights	• Engage new alumni and constituents with personalized outreach campaigns • Build connections with young alumni through new channels • Leverage intelligent, personalized outreach with strategic communications • Unlock new donor and volunteer connections via social listening	• Streamline systems and processes with efficient data flows and reporting • Enable real-time data analysis and reporting • Deepen stewardship impact with personalized and targeted reports • Surface new donors and volunteers with intelligent screening and prospecting	• Deepen and grow corporate partnerships with a unified view of outreach and engagement • Streamline and simplify partnership management with a 360-degree view of corporate partners • Align strategic partnership priorities in advancement, careers, and research

Products

- **Sales Cloud and Service Cloud:** Unlock a 360 degree view of every donor, volunteer, and constituent.
- **Experience Cloud:** Transform constituent connections.
- **Marketing Cloud:** Drive and deepen constituent engagement through personalized communications.
- **Tableau:** Analyze and action on real time constituent data.
- **Accounting Subledger:** Align fundraising and accounting data.

Marketing & Communications
Deliver unified communications across campus

Salesforce for Marketing and Communications Unify the people, processes, content, data, and insights that support connected engagement at scale.
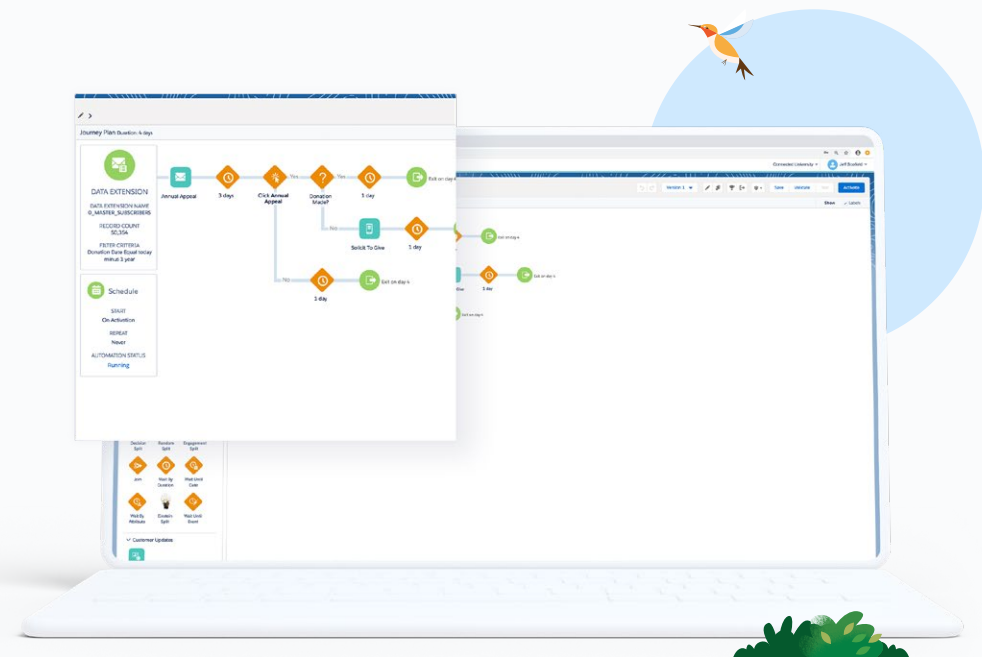
Statistics

+7%
increased open rates and up to 90% decreased unsubscribe rates

+11%
increased in total number of applicants

-11%
reduction in alumni association membership acquisition costs

Trailblazer Tip

Make 1:1 engagement a reality by designing personalized journeys for every constituent. Consolidate siloed point solutions into a single platform and enable marketers to unify, analyze, and act on all marketing data in a single dashboard. Easily monitor campaign metrics and iterate on programs to ensure success. Whether reaching new recruits, onboarding new students, or nurturing alumni relationships, ensure the highest level of engagement with Salesforce marketing and communications solutions.

