

GET

STARTED

SALESFORCE FOR

STUDENT EXPERIENCE



Introduction

THE IDEAL SCENARIO,

your school is a fully connected place, a well-oiled machine where students know exactly what they have to do and whom to ask for help, faculty and staff are on the same page when it comes to processes and rules, and most commonly asked questions have already been answered in a searchable repository.

The reality for most educational institutions is that despite our best efforts, we're just not as connected as we aspire to be. Students are unaware of the many resources available to them, different offices and departments work in silos, and questions often have to be asked multiple times before a clear answer is reached.

This may seem discouraging, but take heart! All of these challenges can be addressed with just a bit of planning and customization. As educational institutions move toward a more digital approach, the Salesforce suite of solutions has a variety of tools that put that ideal scenario within reach.

In this workbook, we will cover how you and your institution can support, engage, and empower your students and staff. We'll provide you with best practices, tips and tricks, and concrete examples of just how to skill up and scale up. You'll also have interactive activities, such as worksheets and videos, to ensure you fully understand each concept and have a way to implement it at your own institution.

Table of Contents

INTRODUCTION	2	MAXIMIZE STUDENT ENGAGEMENT	21
THE SALESFORCE STUDENT EXPERIENCE	4	Get to Know Your Engagement Tools	21
Education Data Architecture	4	Identify and Use Student Segments	23
Service Cloud	5	Activity: Identify Criteria for Segmentation	24
Experience Cloud	6	Personalize Communications	25
Student Success Hub	7	How to Build Strong Email Journeys (Chart)	27
DELIVER A UNIFIED SUPPORT EXPERIENCE	8	Build a Real Community... Online	28
Student Success Hub to the Rescue!	8	Student Input and Participation	28
Activity #1: Set Goals and Metrics for Student Success Hub	14	Resource Libraries and Knowledge	29
Activity #2: Build a Sample Success Plan	14	Activity: Identify Five Commonly Asked Questions (Chart)	30
Activity #3: Identify Early Alert Reasons and Actions	15	Digital Experience Communities and Student Success Hub	30
STREAMLINE STUDENT SERVICES	16	Empower Faculty and Staff	31
Re-imagine Student Support	16	4 Steps to Building a Successful Community	31
Activity: Consider These Case Management Planning Questions	18	UNLOCK ACCESS TO CAREERS	32
A Seamless Student Experience	18	Four Pillars of Success	33
Articulate Your Strategy	18	Advising	33
Create a Feedback Loop	19	Education	33
Bring in the MVPs	20	Tracking	34
		Events	35
		CONCLUSION	37
		ADDITIONAL RESOURCES	38





The Salesforce Student Experience

The **Salesforce ecosystem is extremely flexible** and can fully accommodate everyone involved in creating a successful student experience. While your institution's unique needs may vary, here are a few Salesforce solutions that are commonly used in the student-experience space. Please note that we will be focusing solely on Salesforce tools; [however, you can find additional solutions that extend Salesforce functionality on the AppExchange](#).

Education Data Architecture

What is it - [Education Data Architecture \(EDA\)](#) is the foundation of Salesforce.org Education Cloud. It provides a flexible framework that is entirely customizable for your institution's unique needs. EDA offers education-specific objects and automation, pre-configured to work for educational institutions of all sizes. .

Why is it relevant to Student Experience? - All education-specific products at Salesforce.org start with this architecture. As we continue to innovate, everything we create is built on EDA. If you extend your functionality via the AppExchange, you will find that many partner solutions are also based on EDA. To learn more about which apps leverage EDA, check out our [EDA Readiness Initiative](#).

✦ ✦ ✦ FEATURE HIGHLIGHTS

The **Program Plan** and **Program Enrollment** custom objects allow students and support staff to keep track of progress toward graduation and provide an overview of all required coursework.

The **Affiliations** custom object links students to their major department, as well as any extracurricular activities in which they are involved.

The **Relationships** custom object links students to other contacts, such as their parents, siblings, or mentors.

Service Cloud

What is it - Service Cloud is an integral part of the Salesforce platform. It is a powerful tool for student support. Through a variety of channels, including email, social media, and telephony, Service Cloud allows for the creation, routing and management of cases. A case can be any query, comment, or piece of feedback submitted by any student, or their parent or guardian. Service Cloud also has tools that support self-service and enablement.

Why is it relevant to Student Experience - Student support and enablement is central to creating a positive student experience. As such, the tools provided by Service Cloud allow both students and staff to be more proactive and efficient.

FEATURE HIGHLIGHTS

Knowledge Home

Knowledge

Published Articles

New Publish Assign Archive

5+ items • Sorted by Article Title • Filtered by all knowledge - Language, Publication Status • Updated a few seconds ago

Search this list...

Article Title

Summary

Article Nu...

Langu...

1

☐

About the Alumni Association

000001191

English

2

☐

About the Alumni Association

000001100

English

3

☐

Application Deadlines

List of important dates for 2017/2018

000001213

English

4

☐

Applying for an Assistantship or Fellowship

000001225

English

5

☐

Applying for Financial Aid and Scholarships

000001222

English

Knowledge

Draft Articles

New Publish Assign Archive

5+ items • Sorted by Article Title • Filtered by all knowledge - Language, Publication Status • Updated a few seconds ago

Search this list...

Article Title

Summary

Article Nu...

Langu...

1

☐

Applying to Connected U as a Transfer Student

000001221

English

KNOWLEDGE to create a knowledge base of common questions and provide self-service resources.

Web-to-Case Settings

Use a simple web form or a self-service customer community to make it easy for customer For detailed information on setting up Web-to-Case or Self-Service Community templates

Basic Settings

Enable Web-to-Case ☒ *i*

Require reCAPTCHA Verification ☐ *i*

Default Case Origin Web *i*

Auto-Response Email Settings

Default Response Template Auto-Response Email *i*

Hide Record Information ☐ *i*

Email Signature

Email-to-Case Settings

i To create cases from Outlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service After you enable Email-to-Case, you can't disable it. You can, however, disable the On-Demand Service.

Enable Email-to-Case ☒

Notify Case Owners on New Emails ☒

Enable HTML Email ☒

Set Case Source to Email ☒

Save Email-to-Case attachments as Salesforce Files ☐

Send Emails from Cases

Insert Thread ID in the Email Subject ☒

Insert Thread ID in the Email Body ☒

Place User Signatures before Email Threads ☐

On-Demand Service

On-Demand Email-to-Case enables your organization to automatically create cases from email without having you salesforce.com.

Enable On-Demand Service ☒ *i*

Failure Response Settings:

Over Email Rate Limit Action Bounce message

Unauthorized Sender Action Discard message

SETTINGS

SOCIAL ACCOUNTS

Social Customer Service Settings

Edit

☒ Enable Social Customer Service

☐ Enable approvals for social posts *i*

☒ Enable retrieval of parent posts for added context

WEB, EMAIL AND TWEET-TO-CASE for quick and easy case origination that makes sense to prospective students.

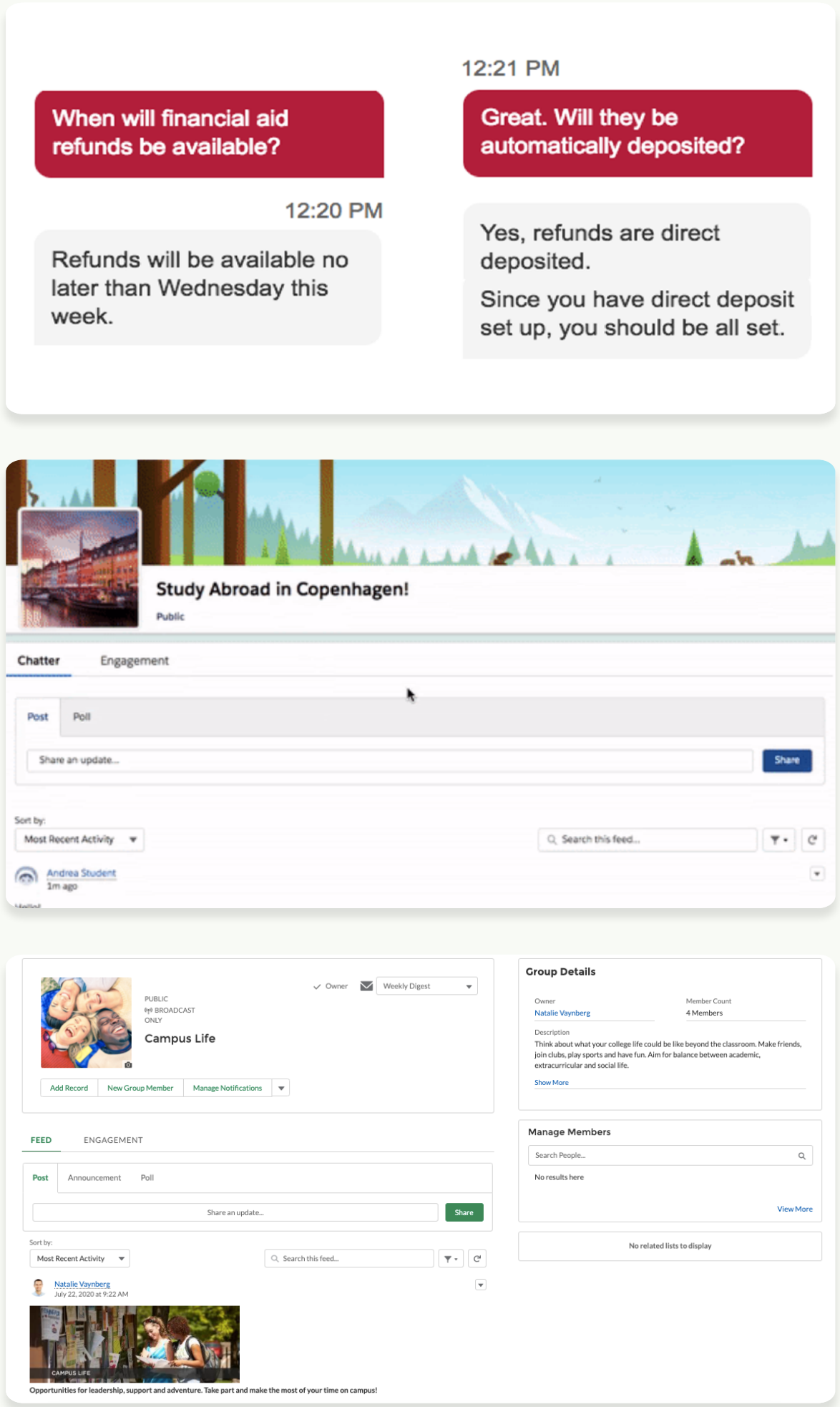
Experience Cloud

What is it - Digital Experiences are branded virtual spaces for your staff and students to connect. A step up from a traditional portal, a community is interactive, flexible, and can be quickly and easily built from a template or from scratch. Communities are made up of components that range in theme from asking for help to connecting with others. Some examples include a chat component that allows a student to quickly connect with support staff, a variety of groups that students can join to interact with their peers, and carefully curated topics that group articles and discussions into browsable and searchable categories. Virtual communities are especially important in times when real-life community building is not possible.

Why is it relevant to Student Experience - One of the most common challenges in student services is siloed information. Various resources may exist to support students, but they are not aware of them until it is too late. On the other side, one department may have information that conflicts with what another department shares. This can leave students frustrated and spending way too much time going from office to office to get a straightforward answer. A community can remove these barriers and create a seamless experience, where students can easily reach out to the appropriate staff member and quickly search for answers, while all staff stays on the same page and standardizes their communications.



FEATURE HIGHLIGHTS



CHAT and **EINSTEIN BOTS*** for facilitating easy communication between students and support staff.

CHATTER for ongoing collaboration, recognition badging, and an informational feed.

GROUPS for allowing students to self-organize, connect with peers, and easily find relevant resources.

**These products are add-ons and may require additional licensing*

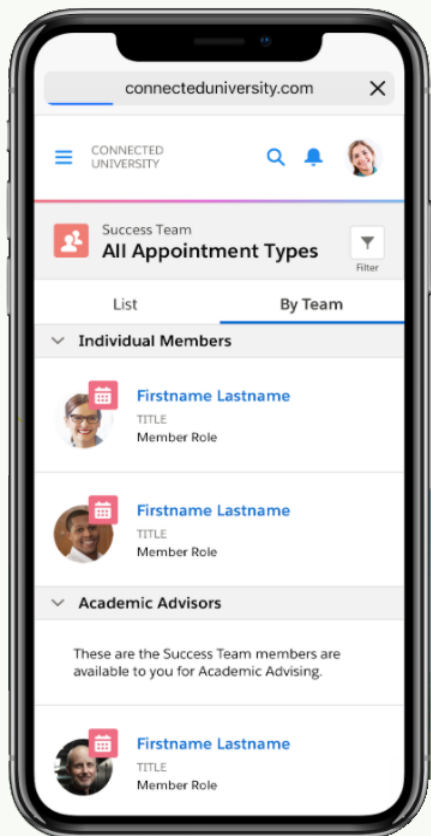
Student Success Hub

What is it - Student Success Hub gives students and support staff the tools they need to help foster focused conversations about educational success. Students can quickly and easily connect with their support staff whenever they need, while staff can spend more time on strategic engagement, support, and follow-up, instead of trying to find ways to get students in the door.

