4 Practical Steps To Transform Your Institution With AI

A Playbook for Higher Education

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The next wave of the AI revolution has begun in higher education.

Much of the debate on artificial intelligence (AI) has focused on if and how students should use generative AI tools like ChatGPT in their coursework. *But what about how higher ed institutions can leverage generative AI to improve the student experience and increase efficiencies across campus?*

Can these tools improve your faculty and staff's workflow? Can AI help drive critical outcomes throughout the student lifecycle – in areas like recruitment and admissions, student success and advancement?

Absolutely.

In fact, it's insufficient to say AI can help. Institutions that want to thrive long term need to be proactive in developing an effective AI strategy that's rooted in trusted, holistic data.

But where do you start? How does your institution begin an effective AI conversation? How do you ensure you adopt the right AI technologies – ones that will drive the most impact for your students, faculty and staff? And how do you execute your AI strategy in a thoughtful, strategic and trusted way?

In this playbook, you will find answers to these and other crucial questions. The answers – drawn from higher education leaders at Salesforce – take the mystery out of AI. You'll also walk away with practical steps for your institution to unlock meaningful value from AI across multiple use cases.

Salesforce is a trusted partner to more than 4,000 education institutions globally and has been invested in AI innovation for nearly a decade.

How To Unlock Value From AI Across Your Institution

How can your institution develop a thoughtful AI strategy?

To begin, it's crucial to unpack the differences between the two types of AI that are most important in higher education: **predictive** and **generative**.

- **Predictive AI informs:** It makes predictions based on what it sees in existing data, providing faculty and staff with critical insights that inform next steps. For example, your institution can use predictive AI to inform enrollment targets, proactively flag at-risk students, or score donor and alumni engagement.

- **Generative AI assists:** It delivers pre-packaged actions to drive value faster across your institution, generating something new based on what it learns from your institution's data. For instance, generative AI can auto-create advising notes, build out personalized content at a 1:1 scale, and develop targeted email or campaign segments quickly.

Higher ed institutions have used predictive AI for years, but the tools have become much more robust. And with the next wave of the AI revolution focused on generative AI, institutions can use this technology to truly maximize faculty and staff efficiency in new ways.

Salesforce lead solution engineer Michelle Roch gives an example: "Say your school is preparing content for your annual giving event. Your staff can leverage generative AI (or natural language) to produce email copy. While a generic message likely won't motivate constituents to take action, hyper-personalized content informed by the rich data you have on each of your constituents has proven to be successful. Generative AI can generate personalized email copy, subject lines and even event landing pages based on each prospective donor's interests."

According to Roch, institutions must keep in mind that AI is only as good as the data it receives. "I can't emphasize enough that trusted, unified data must be at the forefront of any AI strategy," she says.

Is AI Going To Take Everyone's Job?

One of the big fears associated with the next wave of the AI revolution is that AI will eliminate people's jobs. In reality, these tools can help unburden higher ed staff and make them more efficient.

"I think of AI as a copilot," says Sadia Saifuddin, director of product management for Salesforce Education Cloud. "It helps faculty and staff be more efficient with the daily, repetitive tasks that can take a lot of time. Instead, they can focus their time and attention on adding value to their students in a way that only a human being can."

Paul Napleton, head of digital and marketing automation at the University of East Anglia (UK), agrees. He says AI "is like having an extra member or two of your team."

Data qualities that can impact the effectiveness and efficiency of an AI strategy include:

- **Data harmonization.** Many schools can't easily access all of their data due to overlapping technologies and incompatible systems. One report found that the average institution has 35 different systems to manage the student journey.

  Roch sees this issue all the time. "Over and over, institutions come to us because they have data siloed in different systems that can't speak to one another or be used to take action. To maximize AI's impact, you need a way to harmonize all your internal and external data sources into a common model. That's the value of something like Salesforce's Data Cloud."

  She adds that it's important to contextualize harmonized data because it comes from different sources – such as web and mobile data, your institution's SIS or LMS or even student wellbeing insights.

- **Data reliability and results.** Bringing all of your data into one, unified constituent view produces a single source of truth that enables your institution to use AI to start drawing predictive insights from your data, such as a constituent's likelihood to enroll, stop out or donate. However, when using data for predictive or generative insights, the larger the data set, the more reliable the results. As Roch highlighted above, AI is powered by context. The more context it's given, the more capable it is of giving a reliable prediction or generating a relevant result or action for your institution.

