



Build trusted lifelong alumni and donor relationships.

Here's how it works:

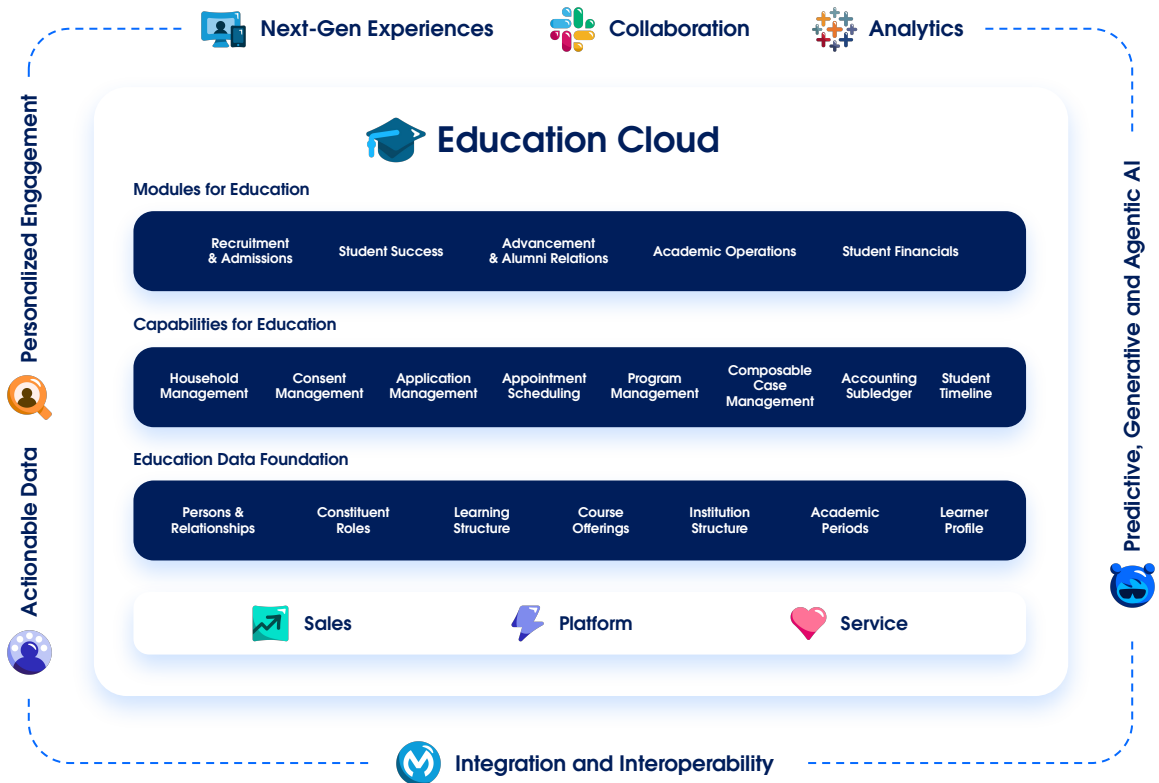
Powered by the #1 AI CRM, Education Cloud accelerates time-to-value for institutions of all sizes and makes it easier to engage alumni, streamline fundraising, and optimize operations to drive an institution-wide strategy.

- 1 Alumni Portal & Mentorship**
 Foster meaningful connections and engagement across class years and interests. Create mentorship programs and compare participants to find the best match.
- 2 Data-Driven Donor Insights**
 Drive donations and streamline portfolio management with a comprehensive view of engagement and giving.
- 3 Actionable Analytics and AI Agents**
 Visualize key metrics by activity and summarize engagement with actionable next steps. Simplify philanthropic research for major gift success with autonomous AI agents.

+33%

Increase in employee productivity

Source: Salesforce Customer Success Metrics



Learn more: sfdc.co/EDUadvancement



We designed Education Cloud with the flexibility 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 a dedicated module for advancement and alumni relations. Advancement teams have access to key features for gift planning, philanthropic research, alumni engagement, and more.

Core Solution Features

Capability	Description
360-Degree View of Alumni	Comprehensive profiles and engagement tracking for alumni and constituents.
Agentforce: Philanthropic Research	Understand key alumni and donor insights fast with Agentforce in the flow of work, including Slack. Capture insightful research summaries and assessments that highlight philanthropic interests, upcoming wealth transfers, wealth capacity and more.
Alumni Engagement Insights	Leverage the power of Data Cloud to gain insights into the impact of your alumni activity.
Alumni Journeys	Leverage multiple marketing channels to manage and enhance alumni journeys effectively.
Branded Alumni Portal and Directory	Foster connections among alumni and across class years and interests.
Campaign Management	Create and track fundraising campaigns with segmentation and attribution.
Comprehensive Gift Planning	Power complex philanthropy from intent to stewardship with a gift planning data model and structured giving lifecycles. Model complex gifts, calculate projections, and visualize gift structures all in one place.
Corporate Relations Management	Unify corporate partnerships, from sponsorships and research to internship placements, and connect them directly to measurable student outcomes. Bridge the gap between institutional advancement and industry engagement to showcase how corporate relationships drive student success and strengthen the case for long-term philanthropic investment.
Donor Insights	In-depth biographical, demographic, and relational data to allow institutions to craft effective fundraising strategies.
Financial Reconciliation	Bridge advancement transactions in CRM with finance for accurate and efficient financial management.



Core Solution Features (continued)

Capability	Description
Fundraising Rollups	Track total giving, recognition, and campaign impact with pre-built summaries.
Gift Processing	Gift recording and designated fund allocations with support for third-party payments in single and batch entries.
Grateful Patient Insights	Turn moments of patient gratitude into meaningful philanthropic engagement with a compliant, consent-driven data model. Development officers gain a structured way to identify, track, and coordinate grateful patient opportunities across clinical and advancement teams, ensuring more thoughtful outreach to individuals who want to give back.
High Impact Mentoring	Create mentorship programs, compare and match participants and manage schedules and interactions within the portal.
Pledge and Donation Management	Adapt amounts, dates, and pledge and gift schedules.
Portfolio Management	Supports tracking, moves management, and transition of ownership of donors and volunteers across internal teams.
Tribute Management	Acknowledge gifts made in honor of others.



“The dynamic stack of tools that is the holistic Salesforce ecosystem lets you meet your needs faster and therefore meet the needs of your donors faster.”

**Chris Speier, Vice President and Chief Data Officer
Texas A&M Foundation**