Goal	Unify Marketing and Communications	Drive Marketing Intelligence	Enterprise Segmentation & Personalization
Challenge	Communicating in a consistent voice and delivering personalized digital engagement across channels	Gaining full visibility of marketing performance, spend, and ROI across the institution	Building a single source of truth for constituent audience data
Strategic Priorities	• Elevate stories that promote the university brand and improve reputation • Drive brand consistency in look, feel, and experience • Better understand the needs of constituents • Support issues management and crisis communication	• Increase efficiencies across marketing efforts • Gain visibility across channels and create a single source of truth on performance • Maximize budget ROI and tie revenue to marketing • Optimize data preparation and maximize visualization & analysis	• Fully understand all the ways constituents interact with the institution • Ensure that constituent communications are contextualized • Stay compliant with the GDPR and CCPA and other consent preferences
Use Cases	• Communicate seamlessly across email, SMS, push notifications, ads, web landing pages, and apps • Visualize personalization with journey mapping • Unite engagement across recruiting, enrollment, advising, student service, alumni relations, and more • Create sophisticated, dynamic content that's personalized by audience	• Help agencies improve efficiency and scalability • Integrate all channel data with a massive marketing API library. • Create marketing dashboards to visualize in-depth KPIs, performance trends, and campaign analysis • Connect chat platforms into dashboards and enable teams to collaborate on analysis, insights, and decision-making	• Unify constituent profiles through a common ID • Build highly specific audience segments and see accurate population counts to measure possible impact • Monitor digital and offline behavior to understand interests, affinities, and intent • Use real-time segmentation and AI to deliver contextually relevant experiences that inspire action
Products	• **Marketing Cloud:** Build constituent relationships for life with data-first digital marketing. • **Datorama:** Unify 100% of your marketing data and empower marketers with a single system of record. • **Customer 360 Audiences:** Capture, unify, and activate your audience data to deliver more personalized experiences.		

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Faculty and Staff Experience
Enhance faculty & staff service while building trust and safety

Salesforce for Faculty and Staff Salesforce helps institutions build amazing employee experiences through communities and apps. Using our suite of solutions, institutions can build tailored marketing campaigns, manage faculty and staff wellness, enable volunteering, create virtual advising appointments, and engage donors with digital-first solutions that accelerate support for your entire campus community – regardless of where they are working.
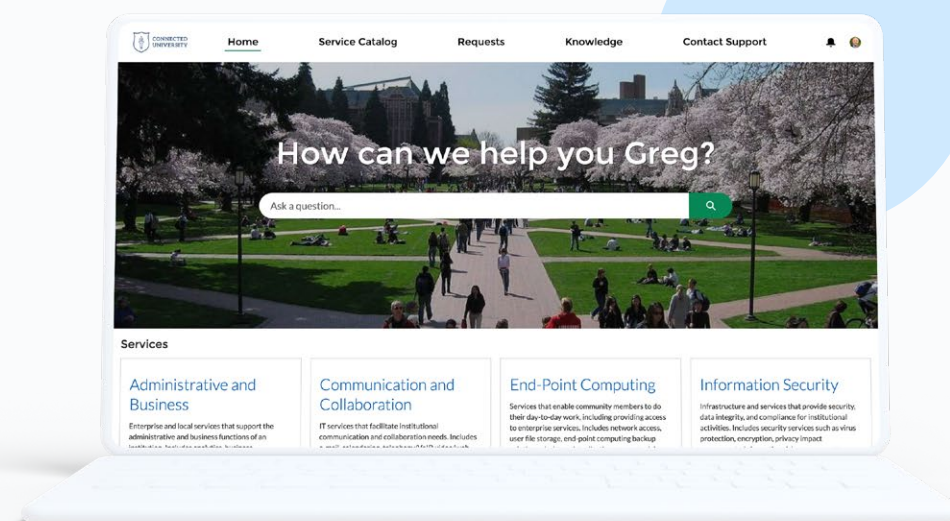
Statistics

+44%
faster collaboration

+31%
increase in employee engagement

+16%
increase in retention

Trailblazer Tip

Develop a strategy that addresses the entire lifecycle of faculty & staff, and where needed, identify differences between those two personas. Focus on the end-constituent experience built on a flexible platform so that employees have access to a one-stop experience that is personalized and relevant to their needs, whether those employees are on-site, hybrid or remote.

Goal	Reimagine the Intranet	Streamline Employee Services	Transform Onboarding and Communications
Challenge	Increasing employee productivity, engagement, and retention	Simplifying access to help resources and ticket resolution	Streamlining onboarding of new employees
Strategic Priorities	• Simplify employee communication • Enhance team productivity • Allow employees to work from anywhere	• Streamline employee case management • Visualize leadership analytics and insights • Power service and support from anywhere	• Allow self-service for new employees • Create personalized onboarding experiences • Create a culture of ongoing learning
Use Cases	• Create a single source of truth for employee communications • Enable document sharing across campus • Support hybrid or remote employees	• Design a centralized knowledge database • Power self-service help and support with bots • Design executive level dashboards • Promote employee wellness & learning	• Automate onboarding journeys • Simplify role changes and decrease ramp time • Enhance professional development

Products

- **Experience Cloud:** Engage employees through a customized online portal.
- **Service Cloud:** Provide personalized faculty and staff service and support from anywhere.
- **Marketing Cloud:** Create triggered, personalized employee journeys on their preferred channel.
- **Tableau:** Gain real-time insights on your employee experience.
- **Philanthropy Cloud:** Engage employees through cause-based volunteerism and fundraising.

