



# Education Cloud for Student Success

Build deeper connections with students.

## Explore the key features for Student Success.

Powered by the #1 AI CRM, Education Cloud accelerates time to value for institutions of **all sizes** and makes it easier to create **personalized** student experiences.

**1 Holistic View of Student Data**  
Get a 360° view of every student quickly with insights from their entire support network and integrated systems.

**2 Personalized Student Support**  
Identify students in need and intervene with alerts, care plans, and success teams.

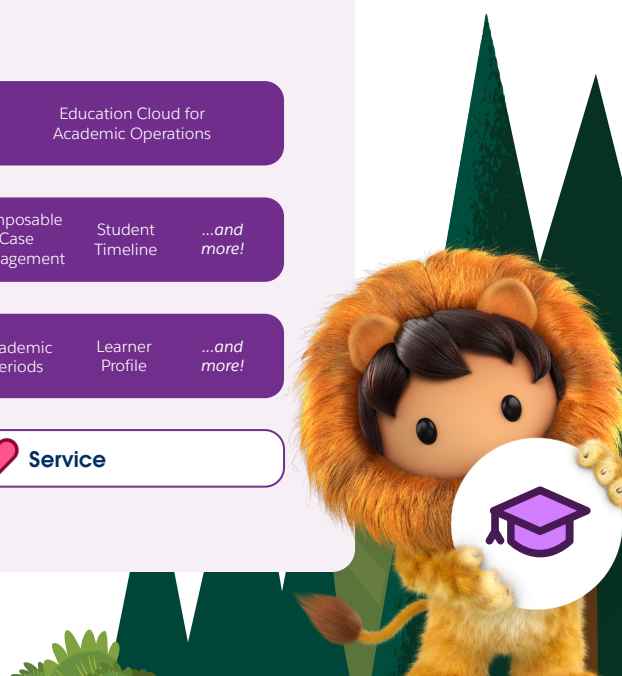
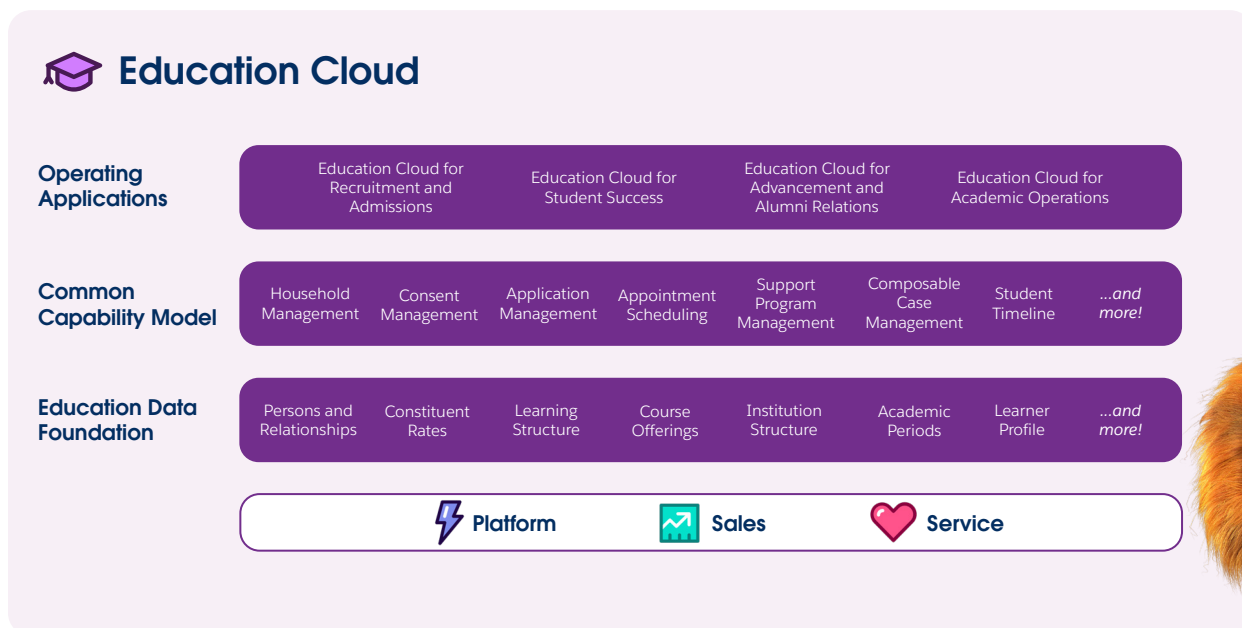
**3 Modern User Experiences**  
Simplify appointment scheduling and track student support programs and the services they provide like careers, tutoring, and well-being.