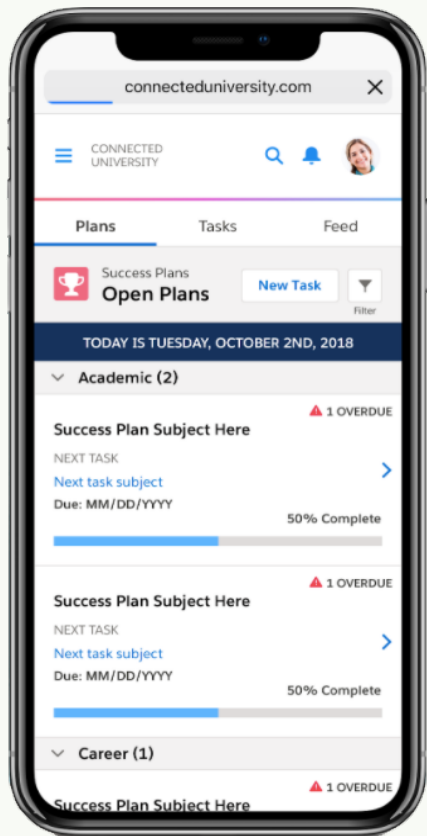
Why is it relevant to Student Experience - Student Success Hub was built with student experience in mind. Utilizing EDA, Service Cloud, and Digital Experience Pages, Student Success Hub puts the focus on building a strong and effective relationship between students and the support staff teams. These relationships are the foundation to a student’s academic and social success. Student Success Hub has also included Zoom functionality for every scheduled meeting, making it easier than ever for support staff to connect with students virtually.

Students can quickly and easily connect with their support staff whenever they need, while staff can spend more time on strategic engagement, support, and follow-up, instead of trying to find ways to get students in the door.

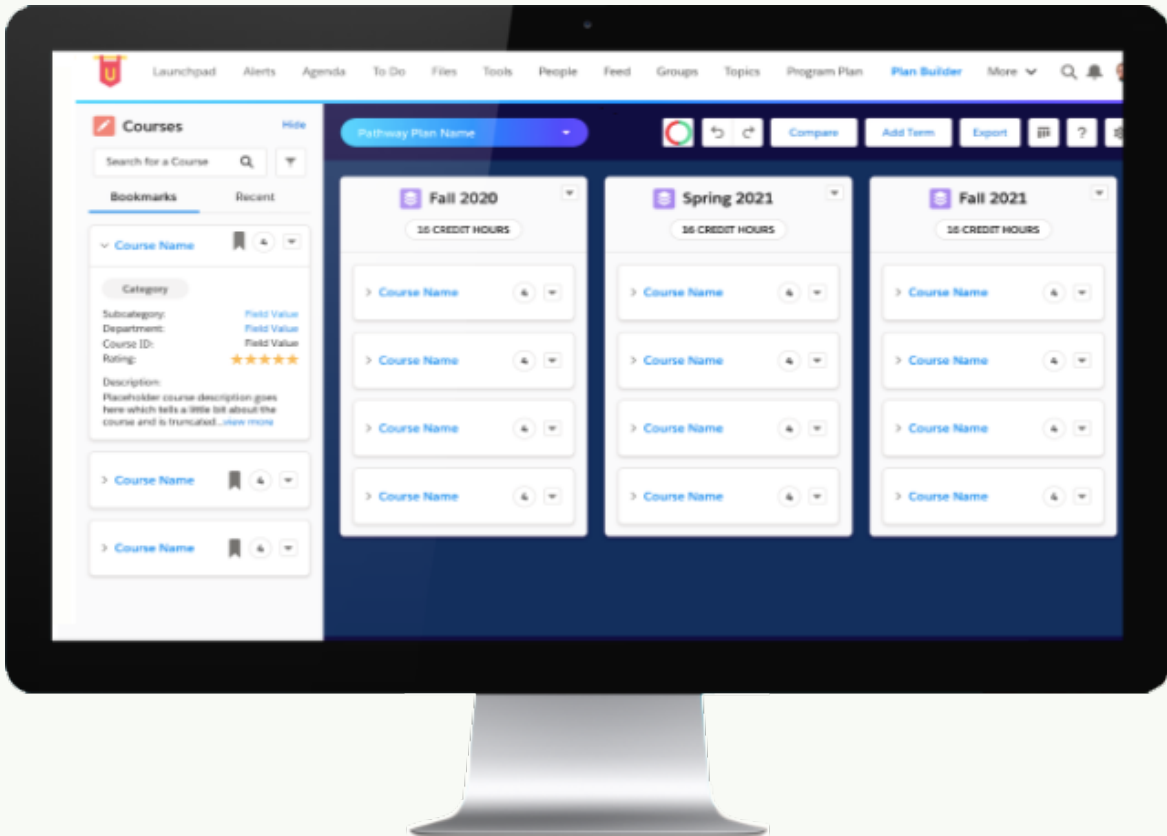
FEATURE HIGHLIGHTS



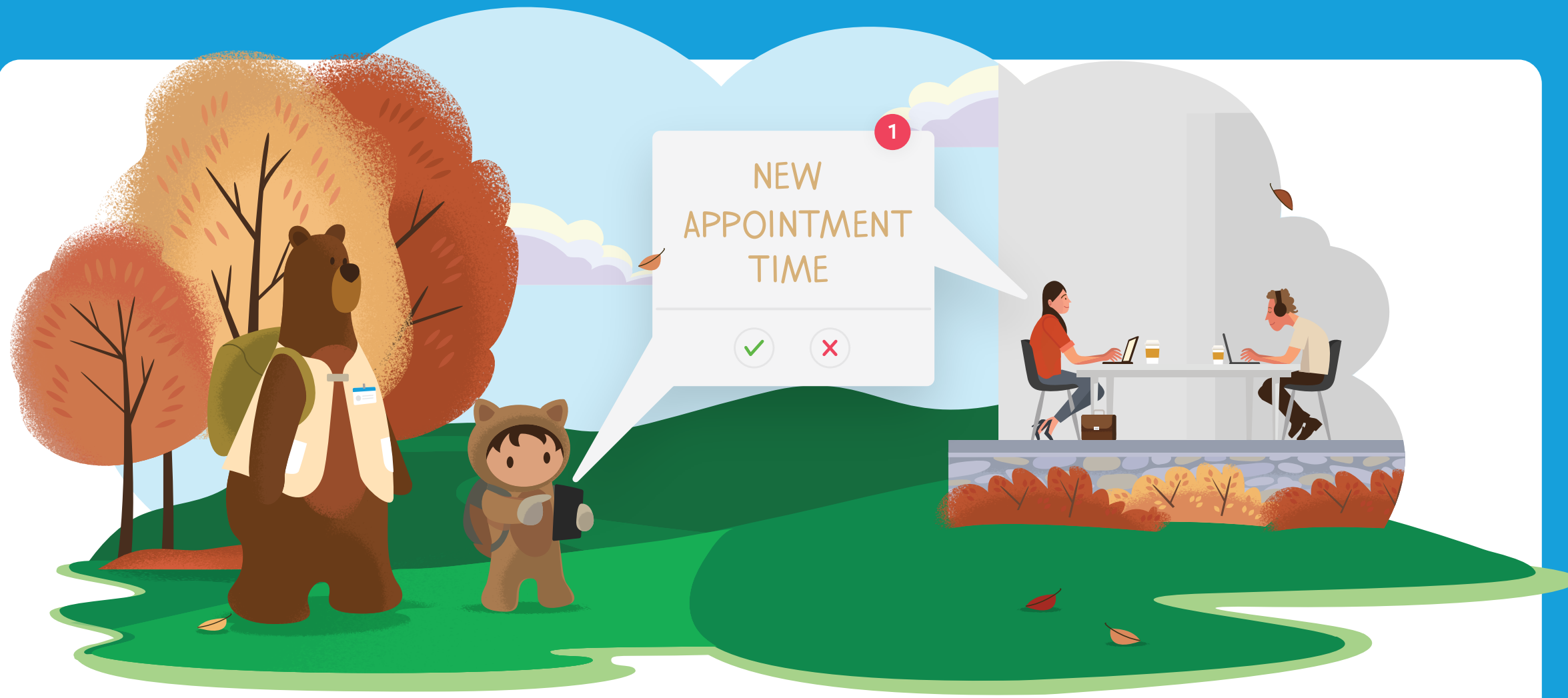
SUCCESS TEAMS give students a run-down of who is available to support them–this can include academic, career, health or financial-aid support staff. Putting this information at a student’s fingertips means they are much more likely to reach out when they need help.



SUCCESS PLANS keep students informed of what they need to do to successfully reach a goal, such as applying to a study-abroad program or securing research funding. At the same time, support staff are able to send reminders and stay in the loop about where a student is in the process.



PATHWAYS visually summarizes the requirements for earning a degree. Students can picture their academic options right from the get-go, plan one semester or eight, and navigate their decisions more confidently, all in collaboration with support staff.



Deliver a Unified Support Experience

One of the most important components of the student experience is support. As anyone who has worked in higher education knows, students have a lot of questions! It's no wonder, as even a small institution can be difficult to navigate. There are deadlines to meet, forms and applications to submit, and challenging coursework to complete. All of these challenges are made more difficult when they must be navigated remotely.

Support staff know the challenges. They are working hard to make students feel heard and improve processes. But they face challenges of their own. Data is in silos, which means that not everyone has access to the same information. What's more, too much time is spent on managing processes and fielding basic questions.

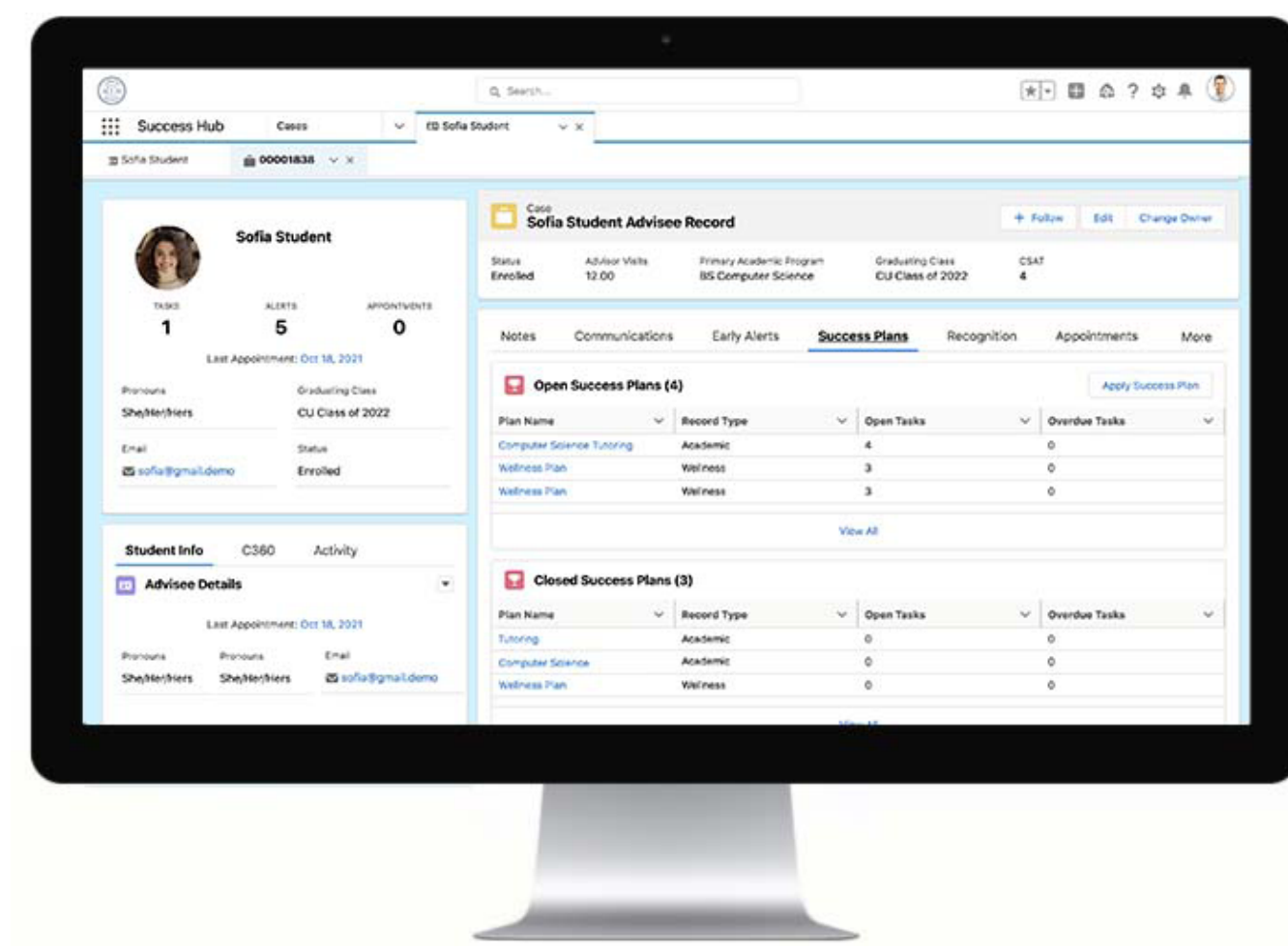
Salesforce has the support tools necessary for support staff and students to make the most of their time together.

Student Success Hub to the Rescue!

