



# Engage the Right Students Faster and Optimize Enrollment Outcomes

## Here's how it works:

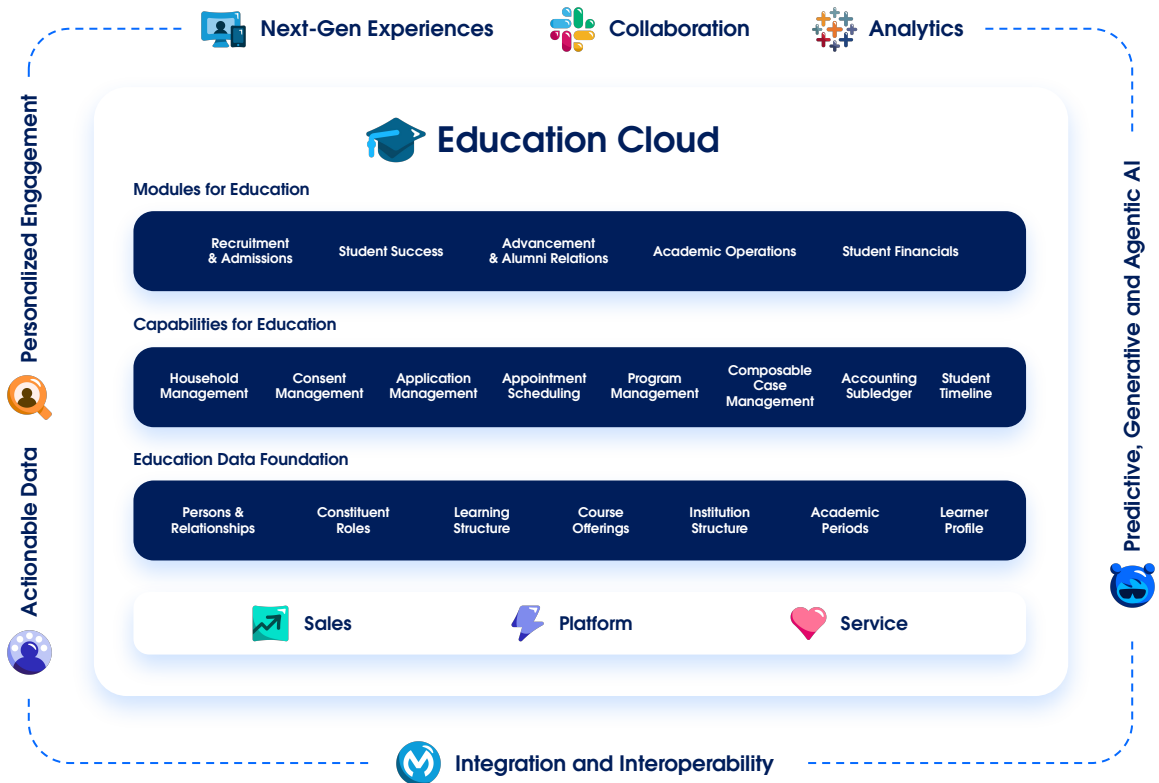
Powered by the #1 AI CRM, Education Cloud accelerates time-to-value for institutions of all sizes and makes it easier to create personalized recruitment and admissions experiences.

- 1 **Deliver Personalized Guidance**  
Answer prospective student FAQs, capture academic interest, and register students for events 24/7 with Agentforce
- 2 **Engage "Stealth" Prospects**  
Uncover hidden pipeline with predictive alerts that identify high-intent behaviors early
- 3 **Remove Application Barriers**  
Offer a seamless, mobile-friendly digital experience where students can easily search for programs, transfer credits, and find best-fit courses
- 4 **Maximize Recruitment ROI**  
Use enrollment analytics and AI-driven scoring to adapt nurture journeys and pivot recruitment strategies based on territory performance

**86%**

**Faster Decision Making**

Source: Salesforce Customer Success Metrics



Learn more: [sfdc.co/recruitment-admissions](https://sfdc.co/recruitment-admissions)



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 purpose built module for recruitment and admissions with key features to support prospective students, applicants, and staff.

