



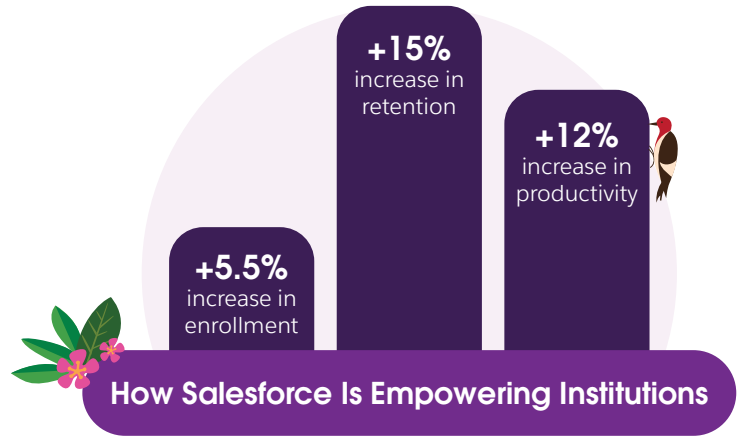
Education Cloud

Elevate the education experience with the #1 AI 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.

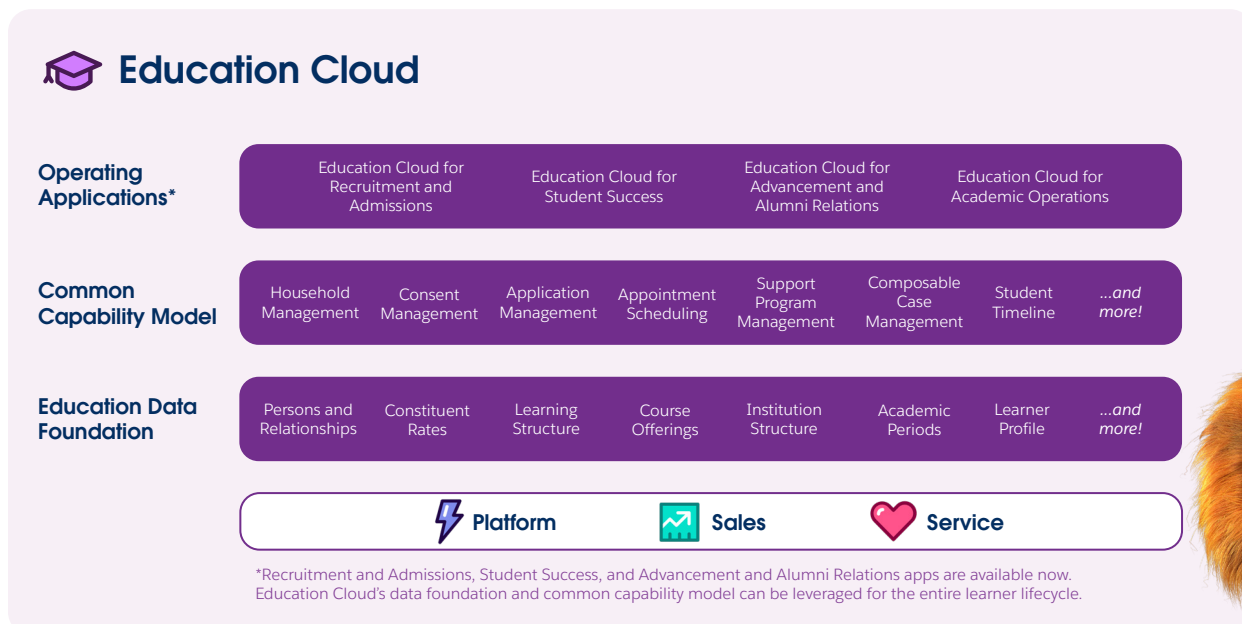
- 1 Learner-Centric Data Foundation**
Get started faster with education-specific objects, logic, and automation built on the #1 CRM platform.
- 2 Core Capabilities for Your Entire Institution**
Maximize faculty and staff impact with features like scheduling and case management that can be used dynamically 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
Accounting Subledger	Reduce time spent on reconciliation by connecting systems and preparing your financial data for your accounting system.
Actionable Lists	Keep students and staff on track by creating dynamic action lists to track progress in real time.
Alert Framework	Ensure students never miss an update or deadline with triggered notifications and reminders.
Business Rules Engine	Reduce time spent on manual lookups and calculations by designing complex business rules with automated workflows.
Care Plans	Build a path to success with a defined blueprint of tasks that can be assigned to any student.
Case Management	Create a seamless one-stop-shop for students to get the support they need, when they need it.
Data Processing Engine	Transform student and institutional data found across Salesforce into actionable records.
Document Checklist	Reduce friction and streamline updates between students and staff using checklists and real-time document uploading.
Document Generation	Easily generate both PDF and Word documents using Salesforce and external data sources, right from the platform.
Identity Verification	Reduce student support call times with a standardized identity verification process that is flexible, provides an audit trail, and helps combat identity fraud.
Interaction Summary	Easily collaborate across departments by capturing and sharing structured meeting notes, including attendees, dates, and content.
Interest Tags	Capture client needs and interests with custom tags. Easily create reports and dashboards showing common themes to design personalized outreach at scale.
OmniStudio	Drive engagement by easily designing personalized, guided experiences of your institution.
Salesforce Scheduler	Easy, streamlined appointment booking across departments.
Timeline View	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