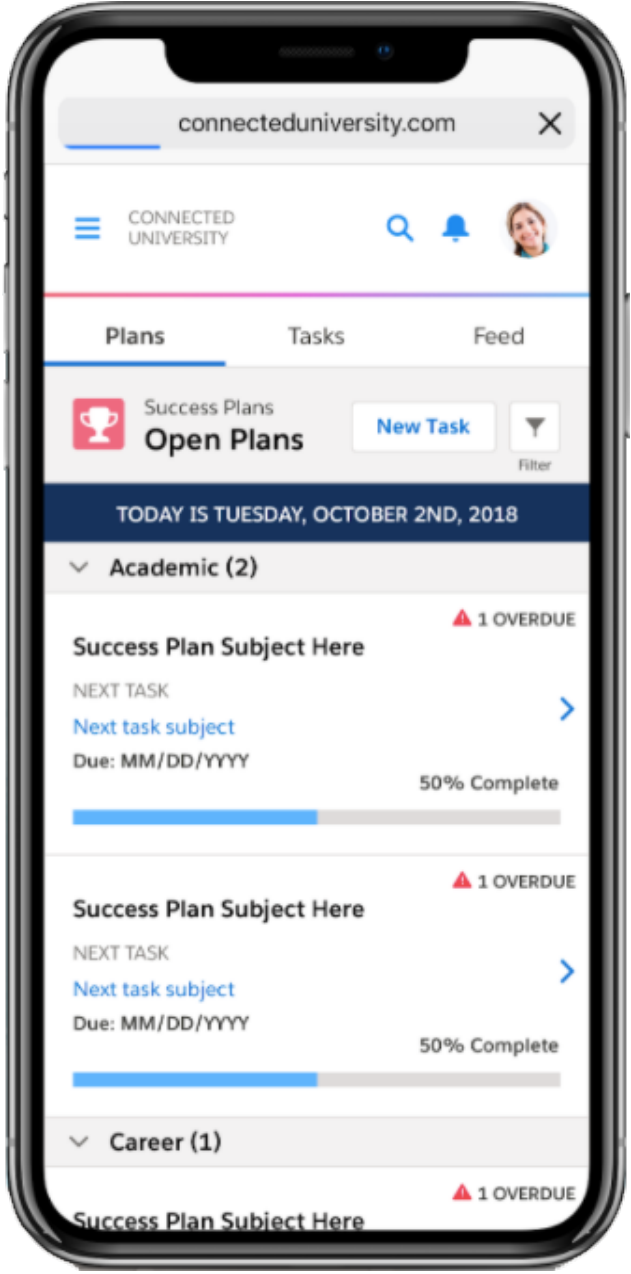
You got a quick glimpse of Student Support Hub in the previous section, but there is so much more to explore. When it comes to student support, there is no better tool!

Built in collaboration with real higher education customers, Student Support Hub uses the Education Data Architecture (EDA), Service Cloud, and Experience Cloud we outlined above to provide support staff and students all the tools they need to succeed.

UNIFIED SUPPORT RECORD - It all starts with a unified view of a student. Instead of having to search through disparate databases to find basic information about a student, support staff can now see everything they need in a single view. Need to find out what courses a student is currently taking? There they are! Want to see what other concerns or questions have come up for them? All of their prior cases and appointments are right at your fingertips! You can even get a quick overview of a student's overall status with the flexible snapshot—a tool that allows you to add a counter right at the top of a student record, tracking any success plans, appointments, or alerts that they may have pending; the snapshot is customizable, so you can always switch out the counters to see what's most important to you. All these time-savers mean that you can spend less time searching for information and making calls to colleagues, and more time actually engaging with the student.



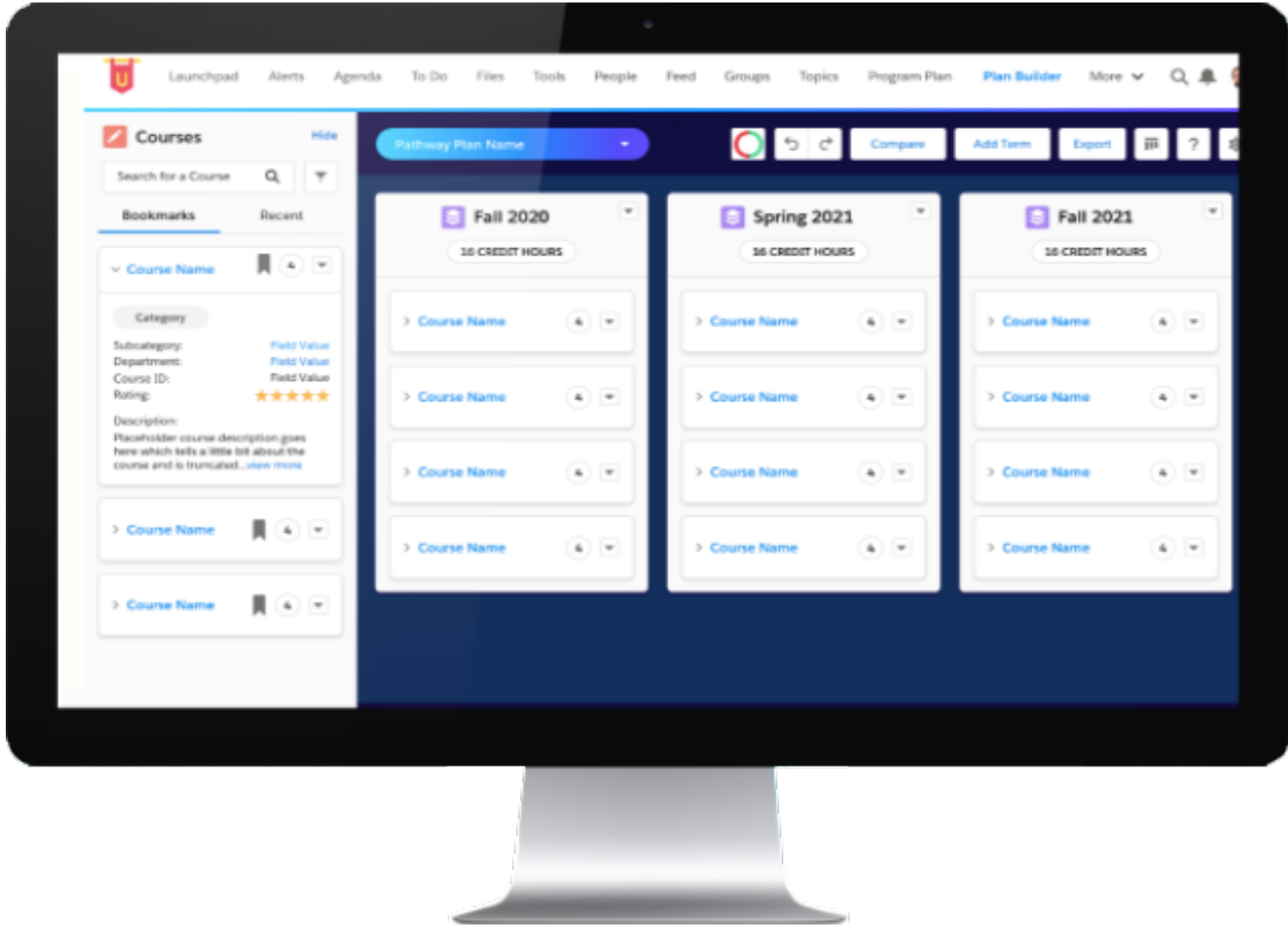
SUCCESS PLANS - We already know that students have a lot competing for their attention—classes, extracurriculars, parents and friends. How can you help them keep track of their academic expectations? Success plans make it easy. With this handy feature, you can create a plan for any multi-step process that a student might have to complete. For example, you can outline all the steps necessary to apply for study abroad, find research opportunities, or complete the requirements necessary for academic probation. Each ‘step’ is then created as a task in Salesforce. What’s more, support staff can even share their best practices by creating Success Plan Templates and sharing them with their colleagues. When relevant, the Success Plan can be added to a student and they can be notified of exactly what they need to complete and when. With Success Plans, students can stay on track while support staff can be part of an ongoing conversation around their students’ goals.



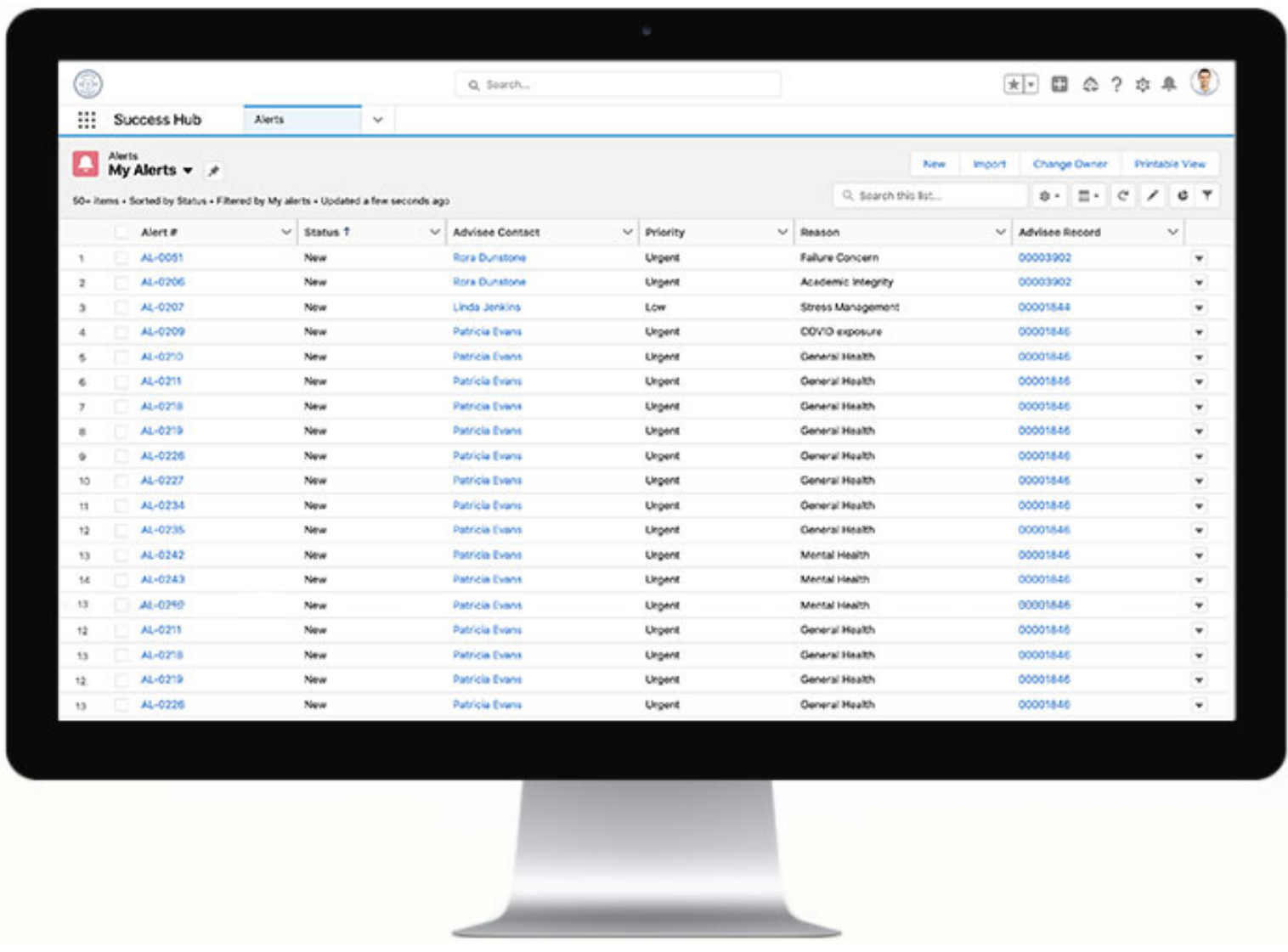
Here are some tips for designing your Success Plan:

- 1. Identify a multi-step process that many students go through.
- 2. Briefly outline each step.
- 3. Collaborate with colleagues involved in the process and confirm information relevant to them (for example, applying for study abroad may require registrar approval, academic sign-off, and financial aid considerations).
- 4. After you’ve created your Success Plan, ensure that every step is up-to-date by creating a feedback loop for anyone involved in the process.

PATHWAYS - Remember how students and support staff once had to search through giant PDF documents to figure out degree requirements? Pathways makes that a thing of the past by providing an interface that visually summarizes the requirements for earning a degree at your institution. Being able to picture what’s coming in the semesters ahead is a huge benefit for students—it allows them to better plan and make decisions more confidently. For support staff, Pathways provides the opportunity to connect with their students on a regular basis, keeping an ongoing check on their progress.



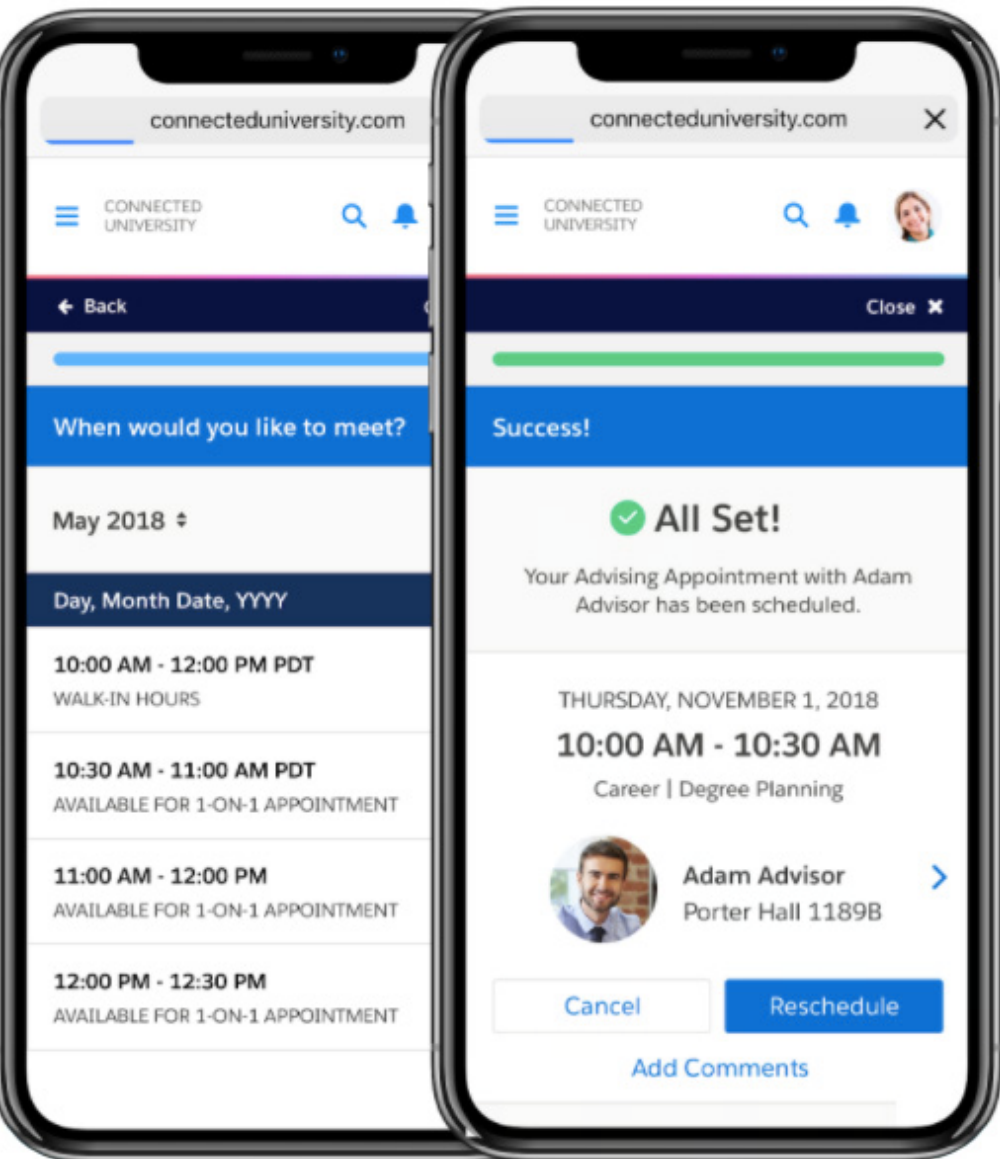
EARLY ALERTS - This is a great way for support staff to catch issues as they arise. If you can identify a common marker of a potential problem, you can create an alert for it. For example, you may have an alert that is triggered by two or more missed classes. In that case, when a student has missed two or more classes, relevant support staff can be notified and can then follow-up with a suggestion to schedule an appointment. One of the most important features of Early Alerts is that they integrate with other systems. That means that alert triggers don’t only have to come from Salesforce data—for example, if you use Peoplesoft to enter grades, a problematic grade entered can set off an alert in Student Success Hub.