## Core Solution Features

Capability	Description
<b>Agentforce: Financial Aid</b>	Empower students with 24/7 personalized guidance on financial aid inquiries, reducing staff burden and accelerating the enrollment process. Free your team to focus on high-impact counseling while students get the answers they need instantly.
<b>Agentforce: Student Recruitment</b>	Answer questions, capture academic interest, register students for campus tours, and help start their application 24/7.
<b>Agentforce: Transfer Credit</b>	Instantly estimate transferability of prior learning and guide students through official transfer credit requests. Empower precise academic planning and speed up enrollment decisions.
<b>Accelerate Transfer Credit Evaluations in the Application Process</b>	Speed up learning equivalency evaluations and reduce student wait time by requesting estimates for transferable credits directly in the application portal. Applicants can enter details of prior learning and upload supporting documents and images in each admissions application
<b>Streamline Transfer Credit Evaluations for Students</b>	Create and manage transfer equivalency relationships and the entire transfer credit process from a unified interface that automatically matches and suggests credits. Registrars can use the guided process to review submitted documentation and to articulate credit transfer requests.
<b>Admissions Console</b>	Manage key tasks and keep track of applicant activity all on one, actionable homepage.
<b>Actionable Lists</b>	Easily segment prospects for target campaigns and call downs with advanced list building.
<b>Alert Framework</b>	Ensure prospective students never miss an update or deadline with triggered notifications and reminders.
<b>Applicant Portal</b>	Create a seamless applicant experience fast with tailored portals – including mobile – deployable with clicks, not code.
<b>Application Preferences</b>	Allow applicants to rank their preferred locations and programs. Retain more candidates within your multi-campus system.
<b>Application Review</b>	Save time by quickly processing and reviewing applications from a single system.
<b>Application View, Edit &amp; Submit</b>	Enable applicant to view and edit their application at any stage, and confirm submission.

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## Core Solution Features (continued)

Capability	Description
Application Scoring	Define program-specific scoring with key criteria and make faster, more consistent admissions decisions.
Business Rules Engine	Reduce time spent on manual lookups and calculations by designing complex business rules with automated workflows.
Campus/Program Finder	Allow students to browse, search, and filter campuses and programs by location, majors, grade level and more. Display results in a list or on a map.
Care Plans	Proactively prevent summer melt with tailored care plans for every admitted student.
Case Management	Centralize prospective student support across channels and interactions.
Data Importer for Common App	Import Common App first-year suspect, prospect, application, and recommender records into Education Cloud entities with ease.
Document Checklist	Streamline document tracking 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.
Dynamic Applications	Build applications faster with reusable components and easily see where applicants are getting stuck.
Financial Aid Insights	Empower students and staff to navigate the financial aid process with a unified hub. Gain real-time insights into every stage of the aid journey from application through disbursement with personalized, agentic guidance, and seamless data integration.
Interaction Summaries	Easily collaborate across departments by capturing and sharing structured meeting notes, including attendees, dates, and content.

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## Core Solution Features (continued)

Capability	Description
OmniStudio	Drive engagement by easily designing personalized, guided form and application experiences.
Recommender Experience	Applicants can easily nominate recommenders directly from their application, collect recommendations, and save time with automated reminders instead of having to manually reach out to recommenders throughout the busy application process.
Recruitment Console	Manage your most important tasks for the day with one, actionable homepage.
Recruitment Inquiry and Opportunity Management	Make it easy for prospective students to raise inquiries and connect with recruiters on your existing website. Keep prospective students engaged with automated campaigns, seamlessly forecast revenue for students, and assign opportunities to staff.
Salesforce Scheduler	Simplify appointment and interview scheduling across devices.
Stage Management	Easily organize, visualize, and automate reviews by application stage.
Third Party Applications	Empower parents, guardians, and international agents to submit applications on behalf of one or more applicant.
Timeline View	Allow applicants and staff to reference applications and past interactions to evaluate progress.



**“Instead of traditional forms or even chatbots, our students have the convenience and personalized support of interacting with an autonomous recruitment agent directly on our website.”**

**Dr. Melik Peter Khoury, President & CEO**  
Unity Environmental University



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