**4 Analytics and Intelligence**  
Gain critical insights into student success metrics to support your engagement, retention, and graduation goals.



Source: 2023 Total Economic Impact™ of Salesforce for Education

## How Education Cloud Works





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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 a set of core capabilities alongside an app for student success.

| Capability                                | Description  |
|---|--|
| <b>Action Plans and Templates</b>         | Scale staff impact with templates designed for students to create their own action plans, visible to advisors, that quickly define the actions they should take to stay on track.  |
| <b>Advisor and Director Consoles*</b>     | Use pre-built analytics and intelligence to gain critical insights into student success metrics to support your engagement, retention, and graduation goals. Empower leadership with real-time data to identify trends and drive continuous improvement.   |
| <b>Alert Framework</b>                    | Get early indicators to identify students in need and quickly intervene. Create, automate, and aggregate alerts to take action individually or at scale.   |
| <b>Care Plans and Templates</b>           | Help students reach their academic, career, and personal goals. Advisors and support staff can build personalized care plans with customizable tasks that help them address students' biggest challenges and work toward specific milestones. Create plans individually or as scalable templates, and track them to provide ongoing support. |
| <b>Case Management</b>                    | Simultaneously unify advising data while supporting staff-student collaboration in a one-stop center. Quickly triage needs and help students overcome obstacles using pre-built flows to automatically create and close cases, and assign them success team members.   |
| <b>Intelligent Degree Planning</b>        | Effortlessly navigate degree planning for a seamless journey to graduation with an intuitive interface that students and staff can use to shape each academic journey.   |
| <b>Intelligent Question Generator</b>     | Simplify support program management and increase staff productivity by using AI to generate intake questions for advising, extracurricular, and other student support programs.  |
| <b>Interaction Summaries</b>              | Easily collaborate across teams by capturing and sharing structured advising notes, meeting outcomes, dates, and content.  |
| <b>Interest Tags</b>                      | Capture student needs and interests with custom tags. Easily create reports and dashboards showing common themes to design personalized outreach at scale.   |
| <b>Mentorship</b>                         | Improve the student experience with mentoring programs that connect learners with alumni, faculty, or peers. Facilitate mentorship program fit with assessments to gather mentor skills and mentee requests. Manage mentorship relationships, interactions, and track key meetings and details with a comprehensive portal experience.       |
| <b>Mobile Student Portal</b>              | Give students one place to manage their journeys, no matter where they are. Students can quickly interact with their success team, manage appointments, view details on their care plans, and more.  |
| <b>Queue Management</b>                   | Manage drop-ins and waitlists with automatic queuing.  |
| <b>Salesforce Scheduler</b>               | Centralize advisors, faculty, and staff into one scheduling tool and simplify appointment booking for students and staff across channels. Customize appointment scheduling workflows to meet your advising model's unique needs.   |
| <b>Student Action Center</b>              | Help students stay organized with a consolidated view of relevant and timely action items – from tasks to action plans – accessible through the student portal.  |
| <b>Student Support Program Management</b> | Track student support programs and the services they provide like careers, tutoring, and well-being. Publish available support programs for students to self-discover and enroll in. Report on program and service utilization, identify trends, and assess performance.   |
| <b>Success Teams</b>                      | Support students by assigning individual advisors and advising teams while providing access to extended support team services.   |
| <b>Timeline View</b>                      | Define a chronological view of student interactions to quickly evaluate progress and launch actions.   |
| <b>Unified Student Record</b>             | Unify disparate student data – SIS, LMS, admissions, and other critical sources – into one, secure location to quickly give staff a 360° view of every student.  |

\*Separate SKU is required.

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