Here are some best practices to consider so that you can fully leverage Alerts:

- Create alerts around common issues. (***Hint:** You'll need to collaborate with different support staff team members to identify these!*)
- Build list views for each alert–this makes it easy to take mass action on every flagged student, such as assigning a success plan!
- Automate follow-up, such as sending an email after a specific milestone.

APPOINTMENT SCHEDULING - Speaking of appointments, this is a major pain point for many institutions. Not only does the appointment tool need to be quickly and easily editable, but it also has to integrate with both the support staff calendars and Salesforce, so that you have the most up-to-date and complete picture of your student records. The Appointment Scheduler tool in Student Success Hub does all of the above and more.



Here are just a few of the great features that you can enable:

- Include a Zoom meeting link automatically.
- Flex Scheduling allows support staff added flexibility, for example accepting appointments on specific topics during designated times or seamlessly transitioning from in person to online appointments.
- Designate appointment topics (***Ex:** career services, academic services*).
- Create a Virtual One-Stop Shop by configuring existing Queuing functionality to include an automated email, letting students know it's their time to be seen.
- Specify appointment preferences (***Ex:** appointment length, location, and required notice time*).
- Place the Appointment Manager component onto your advisor Utility Bar for easy reference and maintenance.
- Use Group Appointments to add additional people to new/existing appointments– appointment manager will reflect all attendees and all attendees will receive email communications regarding any changes.
- Share calendars with colleagues to collaborate on support (***Ex:** A student meets with a career counselor about their career path, then wants to follow up with an academic support staff team member to make sure their coursework is on track to meet career goals*).
- Enable third-party scheduling support so that your front-desk staff is able to schedule appointments on the behalf of other support staff.

ADVISING MODEL	WHO IT APPLIES TO	USE CASE
Assigned Support Staff Member	Support staff with assigned student case loads	A student is assigned an academic support team member for the entire length of their academic program
Assigned Pool	Support staff offices that work as a team to support a specific group of students	A student wants to talk about internship opportunities, she reaches out to an available career counselor in her college
Unassigned Pool	Group who support most or all students	A student makes an appointment with the financial services office, his case is routed to the first available support staff team member
Queue/Waiting Room	Support staff (of any kind) that hold walk-in/office hours	A student comes in for Pre-Med services office hours; she checks in and waits her turn

It's important to note that Student Success Hub is designed to work with multiple support models. The chart to the left is a quick overview of the supported models.

Whether your institution is large or small, whether you have assigned support staff or supporting pools, Student Success Hub is flexible and powerful enough to work for you.



Implementing and Getting Started with Student Success Hub

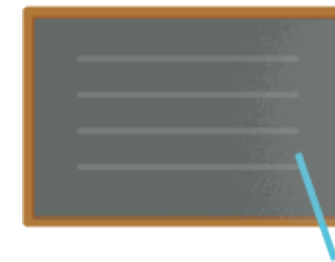
If you are new to Student Success Hub, it may be difficult to know where to start. Consider the steps outlined below to guide your way.



STEP 1

Learn about Student Success Hub

- Understand Student Success Hub requirements
- Ensure compatibility with existing technology and need
- Review licensing and permissions



STEP 3

Train Users

- Communicate the value of the tool
- Show how they can customize Student Success Hub for specific use cases
- Give users space to communicate feedback

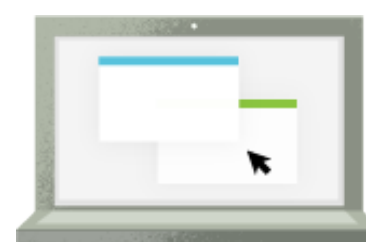


STEP 5

Track and Innovate

- Stay on top of Student Success Hub releases and updates
- Use reporting/analytics tools to track
- Implement feedback

You're off to a good start!



STEP 2

Implement

- Bring in Data
- Set up Appointment Objects/Roles/Topics
- Customize Community
- Set up support models/Success Teams



STEP 4

Engage Students

- Optimize community for Student Success Hub functionality
- Set standards for communication
(*Ex: notification frequency*)
- Stay consistent with whatever communication framework you set up

Set Goals and Metrics for Student Success Hub

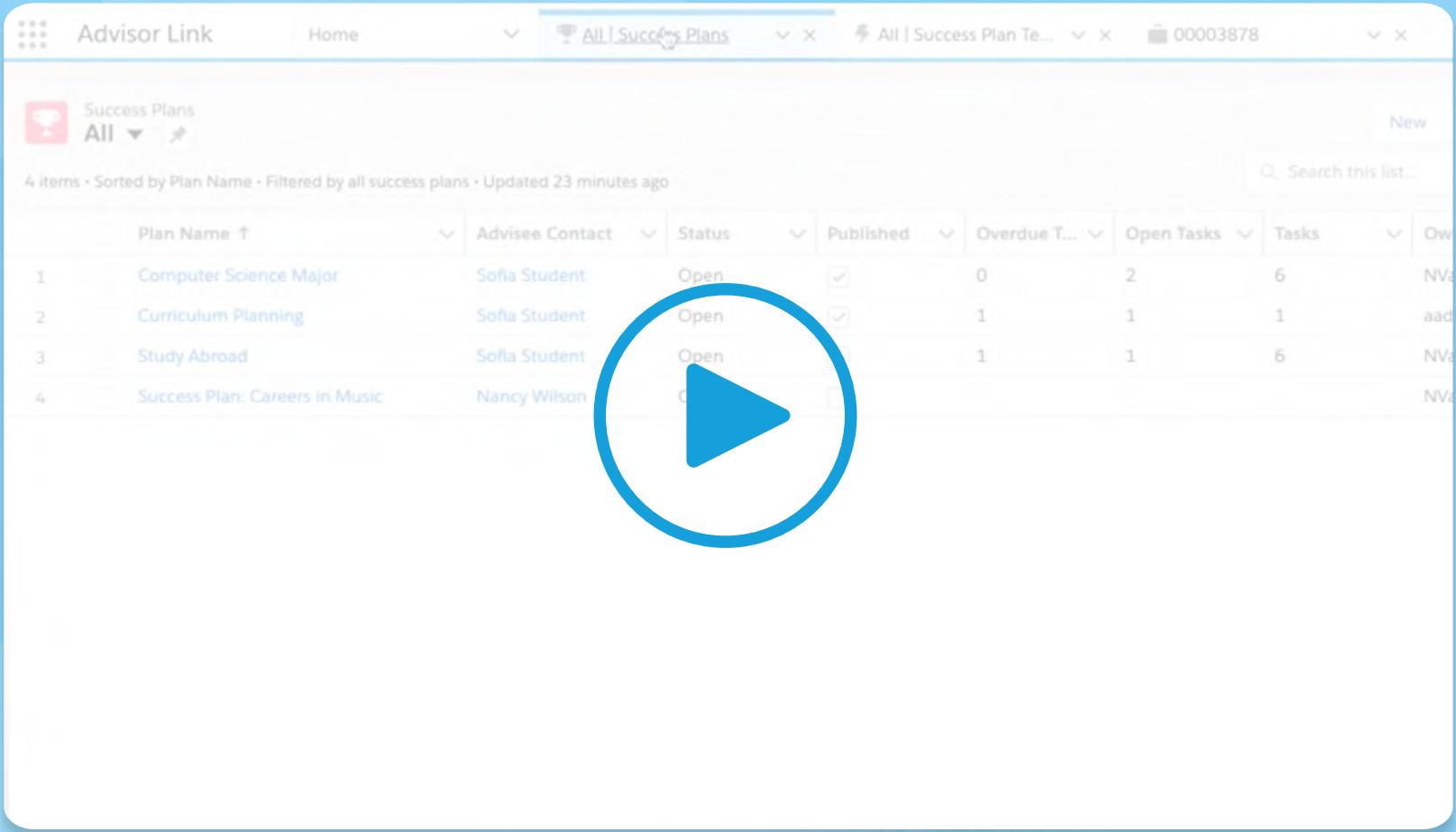
Organizational Goal: Decrease support staff case volume through Student Success Hub functionality.

STRATEGIES	METRICS
<i>Ex: Create list views for each early alert and reach out proactively with relevant information</i>	<i>Ex: % of emails opened/links clicked; % of students who take action based on the email</i>

Build a Sample Success Plan

	TASKS				
SUCCESS PLAN					

Building a Success Plan



Identify Early Alert Reasons and Actions

COMMON RISK FACTORS	RESPONSE



Streamline Student Services

Re-imagine Student Support

Higher education faculty and staff support students in numerous ways—you hold office and walk-in hours, you send emails with important information, and you do your best to alleviate problems when they come up. However, all too often the support offered to students is reactive rather than proactive. You offer help when it is needed. That makes sense, but what if you could create the infrastructure to anticipate and respond to student need better and faster?

By creating a one-stop-shop experience, you can anticipate student needs, provide them with a variety of ways to reach out, and streamline support across departments and business units. Service Cloud is at the heart of the one-stop-shop functionality.

Case Origination

The Case object is central to Service Cloud. A Case is any question, feedback, or issue that is raised by students (or parents!) It's highly likely that the most common way Cases have traditionally originated at your institution is in-person—a student has a question and they come into an office to ask it. Since this type of in-person interaction may not always be possible, it is important to note that there are other ways for students to seek help.

Here are a few ways that Service Cloud can originate cases and why they may be beneficial:

WEB-TO-CASE - Your website is already an excellent place for students to get information, but you can make it even more helpful by adding the option to ask a question right in the browser! Using Web-to-Case functionality, you can add a simple form that provides space for a student to enter their contact information and their question, and place that form on your website. When the student fills in the form and submits, a case will automatically be created in your Salesforce org and can now be dealt with by the appropriate support staff. For example, if a student reaches out about mock interviews, a career counselor can respond by sending a brief overview of the services their team provides and invite the student to schedule an appointment for a mock interview. ***Hint: Make your form short, ideally less than 4 fields.***

EMAIL-TO-CASE - A similar functionality is the Email-to-Case option. Instead of placing a form on your website, you embed a link to send an email, which would then originate a case. Make your email link more ‘clickable’ with the following best practices:

- Use clear/inviting text (e.g. ‘Ask a Question’, ‘Get Help’)
- Make the link visible (e.g. use bold colors, surround with a border, add a button)
- Place link in multiple places (e.g. your website, your email signature)

SOCIAL-TO-CASE - You may find that your students are posting questions or feedback about your institution to social media. Although it is less likely that their intent is to get your attention there, you can certainly give them the option to do so with the Social-to-Case functionality. Service Cloud works with Social Studio to pull the students question into a case from any of the major social media networks, such as Facebook, Twitter, Instagram, or YouTube. ***Hint: Use this functionality carefully and sparingly to avoid crossing privacy boundaries!***

Whichever case origination tools you use, consider the benefit you are providing for your students. Now they have many ways to ask for help, instead of one. What’s more, you are meeting them where they are—online, on a mobile device, on social media, etc, which means that they are that much more likely to reach out!

Case Routing

Now that a case has been submitted, what happens to it? You’ll want to ensure that you have a streamlined process in place so that your team can offer a resolution in a timely manner.

Here are some tools that you can use to streamline that process:

USE RECORD TYPES - If your Salesforce org is used by multiple colleges or departments, record types are a great way to distinguish between different case types. Record Types allow you to bundle different processes and picklist values and assign them to a specific subset of users. For example, the career team might handle their cases differently than the academic advising office—they might want to see different fields on their page layouts and use a specific group of related lists. They might also want their own set of picklist values that reflect various case reasons—resume critique, mock interview, or cover letter help. Record types allow for these variations between business units.

SET UP CASE ASSIGNMENT RULES - When a Case comes in, it should be routed to the right person or queue. For example, if a student emails asking about scholarship requirements, you would want that question to go straight to the financial aid office. Case Assignment rules allow you to set specific criteria for routing cases. If you use record types, this assignment process is made easy—all you have to do is indicate the record type (such as Financial Aid) and the case is on its way to the right team.

ESCALATION RULES - You can also set criteria for when a Case should be escalated. An escalation rule automatically reroutes a Case and can notify a user if a Case has remained open for a certain period of time. For example, you might have an escalation rule set up that notifies a supervisor if a Case has not been dealt with in a timely manner (i.e. three days, a week—you decide!) Alternately, if there are unique situations that require multiple support staff to be involved, you can specify the additional assignments or notifications that have to be made. For example, if a student is in danger of getting suspended, the registrar and financial aid services may need to be involved in working through the issue.

