



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.

+15%

Increase in retention

Source: 2023 Total Economic Impact™ of Salesforce for Education

2 Personalized Student Support

Identify students in need and intervene with alerts, care plans, and success teams.

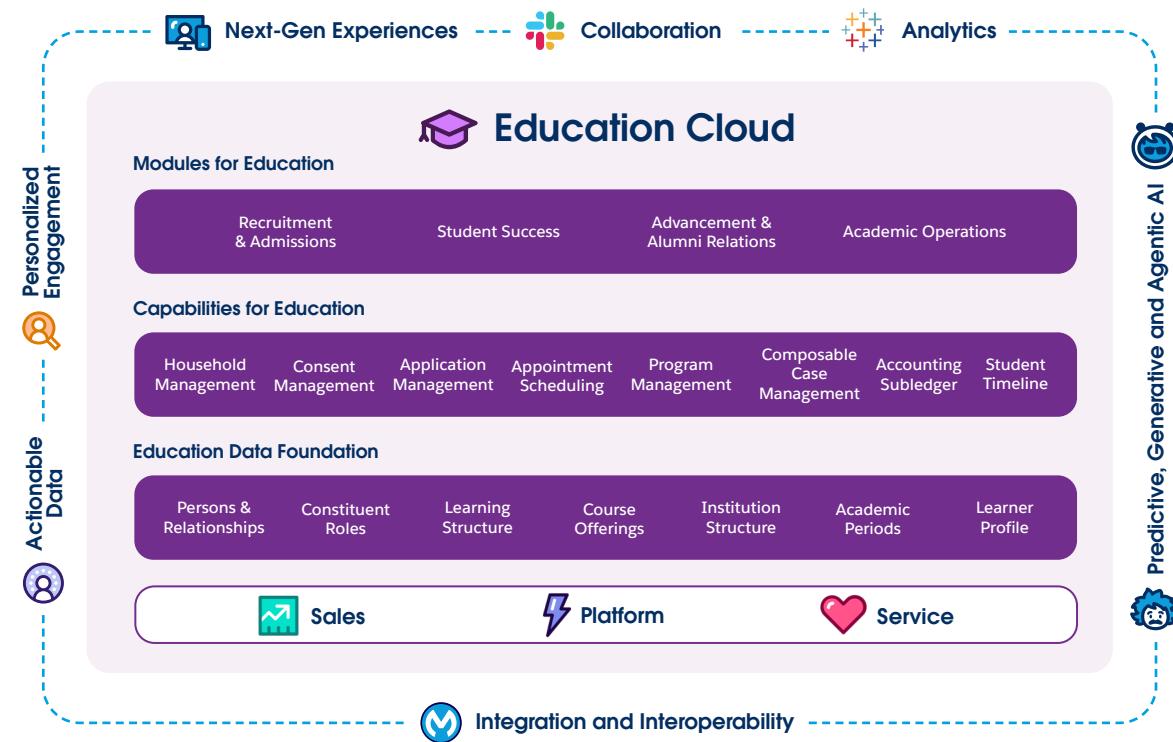
3 Modern User Experiences

Simplify appointment scheduling, track student support programs and the services they provide, and help students reach their goals with intelligent degree planning.

4 Analytics and Intelligence

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

How Education Cloud Works



Education Cloud for Student Success



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 a module for student success.

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.
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 for Education: 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 for Education: Student Goals Guidance (Beta)	Help students to achieve 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.
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.
Career Planning & Goal Setting	Empower students to explore their strengths and interests, get AI-powered goals recommendations, and stay on track with actionable plans.
Case Management	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.
Holistic Student Insights	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.
Intelligent Degree Planning	Help learners navigate degree planning with ease, ensuring a smooth path to graduation. Enable advisors to track progress, collaborate on informed program decisions, and shape each unique academic journey through an intuitive interface.
Intelligent Question Generator	Simplify support program management and increase staff productivity by using AI to generate intake questions for advising, extracurricular, and other student support programs.

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Education Cloud for Student Success (continued)



Capability	Description
Interaction Summaries	Easily collaborate across teams by capturing and sharing structured advising notes, meeting outcomes, dates, and content.
Interest Tags	Capture student needs and interests with custom tags. Easily create reports and dashboards showing common themes to design personalized outreach at scale.
Mentorship	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.
Mobile Student Portal	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.
Pulse Checks and Watchlists	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.
Queue Management	Manage drop-ins and waitlists with automatic queuing.
Salesforce Scheduler	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.
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	Define 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.

Sign up for a free trial of Education Cloud at bit.ly/EducationCloudTrial