



# Boost student success, retention, and wellbeing.

## Here's how it works:

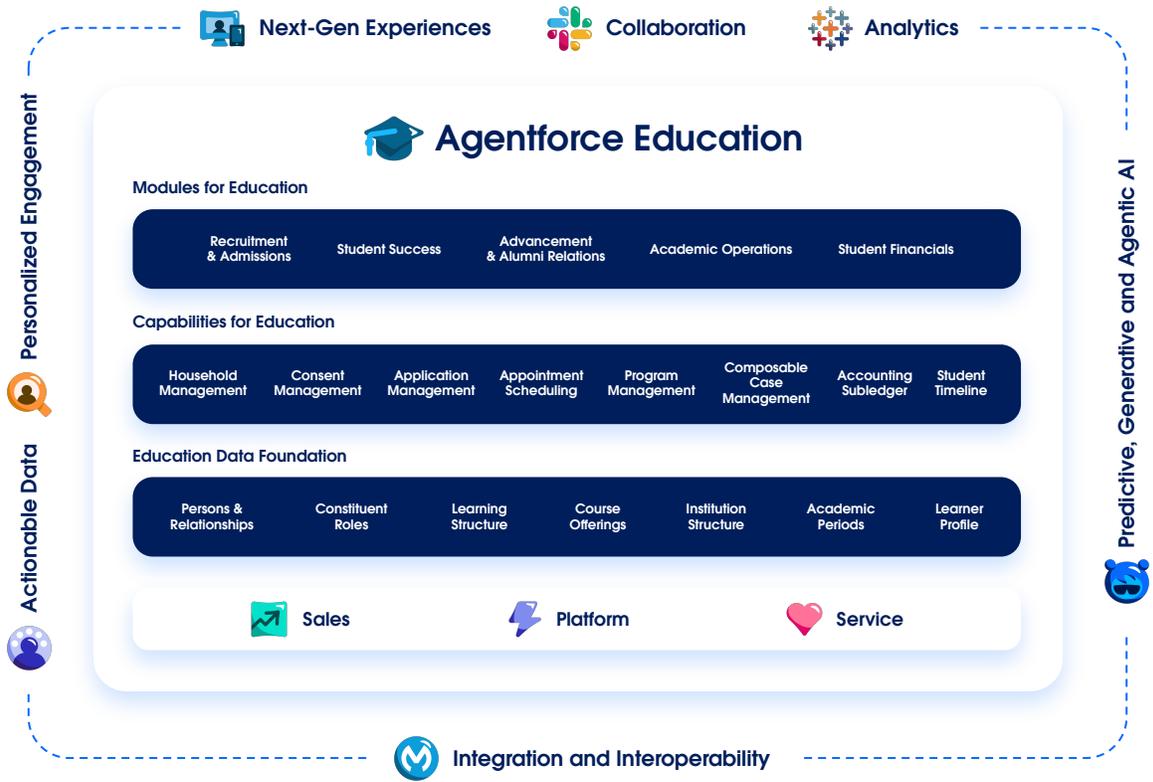
Powered by the #1 AI CRM, Agentforce Education accelerates time-to-value for institutions of all sizes and makes it easier to create personalized student experiences.

- 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 quickly intervene with alerts, care plans, success teams, and more.
- 3 **Modern User Experiences**  
Simplify appointment scheduling, track student support programs and the services they provide, and help students reach their goals with intelligent degree planning.
- 4 **Actionable Analytics and AI**  
Define your key student success indicators and use predictive AI insights and recommendations to take action. Save staff time and scale student support with AI agents.

**+15%**

**Increase in retention**

Source: Forrester: The Total Economic Impact™ of Salesforce for Education



Contact us to learn more: [sfdc.co/studentsuccess](https://sfdc.co/studentsuccess)



We designed Agentforce Education 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, Agentforce Education provides a set of core capabilities alongside a module for student success.

## Core Solution Features

Capability	Description
Action Plans and Templates	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.
Actionable Unified Search	Create filtered advisee lists and take bulk action.
Advising Workspaces	Create advising workspaces to ensure privacy, assign advisor roles, and enable collaboration.
Advisor and Director Consoles	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.
Agentforce: Advising Support	Generate comprehensive student summaries of key advising details. Obtain campus policy-based insights and identify best-fit resources to deliver proactive student support. And automate next steps like task or case creation.
Agentforce: Student Goals Guidance (Beta)	Help students achieve their career and life goals with AI-powered recommendations.
Alert Framework	Get early indicators to identify students in need and quickly intervene. Create, automate, and aggregate alerts to take action individually or at scale.
Appointment Scheduling	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.
Care Plans and Templates	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.



## Core Solution Features (continued)

Capability	Description
<b>Career Planning and Goal Setting</b>	Empower students to explore their strengths and interests, get AI-powered goals recommendations, and stay on track with actionable plans.
<b>Case Management</b>	Simultaneously unify advising data and support 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>Holistic Student Insights</b>	Visualize learners' progress faster by activating student data—academic, wellbeing, LMS engagement, and more. Take action on AI-powered insights to keep students on track and increase retention.
<b>Intelligent Degree Planning</b>	Help learners navigate degree planning with ease, ensuring a smooth path to graduation. Empower advisors to track progress, collaborate on informed program decisions, and shape each unique academic journey through an intuitive interface.
<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>Pulse Checks and Watchlists</b>	Establish a regular cadence of pulse checks to proactively capture student wellbeing. Visualize pulse check responses over time to assess which students require additional support, and add them to watchlists for ongoing tracking.



## Core Solution Features (continued)

Capability	Description
Queue Management	Manage drop-ins and waitlists with automatic queuing.
Student Action Center	Help students stay organized with a consolidated view of relevant and timely action items – from tasks to action plans – accessible through the student portal.
Student Support Program Management	Track student support programs – and the services they provide – like careers, tutoring, and wellbeing. Publish available support programs for students to self-discover and enroll in. Report on program and service utilization, identify trends, and assess performance.
Success Teams	Support students by assigning individual advisors and advising teams while providing access to extended support team services.
Timeline View	Utilize a chronological view of student interactions to quickly evaluate progress and launch actions.
Unified Student Record	Unify disparate student data – LMS, admissions, and other critical sources – into one, secure location to quickly give staff a 360° view of every student.



**“We needed a more modern system to support our work and meet students where they are in their journey. With Agentforce Education, we’re creating a one-stop shop to connect our advisors, prospective and current students, alumni, and families.”**

**Robin Bryan, AVP for Information Technology and CIO  
James Madison University**