All of these tools work together to make sure that cases are handled properly and nothing slips through the cracks.

Q&A: Case Management Planning

Consider these questions as you begin to build.

QUESTIONS	ANSWERS
Which groups handle (or will handle) cases in Salesforce?	<i>Ex: Career Counseling, Academic Counseling, Study Abroad, Financial Aid</i>
For each of the groups you've indicated, list the types of cases that may arise?	<i>Ex: Study Abroad would include Program Selection, Visa Process, Pre-Departure</i>
For each group, will a single person be responsible for case triage or does a queue make more sense? Note: A queue means that a group of people will have access to a specific set of cases and will pick which ones they pick up.	<i>Ex: Entire Career Team responsible</i>
What is your target case resolution time?	<i>Ex: 3 Days</i>
For each group, who should be notified if that case-resolution time is not met?	<i>Ex: Team Supervisor</i>

A Seamless Student Experience

All of the tools and best practices covered in this workbook are geared toward one goal—building that fully functional and streamlined digital experience for your students. This means that students have a system that provides a streamlined, complete network of support that meets all of their needs while matriculating and beyond.

As you continue to work toward this goal, here are three simple steps to keep you on track.

Articulate Your Strategy

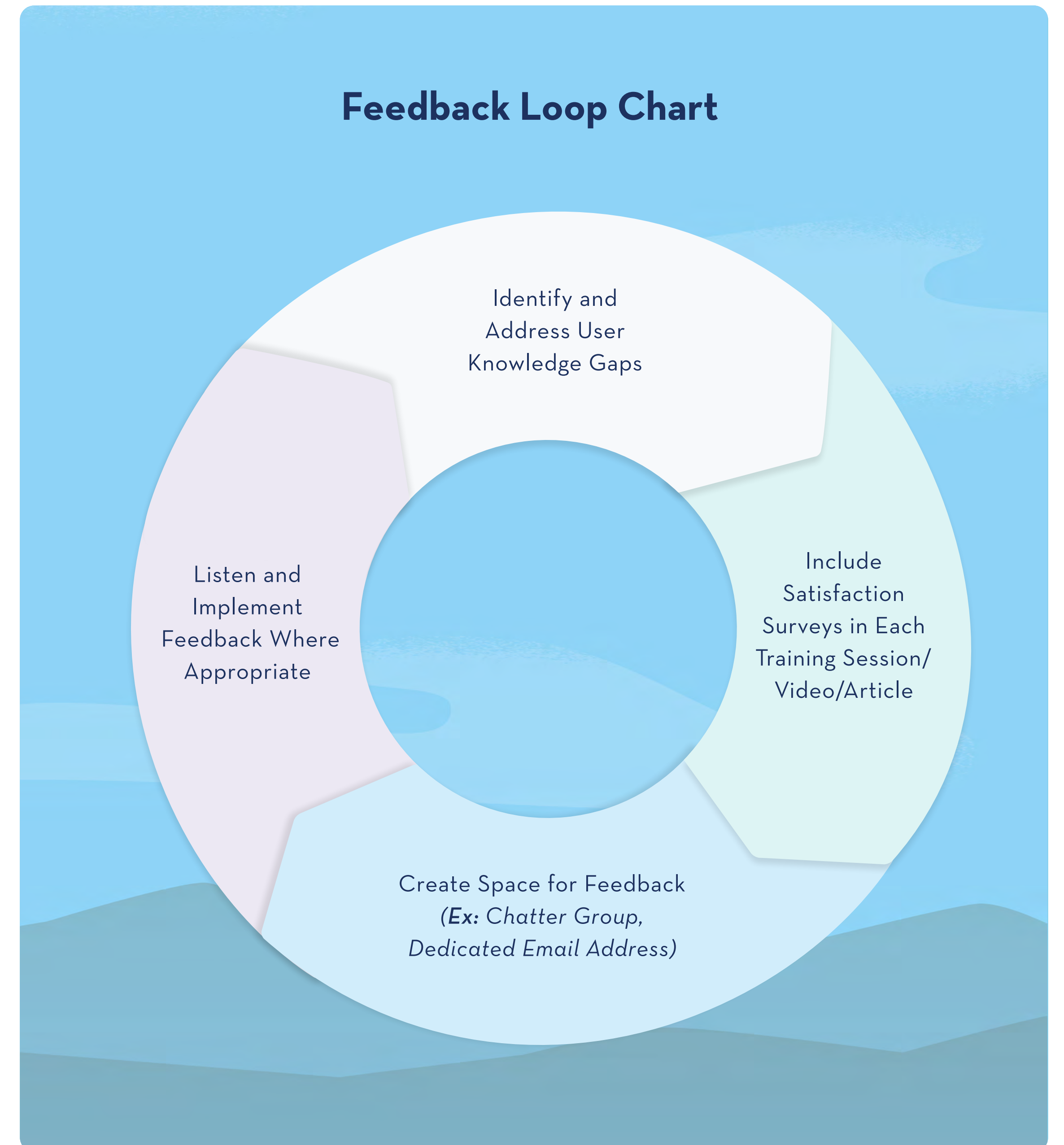
Whenever you embark on a new process, it's important to have a clear plan. It also helps to write that plan down and ensure that anyone involved in putting the plan into action is fully involved in creating it. Plan your strategy by following these four basic steps:

- 1. Set Your Goals:** You know the overall goal you are trying to achieve—a fully connected campus—but what are the milestones you want to reach along the way? Setting and reaching these milestones will build momentum and provide concrete results. As you think about what these milestones could be, consider the biggest pain points you are currently facing and decide whether they can be addressed through any Salesforce tools or functionality. If yes, include them in your planning. For example, you may find that your support staff are overloaded with too many cases, which leads you to set a goal of decreasing case volume by 10% every semester
- 2. Understand Your Challenges:** Now that you've identified your goal, consider what stands in the way of reaching that goal. It's important to understand the challenges you are facing so that you can be better prepared and mitigate them along the way. Following our example from step one, a challenge that you may come across is that even if you implement self-service tools to alleviate case overload, most people are set in their ways and it can be difficult to get them to act differently.

3. **Provide Solutions through Training and Enablement:** In identifying that challenge, you can also find potential solutions. If students are slow to seek out answers on their own, you could try making the self-service tools more visible by promoting them on your digital experience page (virtual community). If users are having a hard time switching gears, consider hosting short user-training sessions. ***Hint:** Any new process takes time to adopt—be patient and stay consistent with your messaging for best results!*
4. **Learn and Repeat:** As you work your way through your various milestones, you'll begin to learn what works and what doesn't. Make note of what's been successful and try to iterate on it in the next semester or year, while phasing out the initiatives that didn't go far. For example, if you hosted Q&As in the community and saw a good turnout, consider implementing this format for getting common questions answered on a recurring basis. On the other hand, if support staff complained that user trainings were too long and held at peak appointment times, consider offering short video sessions that can be reviewed any time.

Create a Feedback Loop

In the previous section, you started to think about your strategy and approach to creating a one-stop-shop, but this is not a process that can happen in a vacuum, everyone on your team has to have buy-in. One of the best ways to ensure participation and involvement in the process is by creating a feedback loop. If faculty and staff feel that they can freely share their concerns, offer suggestions, and have those suggestions actively addressed, they are much more likely to adopt these tools and functionality.



Bring in the MVPs

Another great way to promote your one-stop-shop experience is through recognizing and utilizing the work being done by your “super users.” Any faculty, staff, and students who are actively engaging in your community and promoting the connected experience are super users—they are helping you spread the word and helping others to get on board! Here are a few ways that you can formalize and incentivize their work:

- **BUILD AN MVP PROGRAM** - To reward super users for their work and also to give them a standardized process for better engaging and helping, you might consider creating an MVP program. This program could include recognition badges, special privileges on the community (such as additional permissions), and a unique call-out on their user photo. That’s the fun stuff, but an MVP program also allows for a more structured approach to managing and moderating your community. MVPs can help flag or delete unhelpful or derogatory posts, add topics where necessary, and curate useful content as they find it. You may be familiar with the MVP Program in the Power of Us Hub—[here is a snapshot of the program rules and guidelines that you can replicate](#).

- **ASSIGN TOPICS FOR SPECIALIZATION** - Whether or not you decide to implement an MVP program, a great way to streamline community management is to assign specific topics to experts who specialize in them. For example, you might have someone on the career services team who is highly active in your community—ask them if they would like to be responsible for the Career Services topic! Having one or two designated experts means that answers are more concise and relevant, staff from other teams are not stretched thin trying to find information on topics they’re not familiar with, and your experts can feel a sense of ownership over their area.

Your super users or MVPs are doing great work, so make sure you reward it! Consider hosting a monthly lunch, providing some annual swag, or even just calling them out in a team meeting.

- **REWARD GOOD WORK** - No matter what you call them, your super users or MVPs are doing great work, so make sure you reward it! Consider hosting a monthly lunch, providing some annual swag, or even just calling them out in a team meeting.





Maximize Student Engagement

One of the most pervasive problems on campuses across the world is that students simply do not know about the resources available to them. You work hard to provide various programming and support, but if students don't know those services exist, how can they take advantage of them? What's more, how can you know whether the work you're doing is relevant and helpful?

In order for students to have the best experience possible, they need to be properly engaged. When students are engaged they feel empowered to make good decisions and go further in their education. They're also much more likely to find and utilize various resources and participate in the campus community. In short, an engaged student body is more likely to perform better.

From a staff perspective, engaging your student body means getting to the heart of what you most love about education—the opportunity to see students succeed.

Get to Know Your Engagement Tools

Engagement comes in variety of forms, which means that you may use an array of tools to accomplish your goals. Most commonly, engagement means email communication, but it can also come in the form of SMS, social media, and digital experience communities. Whatever channel makes the most sense for you, Salesforce has you covered. Let's take a look at each channel and the tools that support it.

EMAIL - There are several options for [sending email with Salesforce](#). For simple, transactional email sending, you can use the Salesforce platform email functionality. You can **send one-to-one** emails (such as follow-ups after appointments or reminders of upcoming deadlines) or **send to a list** (update a group of students on the status of their study abroad application or let a group of seniors know that they still need to complete their PE requirement). [Learn more about sending email via the Salesforce platform here](#).

If you discover that you have more complex email needs, such as building dynamic email journeys over time or creating automated processes for follow-up, you might consider one of the Salesforce marketing automation tools—Pardot or Marketing Cloud. Pardot is generally a better fit for smaller teams as it requires less time to get up and running, while Marketing Cloud is a bit more complex but has broader functionality. Check out a quick overview of their differences and similarities on the next page.



Both Pardot and Marketing Cloud have powerful email sending capabilities, and they are both also equipped with a variety of other engagement possibilities.

SMS - Marketing Cloud users are able to automatically send SMS depending on specified criteria. For example, you might want to send a text message reminding a student of an upcoming appointment. If you do not have Marketing Cloud, you can also implement this functionality using a [third-party app via the AppExchange](#).

SOCIAL MEDIA - You might also want to interact with your students on social media. Both Pardot and Marketing Cloud have the capability to automate social media posts on specific times and dates. This could be useful for event promotions—for example, if you have a series of on-campus recruiting opportunities that you want to promote, you can schedule posts to go live on your social media channels on the appropriate dates. Scheduling your social media posts means that you can do the work when you have time and not have to worry about posting during a busy event. Beyond simply scheduling your posts, you can also get an idea of what's top of mind for your students and take appropriate action. Marketing Cloud allows you to analyze sentiment and highlights the most commonly referenced topics on your social media channels in a word cloud. For example, you might notice that many students are expressing concern about upcoming exams, and based on that information offer extended tutoring hours or more walk-in appointment times for counseling.

VIRTUAL COMMUNITY - A community is an incredibly effective tool to keep your students engaged and informed. Through a community, you can provide easy access to most commonly needed resources, allow students to self-organize into interest groups and connect with faculty and peers, and make it easy to ask for help. Salesforce digital experience pages (communities) are easy to build and can be customized to meet the needs of your unique student body.

STUDENT APPS - If you are already using communities, you can create a variety of apps targeting specific student needs. The most common example of a student app is Student Success Hub. While support staff have a console that they can access within Salesforce, students can access their Success Teams, Success Plans and tasks on their mobile device via the Student Success Hub app. Apps allow for a flexible experience and provide important information on-the-go. For example, you may create a Student Life app, where students are able to explore all available extracurricular groups, sign up for social events, and learn more about upcoming opportunities to volunteer or participate in the campus community.

Now that you've met the engagement toolkit, let's look at how you can put it to use.

Identify and Use Student Segments

You know a lot about your students—you know the courses they are taking, the clubs they belong to, and the interests they've shared with support staff. All of this information is helpful every time the student reaches out for support, but it can also be an important engagement tool, too, if it is used proactively! When you use this information to create groups of students who share certain characteristics, you are segmenting. Segmentation allows you to build lists that can then be used for ongoing communication. For example, you may want to have a list for each major available at your institution, or you may have a list of students who have expressed an interest in studying abroad.

Why Segment?

Segmentation is important because it is the precursor to personalization. An effective segmentation strategy means that you can tailor your communications to that specific group, which in turn means that your messages will be more effective. Think about it, would you be more likely to open an email that applies specifically to you, or one that is clearly sent to a mass audience?

How to Segment

There are three ways to segment your students with Salesforce tools.

1. [MARKETING AUTOMATION TOOLS](#) - Pardot and Marketing Cloud, the two marketing automation platforms native to Salesforce, have segmenting functions. All you need to do is enter your criteria and Pardot or Marketing Cloud will provide you with a ready-made list or segment.
2. [SALESFORCE REPORTS](#) - If you don't currently have a marketing automation tool, you can also segment by using Salesforce reports. Simply build a report that zeroes in on the criteria you are looking for and then export it for later use.
3. [LIST VIEWS](#) - Another segmentation option within Salesforce is creating list views. Again, you can specify the criteria you are looking for and save the view for later use. You can use list views to add segments to relevant campaigns or assign them to specific support staff for follow-up.