Institution Operations

Complete, connected data and service to become operationally lean

Salesforce for Institution Operations Maximize operations and streamline processes by connecting data and systems, automating workflows, personalizing engagement, and tracking and measuring success.
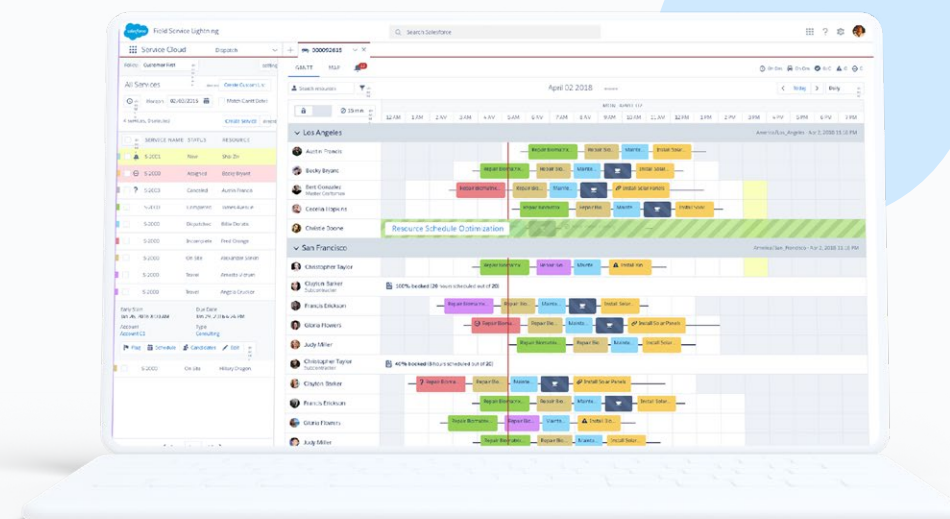
Statistics

+71%
increase in executive licensing agreement

-30%
decrease in employee onboarding time

Trailblazer Tip

Evaluate areas of opportunity within your daily operations and design a strategy to consolidate and streamline efficiencies across departments. Focus on areas that have similar workflows and see where systems and processes can be combined. Agree on a set of metrics to track and measure success across stakeholders.

Goal	Research Operations	Facilities Management
Challenge	• Engaging and communicating to multiple stakeholder groups in a consistent, personalized way • Managing work streams and containing costs • Measuring and tracking outcomes • Identifying new opportunities for innovation/tech transfer	• Gaining visibility across operations • Minimizing disruption while standardizing processes • Providing stakeholders with timely, responsive service and case management
Strategic Priorities	• Optimize research lab operations • Improve collaboration among cross-functional working groups • Optimize commercialization lifecycle • Track and enhance corporate relationships	• Maximize efficiencies • Remove manual processes and automate • Contain costs, track utilization and make improvements based on data • Enable consistent, connected service across campus
Use Cases	• Track the entire lifecycle of innovation from ideation to commercialization • Empower faculty & staff to engage with relevant topics and communicate with workgroups in a single place. • Manage anything from research animal care, to research participant recruitment, to time-sensitive bio samples at-scale • Document and track stewardship	• Streamline workforce management with versatile dispatch console to manage schedules and appointments • Easily comply with service level agreements by minimizing travel time, overtime, costs, and no-shows • Track and manage the storage, request, transfer, and consumption of inventory • Manage work orders, track repairs, standard maintenance, and maintain service contracts • Report and action on your data with easy to use dashboards

Products

• **Sales Cloud:** Gain a 360 degree view of all corporate/industry relations activity
• **Marketing Cloud:** Engage and communicate with all stakeholders in a consistent way
• **Service Cloud:** Streamline field service and facilities operations in a single support platform
• **Accounting Subledger:** Align financial and accounting data
• **Tableau:** Create a command center to visualize data insights for any urgent or routine campus initiative

Getting Started Resources to Guide Your Every Step

Your institution is unique, and so is your path to success with Education Cloud. Whatever goals you're trying to achieve, we can help guide you on your journey. As you're getting started, you'll find resources grouped into into three categories, designed to fit your needs: "Do It Myself", "Show Me How", and "Do It With Me."

Ready to start your learning journey? Head over to the Get Started with Education Cloud customer learning path today.

Make sure to also check out the AppExchange, the leading enterprise cloud marketplace. The AppExchange makes it easy to extend the power of Education Cloud with multiple apps available from our robust ecosystem of higher education partners.

Get started

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