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>
> **MICHELLE ROCH**
> **Lead Solution Engineer, Salesforce for Higher Education**

AI STEP #1:

Identify the top three areas where faculty and staff have trouble getting the data they need.

Make a list of all the scenarios where your faculty and staff struggle to get the data they need to do their jobs effectively. Then, set priorities: What are the top three areas across campus that would benefit from a holistic constituent profile?

This step will help you lay the groundwork for identifying areas where predictive and generative AI can help drive efficiencies and improve the overall constituent experience.

Determine where you are on the AI Maturity Model.

Salesforce developed an AI Maturity Model to help institutions determine where they stand and where they need to go as they develop an AI strategy.

- **Phase 1: Harmonize your data.** Does your institution have data scattered across different databases that can't talk to one another? Do you struggle to contextualize data coming from different sources? Do you need to wait until the end of the week or month for reports? If so, focus on creating a unified, real-time view of your students, alumni and donors. You need holistic data and a reliable data set for AI to draw accurate conclusions.

- **Phase 2: Develop predictive insights.** Once you have harmonized your data, harness predictive AI to gain insights into small issues before they become bigger. For instance, predictive AI can trigger alerts in your CRM when a student is at risk of not enrolling in courses or dropping out, helping to ensure your staff is one step ahead of student needs.

- **Phase 3: Use generative AI to take action.** Once you have access to deep insights across your constituent data, you can use that data to generate net-new actions, like drafting an email to a student who needs to begin career planning, creating a notes summary from a recent advising call, or generating relevant job skills for specific courses and programs.
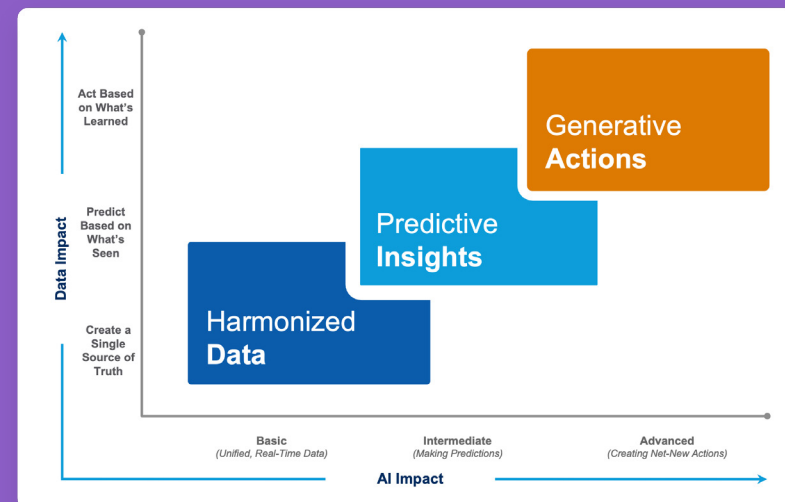
How To Use AI for Maximum Impact Across the Student Lifecycle

During a recent webinar, Salesforce asked higher ed attendees which topics were the main focus of their AI conversations. The top response? How to use AI to improve recruitment and admissions, student success and advancement.

This finding doesn't surprise Salesforce's Saifuddin, who indicates, "Conversations around AI almost invariably turn to how AI tools can help institutions see better results in these areas. Admissions, recruitment, student success, alumni relations, advancement – these departments all face a lot of pressure to produce results, particularly in a world where higher ed institutions are battling an enrollment cliff and learners are expecting consumer-grade, technology-first experiences."

So, how can your institution use AI to boost productivity and improve the constituent experience in these key areas? Here are some examples.

Recruitment and Admissions

Personalized messaging can help set your institution apart in the eyes of prospective students. In one survey, only 15% of high school juniors said that colleges sent them information tailored to their interests, but **84% of those who have received personalized communications reported that this increased their interest in the institution.**[1]

Combining harmonized data with predictive and generative AI empowers your institution to personalize outreach in new ways. Roch says, "You can be proactive in serving students when you have unified profiles that surface insights based on their website activity, event activity, application data, transcripts and other data. And AI lets you be proactive at scale."

Other ways AI can up level recruitment and admissions at your institution include:

- **Generating intelligent campaign segments** and personalized emails to prospective students using AI-powered marketing automation based on interests, region and other key factors.