Common Student Experience Segments

If you’re unsure of where to start with your segmenting process, consider the following common segments:

BY INTEREST - Study Abroad - Research / Fellowships - Volunteering - On-Campus Recruiting	STUDENT DATA - GPA - Graduation Year - Major/Minor
BY SUPPORT NECESSARY - Academic Probation - First-Generation Students - Learning Disability/Special Needs	BY ENGAGEMENT LEVEL - <i>Ex: Email Opens</i> - <i>Ex: Clicks</i> - <i>Ex: Event Attendance</i>

It’s a good idea to start with larger segments, then continue to refine based on ongoing interactions with students. For example, you may start with a specific major–food science–and then split up your food science majors into freshmen, sophomore, junior, and senior segments, as well. Note that you will have crossover amongst your segments, and that’s perfectly normal.

Although segmentation may seems like a daunting task, consider that if you do this important work first, you will then create a lasting infrastructure to use for years to come.

ACTIVITY

Segmentation Criteria

Identify criteria for segmentation, provide examples of how it is useful.

CRITERIA	USE CASE
<i>Ex: Student Interest in On-Campus Recruiting</i>	<i>Send emails with information on upcoming recruiting events, tips and tricks for interviews, invitation to a workshop on resume and cover letter writing.</i>

Personalize Communications

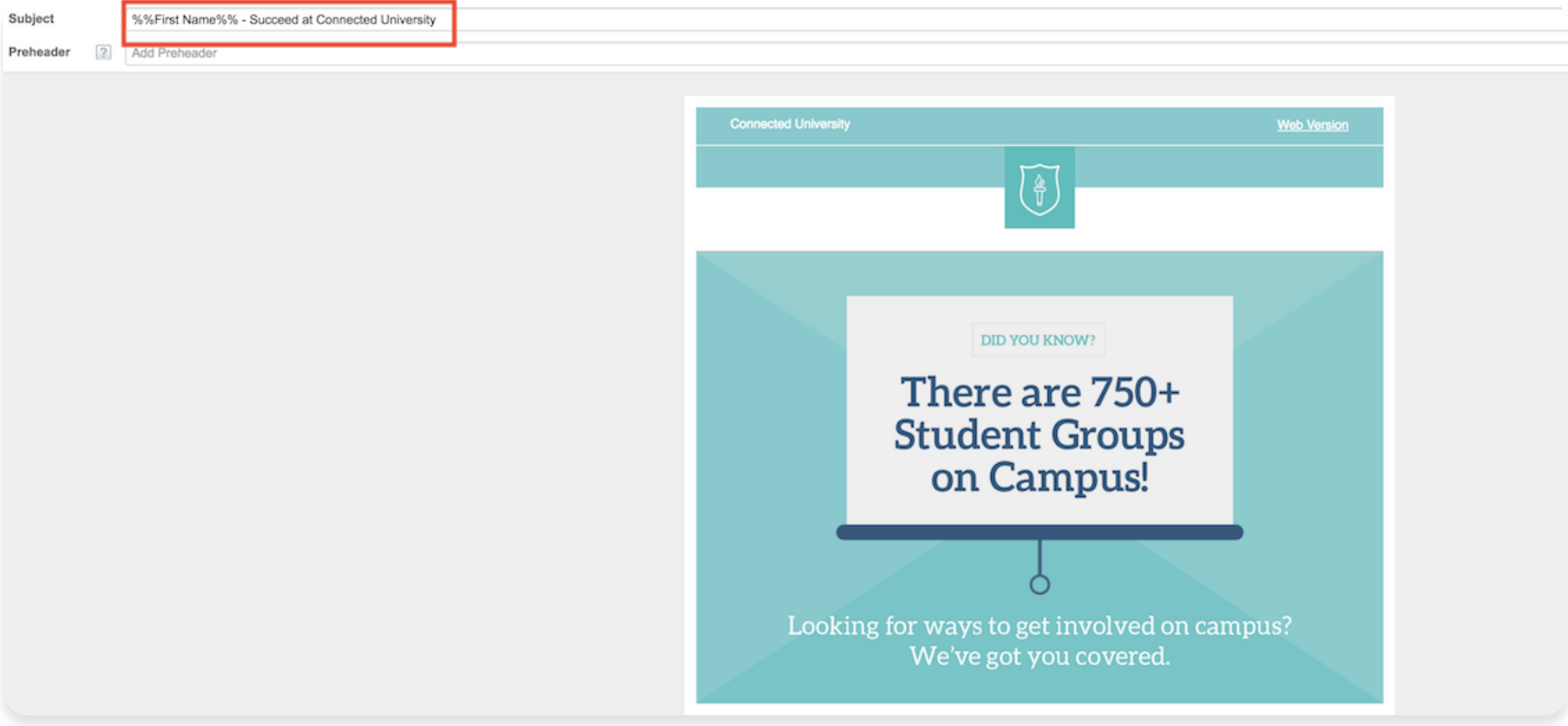
You’ve done the hard work of zeroing in on key characteristics for your students and segmenting them into groups for more effective communication—all of that work can now be put into play with personalization.

Today’s students are savvy consumers. They know good customer service when they see it and, just like all other types of consumers, they want to feel heard and understood. They want to feel that you are speaking directly to them. Personalization is at the heart of meeting them where they are.

How Do You Personalize?

The Salesforce ecosystem has numerous tools that enable personalization. The following are a few that are commonly used.

INCORPORATE RECORD VALUES - Most emails that we receive from businesses or organizations begin with “Dear First Name”—with your first name filled in. In some cases, these emails might feature information specific to us, like our birthday or our city of residence. These emails are incorporating values from our customer profile, or record, to better enhance the sense of familiarity. Students expect nothing less! Both Pardot and Marketing cloud have the functionality to directly incorporate record values into communications with students. In Pardot, these incorporated values are known as [variable tags](#) and in Marketing Cloud they are known as [personalization strings](#). If you are not using a marketing automation tool, it’s important to know that Salesforce also has the capability to pull record values into emails with the use of [merge fields](#). Besides the obvious “first name” example, you can personalize by referencing previously visited pages on your website or explicitly indicated interest in a study abroad or volunteering opportunity. If a student has engaged with financial aid or health services previously and a case has been created for that query, you might also send follow-up information on the topic. There are countless ways to make use of this functionality.



DYNAMIC CONTENT - There are likely many cases where you might need to send essentially the same information, but with one or two slight variations. In the past, this may have required hours of wasted effort, but [Pardot](#) and [Marketing Cloud](#) both have something that can make this easier—dynamic content. Dynamic content allows different groups of students to see differing information based on a set criteria. For example, if you are hosting information sessions for five different career recruiters, you might create one content block—an email or a landing page—set the student’s major as the variation determinant and enter in the differences in information that apply. In this example, each variation will have the appropriate event information for each specific major and you might also add a few additional touches, such as the recruiter’s company logo.

Default Content

The default content is shown when the viewer is not a prospect or when no variations match.

Check out our Upcoming Career Recruiting Opportunities!

Variations

Variations are based on the value of field:

Variations are checked in the order they are configured below.
The first variation that matches will display.

Variation A Remove Variation

Show when "Student Major" is

Check out our Pre-Med Career Recruiting Opportunities!

Variation B Remove Variation

Show when "Student Major" is

Check out our Life Sciences Career Recruiting Opportunities!

ONGOING EMAIL TRACKS - Perhaps the most powerful personalization tool is an ongoing email track, or a “journey.” As with the other two personalization tools, both Pardot and Marketing Cloud have their own version of a dynamic email track builder—in Pardot, it is known as [Engagement Studio](#) and in Marketing Cloud it is aptly named [Journey Builder](#). Both tools allow you to take action, then listen for a response, and based on that response, take a subsequent action. For example, you may send an email with a brochure highlighting studying abroad in Barcelona to a list of students who have shown interest. You can then set an automatic email for a few days later to only the students who did not open the email or download the brochure. If they still do not take action, you might assume that they are no longer interested and remove them from this mailing list. On the other hand, the students who did download the brochure may receive a different set of communications. Here’s the really great thing—all of this is done automatically! What’s more, personalizing in this way means that if a student has lost interest, they are not getting a slew of unwanted information for weeks or months to come.

The screenshot displays the Journey Builder interface for a journey titled "3. Student Affairs: Academic Assi...". The main canvas shows a flowchart with the following steps:

- DATA EXTENSION:** DATA_EXTENSION_NAME: 0_MASTER_SUBSCRIBERS, RECORD COUNT: 90,394, FILTER CRITERIA: GRA LessThanOrEqual 3.
- Success Email:** Initial action.
- 2 days:** Delay.
- Appointment:** Decision point.
- Appointment No.:** Path leading to "Success Engagement" and then "Appointment?".
- Appointment Yes:** Path leading to "Appointment?".
- Appointment?:** Decision point with two outcomes:
 - Appointment? No:** Leads to "Appointment?" (1 day) and then "Exit on day 6".
 - Appointment? Yes:** Leads to "Appointment?" (1 day) and then "Exit on day 6".

The left sidebar contains the following sections:

- ENTRY SOURCES:** Data Extension, API Event, Audience, CloudPages, Salesforce Data, Event.
- ACTIVITIES:** Messages (Send SMS, Send Push, Send Email), Advertising (Ad Audience, Ad Campaign), Flow Control (Decision Split, Random Split, Engagement Split, Join, Wait By Duration, Wait Until Date, Wait By Attribute, Einstein Split, Wait Until Event), Customer Updates.

Get Started: Salesforce for Student Experience

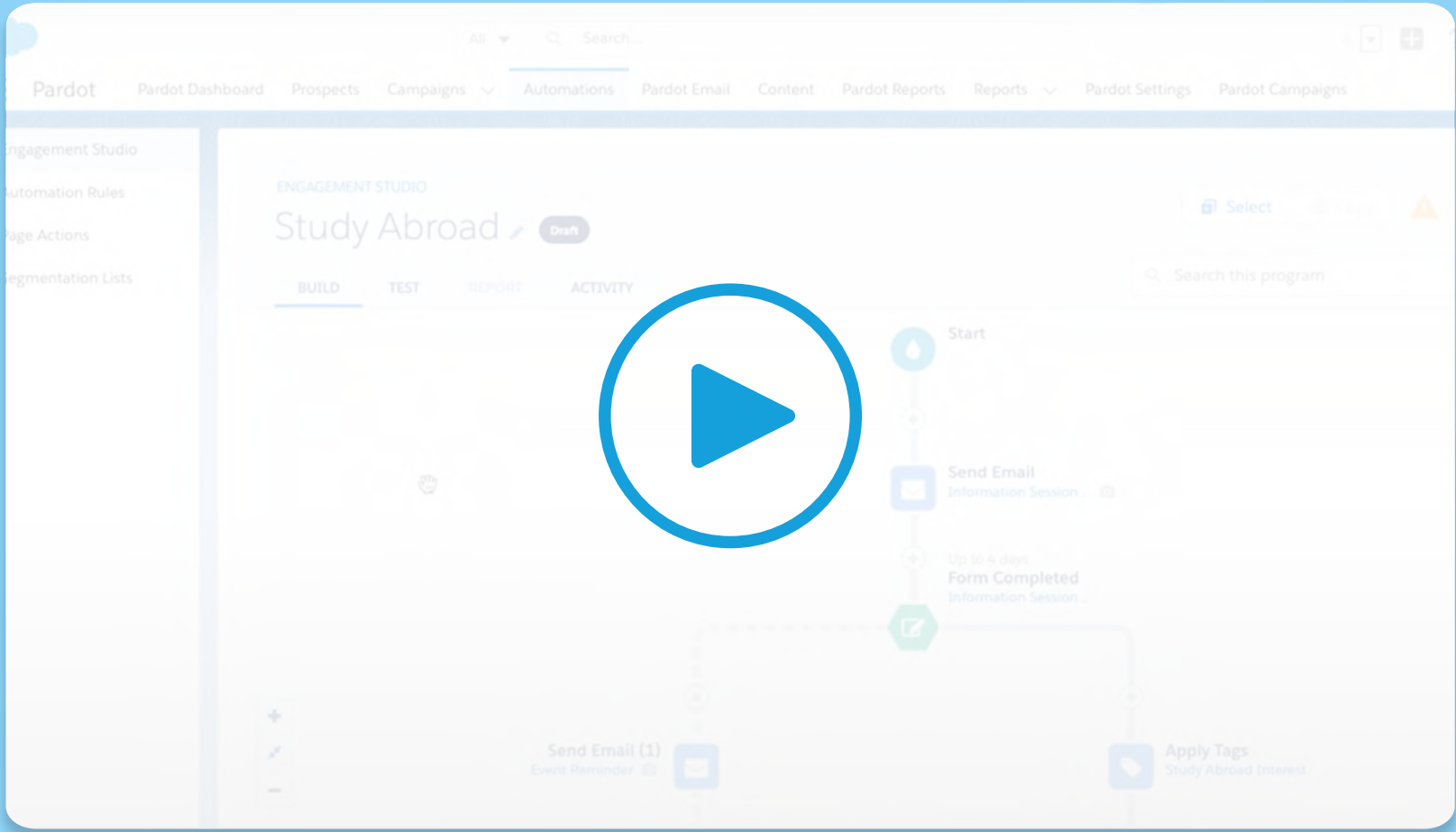
26

How to Build a Strong Email Journeys

Now that you know the basic functionality of long-term communication with your students, let’s talk about some ways to make your messages stand out.

