



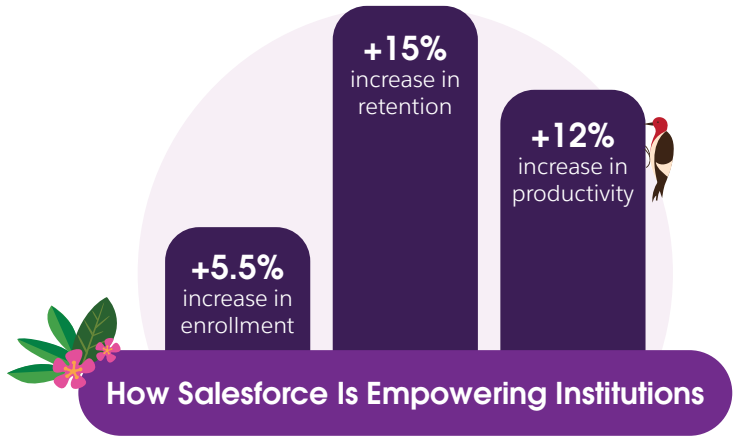
# Education Cloud

Elevate the education experience with the #1 CRM for learner and institution success.

## Explore the key features of Education Cloud.

Education Cloud is accelerating time to value for institutions of **all sizes** and making it easier to create **personalized experiences** for every lifelong learner.

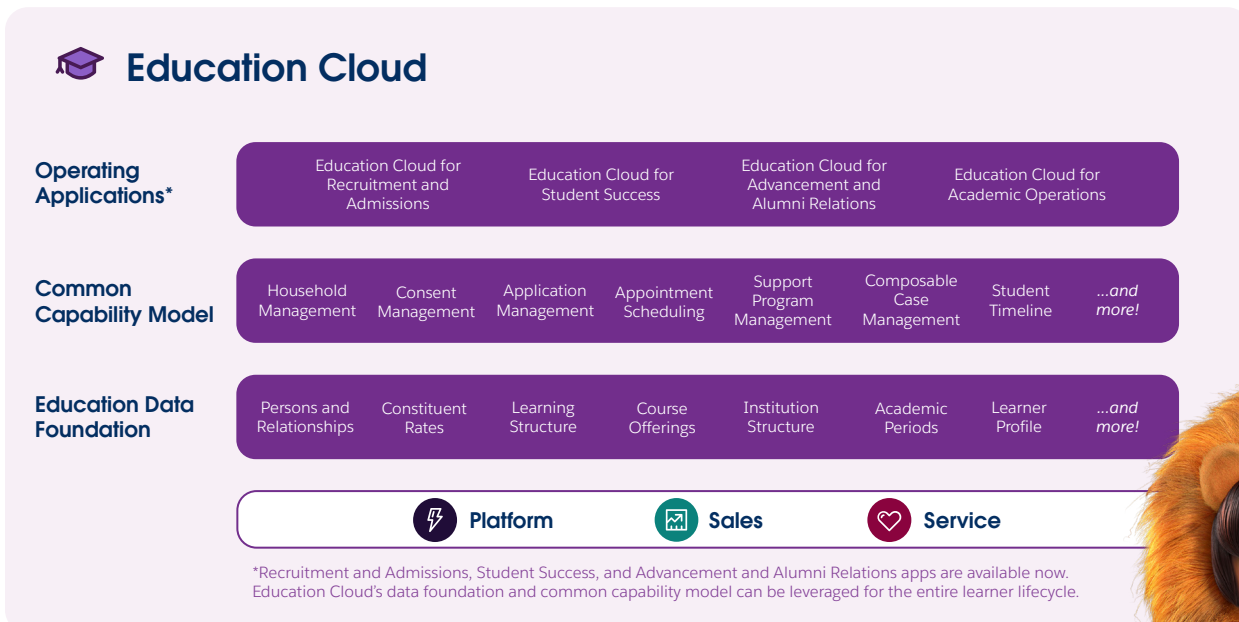
- 1 Learner-Centric Data Foundation**  
Get started faster with education-specific objects, logic, and automation built on the #1 CRM platform.
- 2 Core Capabilities for Your Entire Institution**  
Maximize faculty and staff impact with features like scheduling and case management that can be used dynamically across any department.



Source: [Forrester Total Economic Impact Report](#)

- 3 Pre-Built Apps to Power the Learner Lifecycle**  
Increase productivity with ready to go, configurable apps designed for each stage of the learner journey.
- 4 Analytics and Intelligence at Your Fingertips**  
Access real-time insights that power personalized support for prospects, students, and alumni.

## How Education Cloud Works





# Education Cloud Core Capabilities

We've designed Education Cloud with the flexibility needed to meet evolving constituent needs, fast. Built with a learner-centric data foundation that allows you to easily scale as you grow, Education Cloud provides each department with a set of core capabilities to maximize impact across your entire institution.\*

| Capability                    | Description   |
|-------------------------------|---|
| <b>Accounting Subledger</b>   | Reduce time spent on reconciliation by connecting systems and preparing your financial data for your accounting system.   |
| <b>Actionable Lists</b>       | Keep students and staff on track by creating dynamic action lists to track progress in real time.   |
| <b>Alert Framework</b>        | Ensure students never miss an update or deadline with triggered notifications and reminders.  |
| <b>Business Rules Engine</b>  | Reduce time spent on manual lookups and calculations by designing complex business rules with automated workflows.  |
| <b>Care Plans</b>             | Build a path to success with a defined blueprint of tasks that can be assigned to any student.  |
| <b>Case Management</b>        | Create a seamless one-stop-shop for students to get the support they need, when they need it.   |
| <b>Data Processing Engine</b> | Transform student and institutional data found across Salesforce into actionable records.   |
| <b>Document Checklist</b>     | Reduce friction and streamline updates between students and staff using checklists and real-time document uploading.  |
| <b>Document Generation</b>    | Easily generate both PDF and Word documents using Salesforce and external data sources, right from the platform.  |
| <b>Identity Verification</b>  | Reduce student support call times with a standardized identity verification process that is flexible, provides an audit trail, and helps combat identity fraud. |
| <b>Interaction Summary</b>    | Easily collaborate across departments by capturing and sharing structured meeting notes, including attendees, dates, and content.                               |
| <b>Interest Tags</b>          | Capture client needs and interests with custom tags. Easily create reports and dashboards showing common themes to design personalized outreach at scale.       |
| <b>OmniStudio</b>             | Drive engagement by easily designing personalized, guided experiences of your institution.  |
| <b>Salesforce Scheduler</b>   | Easy, streamlined appointment booking across departments.   |
| <b>Timeline View</b>          | Allow students and staff to reference applications and past interactions to evaluate progress.  |

\*This is a sub-set of common capabilities included with Education Cloud. Please connect with your account executive for further details.

Sign up for a free trial of Education Cloud at [bit.ly/EducationCloudTrial](https://bit.ly/EducationCloudTrial)