- **Automating responses to common questions** from prospective students using chatbots, enabling your marketing team to optimize your institution's website with highly relevant information and your admissions team to respond to inquiries faster.

- **Helping set proper enrollment targets** with actionable dashboards, which is an area where many institutions struggle. In 2019, six in 10 colleges failed to hit their goals.[2]

- **Flagging admitted students** who will likely not enroll with predictive AI and then using generative AI to produce personalized communications to check in with those students at the right time for maximum impact.

[1] 2023 Niche Spring Survey of Juniors, Niche.

2 "At the Precipice: 6 in 10 Colleges Say They Missed Fall Enrollment Goals." The Chronicle of Higher Education, February 24, 2020.

Student Success

The personalization that AI enables also makes a big difference in student success.

When Salesforce surveyed college students, only a third reported having a great experience at their institution. But among those students who did, **60% said they had personalized experiences tailored to their needs,** and **86% said they had easy online access to helpful resources.** In contrast, among students who had a poor experience, only 11% said they had personalized experiences, and 49% said they had easy online access.

Having a 360-degree view of student profiles enables your institution to proactively support students. Say you have a student who missed some classes and did poorly on midterms, and they search for "how to drop a class" on your website. All that data will trigger an alert in their CRM profile. With generative AI, you can automatically draft and send a quick check-in message.

That's when your staff swings into action. An advisor receives the alert and immediately looks at the student's record. Thanks to predictive AI, the record tells the advisor the student's likelihood of staying enrolled and the top predictors behind that number. That context helps the advisor work efficiently and ensures a tailored support plan is created with that student.

AI empowers your staff to spend less time gathering data and more time connecting with students when they need support the most.

Generative AI can produce a summary of the advisor's meeting with the student. Other staff members can access the report and quickly get up to speed to deliver holistic support with the critical insights they need. AI can also help uncover certain student patterns and the most effective interventions to maximize student success at scale.

Here again, AI doesn't *replace* human activity. It enables much richer, more personalized student support.

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>
> **SADIA SAIFUDDIN**
> **Director of Product Management,**
> **Salesforce Education Cloud**

Advancement and Alumni Engagement

Leveraging AI to invest in student success will also pay off when students become alumni. A student who has a great higher ed experience is [31 times more likely to be a proud alum](#) than someone who had a poor experience, Salesforce's survey reveals. And proud alumni tend to reengage with your institution as volunteers, donors and lifelong learners.

Once your institution harmonizes its data and leverages AI, your advancement and alumni engagement teams can:

- **Predict the likelihood of a student staying engaged** after graduation – and, using AI, develop an engagement strategy tailored to that person's interests.

- **Determine alumni's likelihood to donate** to your institution and at what levels.

- **Create alumni engagement scores** based on a lifetime of data, such as the recency, frequency and value of their contributions, and, by using predictive AI, gauge their potential for future gifts.

- **Maximize engagement** among alumni and prospective donors by using generative AI and marketing automation to create personalized emails, text messages or newsletters.

Whether you're dealing with prospects, students, alumni or donors, creating personalized experiences is fundamental. But the challenge has long been "how to increase personalization while preventing staff burnout," says Salesforce's industry solutions senior director for education, Germán Freiwald.

AI addresses that challenge, Freiwald explains. "This is where I see the greatest promise for AI across recruitment and admissions, student success and advancement. In the near future, leading institutions will think of both predictive and generative AI as power tools for their staff, allowing them to respond in faster and more personalized ways."
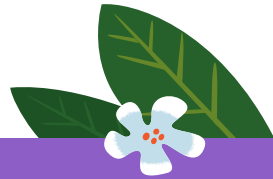
AI STEP #3:

Prioritize areas across campus where you want to improve the student experience and increase efficiency.

Maryville University is on a path to integrate AI throughout the student lifecycle.

Before harnessing AI and data, Maryville struggled to identify what students were going through and how the university could best serve and educate them. Maryville's president, Dr. Mark Lombardi, says the university might get a "few snapshots," but faculty and staff could only look "at them after the fact, like an old scrapbook." But by activating harmonized data alongside AI to enable live, intuitive student service, Maryville can now "create a film of the student journey … in real time, so that we can track

that journey, we can stick with students, we can provide amazing services and education."