DO	DON'T
Create engagement programs for specific segments (such as students interested in studying abroad in Spain versus students interested in studying abroad in Japan)	Forget the “No” path–have an action plan for students that do not engage at all or engage some and then drop off
Build programs with a specific goal in mind (such as sign up for an information session or download a brochure)	Only use journey-building tools as just an automated email sending machine—they can do so much more!
Link programs where it makes sense (for example, you might have a program for students generally interested in studying abroad, then break them out into their region of interest)	Skip reviewing your results periodically–this will help you iterate in the future
Plan ahead and map out your programs on paper before building them out in Pardot or Marketing Cloud	

Build a Pardot Email Journey



Build a Real Community... Online

Students are bombarded with so much information—deadlines, appointments, extracurricular activities, not to mention classwork. How can you help them prioritize and process all of this? Emails can sometimes do the trick, especially if you segment and personalize, sending only the most relevant information. But there’s also a fun, interactive way to keep your students informed and engaged—digital communities! Every university seeks to create a healthy and thriving campus community—while it’s important to do it in real life, in today’s world, it is equally as important to do so online. Let’s look at how digital experience pages can help you do that.

Student Input and Participation

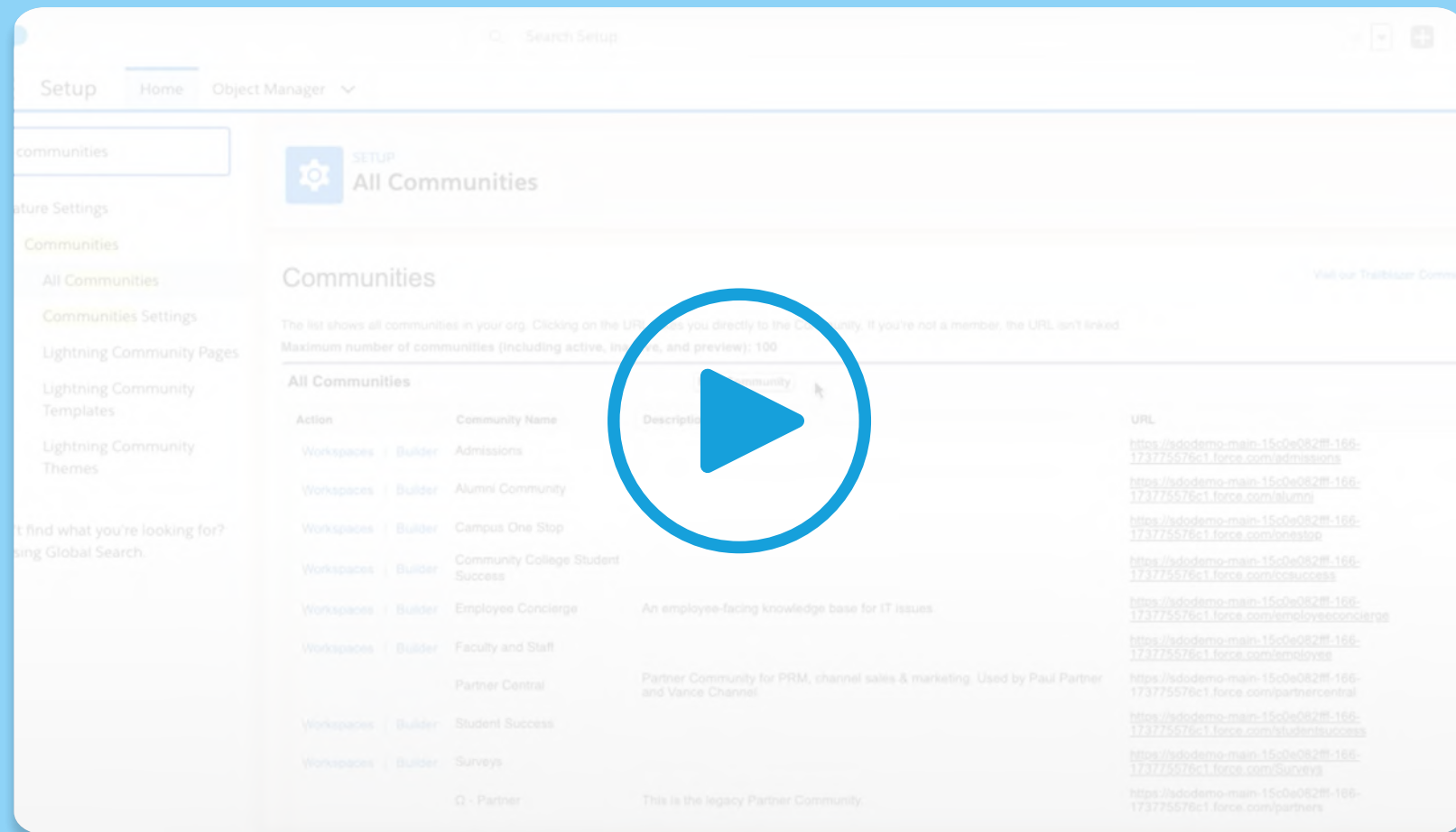
Many universities have used portals to share resources with students. For example, Blackboard allows faculty and staff to share online readings and assignments, facilitate discussions, and even post announcements and grades. While a portal is a good first step, it is certainly no community. Information is kept in separate silos, and students are mostly just the recipients of information passed down to them.

In a community, students are active participants—not only do they participate in discussions, but they actually shape how the community operates. Here are some ways that students can offer input and participate in your community:

- **CREATE AND JOIN RELEVANT GROUPS** - Students can elect to join groups that are relevant to them, both academic and fun. For example, they may join a group dedicated to their major, but also participate in a student-run group that organizes film screenings and then holds discussions. Groups can house relevant resources, such as downloadable documents or links to important websites, but they also allow students the opportunity to suggest additional resources if something is missing. With groups students can feel empowered to make suggestions, ask questions, and make connections with their peers.

VIDEO

Customize a Community



- **ANSWER QUESTIONS AND OFFER SUPPORT** - Students want to hear from other students. In a community setting, it's not only faculty and staff who can answer questions—students can do it too! In fact, this creates a much more diverse and multi-faceted experience for everyone involved. Staff can rest easy knowing that they don't have to catch every single question that comes through, and students can share their own experiences and provide suggestions. For example, a portal might see a question such as “What is the deadline to drop this course?” and receive a straightforward answer from a faculty member. But in a digital community, a student may ask “Is this course difficult for non-science majors?” and receive multiple varied answers from peers who have taken the course previously.
- **CONNECT WITH EXTERNAL PARTNERS** - Your campus likely benefits from the support of external partners—alumni, study abroad partners, and career recruiters. In fact, students often find great value from communicating with these groups, but don't get as much contact with them as they might like. There might be the occasional information session or mock-interview, but in general all of these external groups are kept somewhat apart. With a digital community, students can have direct contact and get timely support from these external partners. For example, a student can connect with an alumna who works at a company to which they are applying for an internship and ask questions that they might feel uncomfortable asking of their interviewer. This exchange does not have to be arranged through an intermediary, which means less time wasted, less appointments scheduled, and more time spent in helpful conversation.

Resource Libraries and Knowledge

We talked about how groups can house resources, but this is certainly not the only way that knowledge can be exposed in a community. You can also build an entire knowledge base and make it easily accessible and searchable in your community. A knowledge base consists of articles covering any useful information—such as the process for registering for classes, or securing on-campus housing. Anyone can contribute, including staff, faculty, those external partners we talked about, and even students. You can organize your articles with Topics—hashtags that group your articles according to subject and make them easy to find. If the prospect of putting all of your institution's processes and information into article form seems

overwhelming, take a breath! You don't have to do it all at once—start with what's most important and build it out from there.

Here are some questions to consider as you start planning your knowledge base:

- What are some of the most commonly asked student questions **right now**?
***Hint:** These will be the first articles you create.*
- For each of the questions you've identified, who is a subject-matter expert best equipped to address this topic?
- Will you allow students and external partners to write articles? ***Hint:** If yes, you can use an approval process to ensure the article is accurate and appropriate.*
- If so, what would the approval process chain look like?
- Can you consolidate your articles into topics? (such as Registration, Career, Financial Aid, Health Services)
- If so, what would the approval process chain look like?
- Can you consolidate your articles into topics? (such as Registration, Career Counseling, Financial Aid, Health Services)
- Will you have topics for internal/staff-only articles? (such as Expense Reports, Benefits, Professional Development)
- How often will articles need to be refreshed/reviewed?
- Who will be responsible for refreshing and reviewing?
- How can students, faculty, and staff suggest article ideas or topics?
- How will students, faculty, and staff be able to flag errors? (Such as a general email address dedicated specifically for this purpose, or a group in the community)

Identify Five (or more!) Commonly Asked Questions

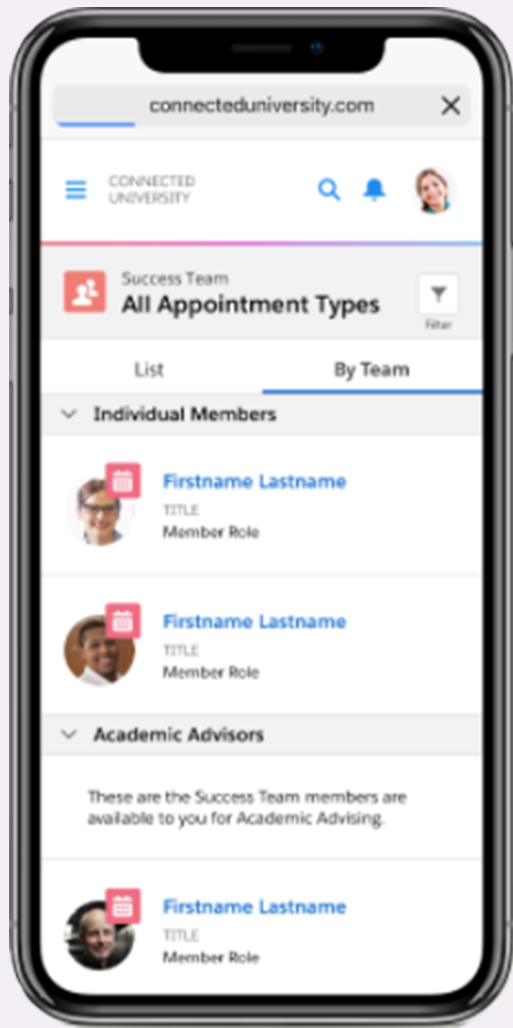
List common questions that could become articles as well as the subject matter experts that would be responsible for answering them. **Bonus:** What topic would they fall under?

QUESTIONS	SUBJECT MATTER EXPERT	TOPIC
Ex: What is covered under my student health plan?	Health Services Counselor	Health Services

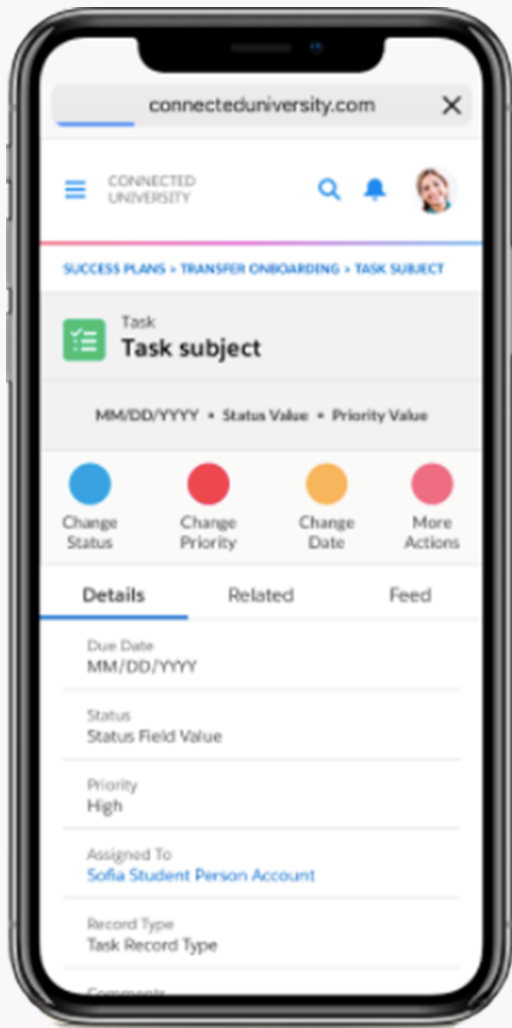
Digital Experience Communities and Student Success Hub

Note that a community is a key component of Student Success Hub. While support staff have a personalized console where they can keep track of their cases, tasks, and appointments, the student-facing side of Student Success Hub lives on a digital experience page. This is where students will get notifications of upcoming due dates and deadlines, schedule appointments, and find out who they can reach out to for support.

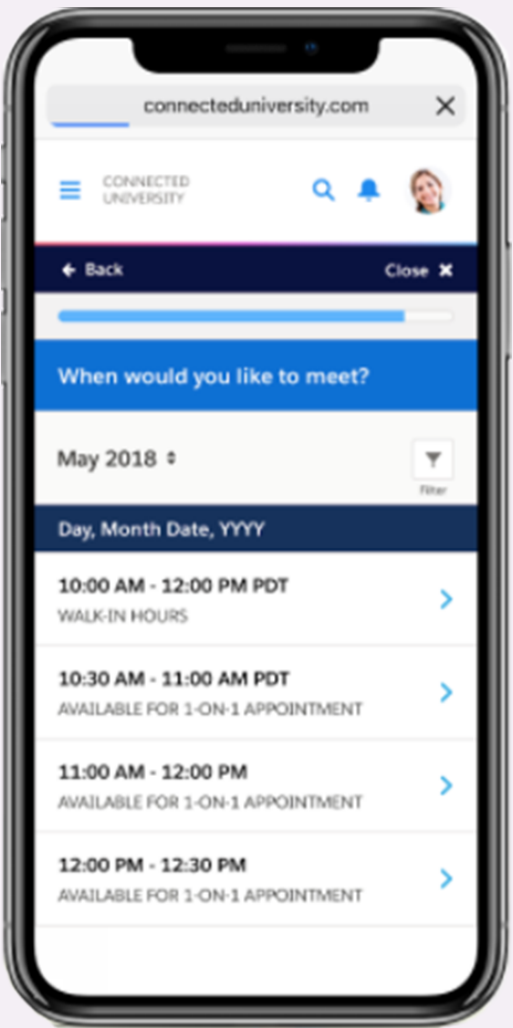
ACCESS TO
SUCCESS TEAM



FOLLOW-UP
MADE EASY



MEET STUDENTS
WHERE THEY ARE



Empower Faculty and Staff

A community isn't only for students—faculty and staff can find a lot of benefits there as well. Here are a few ways that an online community can alleviate some common pain points:

- **STANDARDIZE INFORMATION** - Many departments and business units operate in silos, which means that they may have different interpretations of common processes and may also be duplicating efforts. A community is a great way to standardize information and make it widely available. You may create staff and faculty-specific groups where you can share resources and updates, create knowledge articles that speak to the most common concerns, and create an open forum for feedback and questions.
- **DECREASE CASE VOLUME** - Creating a well-oiled self-service machine that addresses basic questions and concerns means that support and frontline staff can focus on more complex issues, which also means that case volume goes down.
- **ALLOW FOR PROACTIVE ACTION** - Having a pulse on student concerns through community discussions and article consumption means that staff can better anticipate advising and support needs. For example, if students are frequently asking questions around research grants applications even though a few articles on the topic exist, it may mean that new, more in-depth articles need to be created, or a workshop on preparing a strong application may be well-received. An added bonus is that you can always float ideas for events or resources in the digital community and track the response—that way there is never any wasted effort.

4 Steps to Building a Successful Community

Building and maintaining a digital student community is hard work! It takes time and effort, but the payoff is well worth it. Keep these four steps in mind as you get started:

- 1. Post Everything Important:** If you want students and staff to keep coming back to the community, it has to be THE place to go for information. Post all important times and dates, upcoming events, and interesting discussions in the community and make them prominently visible.
- 2. Be Consistent and Relevant:** Keep posting that important information, but also think about when you're posting it. For example, if it's the end of the semester and students are worried about exams, a post about planning next semester's classes will likely go unnoticed. Be mindful of what's going on and share only what's relevant at any given time.
- 3. Leave No Question Unanswered:** In order to make it clear that the community is where you want students to be, you'll need to prove to them that you are also there and that you're listening. If a question is posted, it should be answered in no more than 24 hours. Remember, you can get everyone in the community to pitch in, including other students, but make sure that you flag unanswered questions and get them resolved. ***Hint:** You can create a topic specifically for unanswered questions or use the question-to-case feature to push that question into the appropriate case queue for follow-up.*
- 4. Make it Fun:** A digital community can't be all work and no play, so build some fun into it! You can create groups that highlight hidden gems on campus, or ones that advertise free food. Consider also hosting contests and games, such as "Caption this Photo" or "100 Things to Do Before You Graduate." What better way to get students excited and involved than by offering them a chance to score some free food or swag?



Unlock Access to Careers

Career placement and security are always top of mind for students. Although career counseling is standard at most colleges and universities, the services offered are often limited, outdated, and often disconnected from the academic experience. To meet our students where they are, we need to rethink and upgrade our career offerings and the overall career counseling experience. Here's how we can make the change:

- **SUPPORT DIFFERENT LIFE PATHS** - No two students are alike, yet career services are often “one-size fits all.” When it comes to career paths, students often fall into one of two camps—the go-getters, who seek out every opportunity and check every box, and the inspiration-seekers, who are ready to explore options, seek out mentors, and take risks. Career teams that build programming to support both camps, and everything in between, will prepare their students for success in an ever-changing economy.
- **NOT JUST SERVICES, STRATEGY** - Career services are designed to get students an internship or a job, but career strategy is focused on supporting career exploration, skills development, and an aptitude for adaptability. What's more it's deeply embedded in the student's overall academic journey.
- **UNIFY EMPLOYERS AND CORPORATE OUTREACH** - Student opportunities rely heavily on the relationships that the college or university builds with business partners. These partnerships power campus recruiting, mentorship, and research opportunities. Yet the way that career or corporate relations offices interact with their business partners is often fractured—siloed communications, disjointed outreach efforts, and a lack of a coherent strategy.

Salesforce offers tools to support this holistic approach. Let's take a closer look.

Four Pillars for Success

To better understand the career counseling landscape of today’s institutions, we spent time with thought leaders in the industry. With their help, we’ve identified four distinct pillars for career counseling success:.

- Advising
- Education
- Tracking
- Events

Let’s take a closer look at each of these pillars and find out how Salesforce tools can help you achieve your goals.

Advising

We already saw how Student Success Hub can support students in their educational journey, but it can also be used in a career context.

SUCCESS TEAMS - One of the most common obstacles to students accessing resources is simply that they don’t know those resources exist. For example, a student may not reach out to a career counselor if they don’t know that they have a career counselor! Success Teams are specifically designed to address that problem—they are made up of support staff who are available to help students; this may include academic support staff, career counselors, or financial aid. You and your team can decide who is included in a student’s Success Team, and make this information readily available in a student’s digital community. From there, students can quickly and easily schedule appointments with the appropriate person.

APPOINTMENT SCHEDULING - We already covered how flexible the appointment scheduling functionality can be, but as we think about career counseling in particular, here are a few more considerations:

- Create career counseling-related topics and sub-topics (**Ex:** *Career Counseling: Interview Prep, Career Exploration: Skills-Finder Test*).
- Customize Appointment Preferences (**Ex:** *Resume must be submitted for review 2 business days prior to appointment.*)
- Build Pre or Post-Appointment Automations (**Ex:** *Send a primer on cover letters prior to an appointment, share a link to a TEDtalk on career discovery.*)

Education

One of the most important aspects of career readiness is ensuring students are fully prepared with the necessary skills and experiences. We want to encourage life-long learning and the ability to adapt as the job market changes—because we know that it always will. myTrailhead, a learning experience platform that allows you to leverage the power of Trailhead, was designed specifically to address this need. Here’s what you can do:

- **DESIGN CUSTOM LEARNING EXPERIENCES** - You’ll have access to 500+ pre-built, skill-based courses that you can then customize to student segments. For example, you may have a learning path for students interested in sciences and another for those interested in humanities.
- **BUILD GAMIFIED EXPERIENCES** - Gamification is a powerful motivational tool and Trailhead has it baked right in! Students can earn points, gather badges, and progress through the ranks as they skill up. You can even make specific badges a pre-requisite for certain appointment types or career opportunities.

- **TRIGGERED PROGRAMS** - Even the most exciting information can fall flat if it does not take timing into account. In order to help your students succeed, you'll want to offer them relevant, contextual information just when they need it. myTrailhead allows programs to be triggered with a specific action or at a specific time, so that it is always effective and relevant.

Tracking

As students work to find new opportunities and experiences, and employers extend offers, it's vital to keep track of that information. Here are just a few ways that you can track, report on, and communicate the success of your career development efforts:

CRM TOOLS FOR A COMPLETE VIEW - We already know how a 360 degree view of your students can help with supporting them academically, but the same concept applies to career counseling efforts. Knowing a student's interests, past experiences, and existing connections can supercharge career discovery. Bring data points together to:

- **Improved Support:** Even if two students are in the same academic program, they may not be looking for the same kinds of career opportunities. For example, having access to a student's meeting notes with academic support staff will provide additional context into their preferences, their interests, and their overall personality. Course enrollment history can uncover additional insights—for example, a pre-med student that has taken numerous courses in journalism may have interest in a scientific writing internship.
- **Identify Mentorship Opportunities:** One of the best ways to discover if a career path is right for you is to speak with someone already on that path. Creating connections between students and alumni based on shared interests is an excellent way to better engage a student that may be seeking inspiration. With extensive information at your fingertips, you can find alumni who

meet specific criteria, and easily reach out to them to forge a connection. Not only is this a great opportunity for your students, but it is also a wonderful way to build a close-knit community, even beyond graduation.

- **Build Personalized Apps:** Students are used to streamlined mobile experiences in their daily life, and career discovery is no exception. Salesforce allows you to quickly create beautiful, branded apps without having to write any code. Picture this: a student logs into your Career Strategy app, where they can look through available opportunities, submit their resume and cover letters for review, access career exploration tools, including skills tests and myTrailhead coursework, and even schedule an appointment with the next available career counselor. The experience is easy, quick, and provides everything the student needs within minutes—now that's the power of the platform at work!

KEEP EVERYONE APPRISED WITH EMAIL JOURNEYS - Letting your entire extended community know how students are succeeding in career development is important. Active and thriving career development offices can be a major draw for prospective students and a salient point for fundraising and alumni relations. Email journeys can help you create a cadence for communication, personalize it to the recipient and gather further information to provide additional insights. This is all accomplished through a marketing automation platform. Just a reminder: Salesforce has two marketing automation options that can support email journeys, Marketing Cloud and Pardot. If you are not currently using a marketing automation tool, you could also create similar experiences with email marketing tools, such as MailChimp or Constant Contact. You can compare and contrast these tools and more by checking out the [App Advice and Consumer Reports group in the Power of Us Hub](#). Sample nurture tracks may include:

- **State of Career Development:** Share general information about campus recruiting opportunities, highlight success stories of current students or recent graduates, and discuss the effectiveness of available career discovery tools.
- **Support Staff Resource Building:** Provide internal communications that keep support staff in the loop about upcoming and existing opportunities, connect majors and academic programs



with possible career paths and myTrailhead skills courses, and promote collaborative efforts among Success teams.

- **Alumni Connect:** Keep alumni apprised of mentorship and career counseling opportunities, highlight successful student programs or projects, and share your ever-growing network of career contacts and resources.

Events

The way that we think about and host events has changed drastically in recent months. As we shift to a more virtual presence, we have the opportunity to build an even more inclusive and personalized experience for our students and employers. Let's look at how the Salesforce platform and our extensible ecosystem can support virtual events.

HOST DIGITAL COMMUNITY EVENTS - Communities are a powerful way to bring people together. As you transition to virtual events, you may decide that you need a career-specific community, or you could simply build in a career component to your existing digital student community. We define the term event loosely—you can organize anything from a simple employer meet-and-greet to a full-scale career fair. Here are some ideas for community events:

- **Organize Live Q&A Sessions with Employers:** Make employers available to students even without on-campus visits. While formal connections between employers and students are highly valuable, it's important to remember that informal interactions can also go a long way. With a live Q&A, students can post questions without the pressure of an interview. What's more, the answers to those questions can reach a wider audience—anyone else in the digital community!
- **On-Campus Recruiting:** On-Campus Recruiting is often a very important focus for career teams—students work hard to prepare for these events and career support staff work hard to prepare them. Virtual recruiting events will still allow employers to screen, select, and interview applicants via online conferencing tools. What's more, if employers are part of your community, they can help students get ready by offering tips and tricks for resume building and interview prep.

As we shift to a more virtual presence, we have the opportunity to build an even more inclusive and personalized experience for our students and employers.

- **Career Fairs:** Offering the widest array of options, career fairs are an excellent way to expose students to ideas and experiences they may not have considered. Since a career fair is always a large undertaking, with many moving parts, it is likely that you will need to supplement your digital community platform with additional tools (more on that later!) that will help students and employers register and receive appropriate communications, while providing career teams with the necessary analytics tools. While it is certainly new terrain, there are benefits to a virtual career fair. For one, it can be attended in the comfort of the student's own residence, which means that there are no travel or lodging costs to consider. Additionally, there is an opportunity to build in live support—a quick chat with a career counselor before going in to an interview, or easy access to your career knowledge base to find some good sample questions to ask of a potential employer.

USE THE WIDER SALESFORCE ECOSYSTEM - While Salesforce tools can support a great deal of innovation, it's always useful to remember that the platform is made extensible with a wide array of tools via the AppExchange. Here are just a few event tools that are optimized for Salesforce integration:

- [Blackthorn](#) can help you build event landing pages and registration forms, track attendance, and provide live or recorded video functionality.
- [Traction Gather](#) creates a hub to unify all of your event-related experiences—from live streaming to on-demand content. What's more, you'll have access to impactful user insights, including viewing and attendance history, social engagement, and information on your most viewed assets.

- [Fonteva](#) is an enterprise event tool, powered by Salesforce. With Fonteva, you can create full event websites, planning agendas, as well as track registration and attendance.
- [Cvent](#) is another powerful events platform—build flexible and attractive registration pages, track feedback and engagement, and collaborate across teams to put on the best event possible.
- [Linvio](#) allows you to manage events right in Salesforce. Linvio supports GotoWebinar, Zoom, and Google Hangouts meeting platforms and even has a mobile events app for use on the go.

Whatever your event needs, it is likely that there is a partner-built or native functionality that supports it!



Conclusion

Student experience is an ever-evolving landscape. As we continue to learn what students value most and how we can better support them, know that you have a variety of tools to help you grow and adapt. We have seen these tools work time and again for educational institutions of all types and sizes.

It's clear that today's students expect more from our institutions, but they are also willing to give more. They are eager to offer ideas and feedback, as long as you are willing to listen and incorporate them.

As you work through the suggestions and activities covered here, remember that this is an iterative process. Return to these activities every semester or with the start of each academic year and consider what you learned the year before.

WE CAN'T WAIT TO SEE WHAT YOU BUILD!

Additional Resources

[Education Data Architecture Basics](#) (Trail)

[Education Data Architecture Documentation](#)

[Get to Know Marketing Cloud](#) (Trail)

[Automate Marketing with Pardot Lightning App](#) (Trail)

[Expand Your Reach with Communities](#) (Trail)

[Salesforce Student Success Hub Documentation](#)

[Getting Started: Service Cloud: Digital Engagement](#) (Webinar)

[Getting Started: Service Cloud: Chat for Lightning](#) (Webinar)

[Getting Started: Service Cloud: Einstein Bots](#) (Webinar)

[How To: Service Cloud: Plan “Salesforce Knowledge” in Lightning](#) (Webinar)

[Get Started: Salesforce Fundamentals for Education](#)

[Student Experience Trail](#)

[Education Release Readiness](#) (Trailblazer Community Group)

[Get Started EDU Cloud Landing Page](#)