Where does your institution need a better real-time view of student experiences? Where do you want more than a few "snapshots" of students? By answering these questions, you'll identify areas where you can improve the student experience and where your staff can be more efficient.

Once you've made your list, determine your priorities. Those priorities will inform how your institution advances in its AI journey.
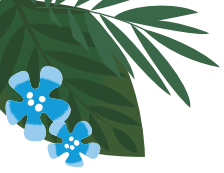
How To Protect Your Constituents' Data and Implement AI You Can Trust

"When I ask institutions whether they are using generative AI, most say no," Freiwald says. "But when I ask how staff are using it on their own, they have many examples. It's the Wild West! I encourage institutions to provide proactive guidance on how staff should use generative AI. I also suggest that they provide tools that their central IT department has vetted."

An integral element of a thoughtful, strategic and trusted approach to AI involves protecting data privacy.[1] "The issue of trust comes up whenever I speak with higher ed professionals," Freiwald indicates. "First and foremost, institutions want to know how they can keep their constituents' data secure while using generative AI. Maintaining student data privacy is nonnegotiable."

He adds, "Higher ed professionals also want to know how to mitigate biases that could be ingrained in AI."

Given all these potential issues, you must look under the hood of AI providers. Find out what measures they take to protect data on your students, alumni, faculty and staff. Ask how they guard against bias.

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>
> **GERMÁN FREIWALD**
> **Industry Solutions Senior Director,**
> **Salesforce for Education**

[1] [2024 EDUCAUSE AI Landscape Study](#), EDUCAUSE.

Leverage a platform that maximizes the value of AI and data across your institution — and that you and your constituents can trust.

An integrated platform built for the needs of education combines the power of data and AI with your CRM so you can access data, act on it in one place and trust the results.

"You often hear a CRM discussed as a 'system of *record*,'" says Salesforce's Roch. "But institutions need to move to a system of *engagement*. That allows you both to create a unified constituent profile and to take action on that data, all in one place."

A platform approach also enables you to lead with a trusted AI strategy. With AI innovation developing rapidly, data security is essential for every institution.

Salesforce's Saifuddin says, "Our product strategy is grounded in what we call the Einstein Trust Layer, which is our promise to our customers that any data passed through our AI gateways is securely retrieved and masked to keep the LLM from processing personally identified information, is never stored anywhere outside of their CRM, and is scanned for toxicity and bias."

"We work closely with LLM providers to ensure our customers' data is protected and secure at every step," Saifuddin adds.

With generative AI, users can give feedback that trains the model to refine its responses over time, which could be key to opening up new ways for faculty to maximize learning outcomes. For example, instructors can drive reinforcement learning based on their feedback, measure outcomes at each stage of the student journey and replicate key actions every step of the way.

4 Steps to Leveraging AI Effectively Across Your Institution

Higher ed institutions can't be slow to adopt predictive and generative AI. As competition for students intensifies and student expectations increase, institutions that don't develop an AI strategy will fall behind. What you do now will determine where your institution will be in a few years.

How can your institution move strategically? By remembering these four steps:

1. **Identify the top three areas** where faculty and staff have trouble getting the data they need to do their jobs effectively.

2. **Determine where your institution is** on the AI Maturity Model and where you need to go.

3. **Prioritize areas across campus** where you want to improve the student experience and increase efficiency.

4. **Leverage a "system of engagement"** that maximizes the value of AI and data across your institution – and that you and your constituents can trust.

One last piece of advice: Don't try to create a system from scratch. Laurie Cantwell, director of digital strategy and transformation at the University of Nevada, Las Vegas (UNLV), puts the matter simply: *"Partner with experts."*

UNLV sought a partner that worked "on the front lines" with colleges and universities. Cantwell explains that partnering with Salesforce spared UNLV from having to build from the ground up.

For example, UNLV didn't need to brainstorm which student issues to address when the university rolled out an AI-powered chatbot. Cantwell's team turned to Salesforce to learn, "What are those top ten questions that students are asking?" Having a partner that worked with so many other institutions allowed UNLV to focus on execution rather than going down a "rabbit hole," according to Cantwell.

Such an approach allows you to iterate as you go, shortening the time needed for rollout and ensuring your institution is set up for long-term success.

Keeping up with the AI revolution doesn't have to be overwhelming. Leverage this playbook to support your students, faculty and staff every step of the way.

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