CRM FOR HIGHER EDUCATION

HOW TO PREPARE FOR THE MOVE FROM SOLUTION TO CAPABILITY

By Joanna Iturbe

Higher education institutions are increasingly embracing customer relationship management (CRM) technology to engage with constituents, from prospects to alumni. The move requires looking beyond point solutions and single-purpose applications to enterprise-capable platforms.

Previously used primarily for recruitment and admissions, CRM technology is now powering additional parts of the student journey, including advising, campus health and wellness, and other forms of student support. It also occupies a large presence in alumni and donor relations efforts.

Salesforce Education Cloud Accelerates Capabilities

Salesforce Education Cloud aims to address this evolution by providing a single CRM for higher education. In many ways, Salesforce's journey has mirrored the evolution of the student experience over the last decade. Advances in technology used by students outside the classroom have increased expectations for bespoke touchpoints that are richer, timelier, and more precise.

SUMMARY

- Customer relationship management (CRM) is increasingly used by colleges and universities to engage with key constituencies, including prospective and current students, faculty, staff, alumni, and donors.

- As higher education CRM use cases evolve, technology platforms are adapting to meet institutional needs.

- Salesforce Education Cloud provides institutions with access to foundational Salesforce technology allowing them to develop custom CRM applications for multiple lifecycle areas.

The new Education Cloud will provide institutions access to foundational Salesforce technology, enabling them to develop new solutions to better support broader use cases without adding specific managed packages like Admissions Connect (AC) and Student Success Hub (SSH).

This approach introduces a fundamental shift in how Salesforce serves higher education by moving from solution to capability to align CRM and digital transformation investments to the institution's strategic priorities.

Common Capability Framework

What It Is	Why It Matters
A solution denotes how a business unit executes and delivers a business outcome, e.g., lead generation.	Designing based on a solution can limit scalability due to an isolated view of component usage.
A capability denotes what a business unit does without regard to how it gets done, e.g., recruitment.	Designing based on capability ensures scalability is a foundational principle applied across the enterprise.

Understanding Key Technical Aspects of Education Cloud

The first release of Education Cloud includes built-in components that start bridging into other higher education lifecycle areas, such as student success, institutional research, Greek life, and student life. The new model provides a unique spectrum of "customer 360" capabilities which Salesforce will expand upon via customer and partner-built solutions. Important technical takeaways to note are that Education Cloud:

- Does not leverage the Salesforce Education Data Architecture (EDA).

- Leverages person accounts (like other Salesforce industry clouds) with use cases for future persona support.

- Relies on Omnistudio, which enables pixel-perfect user interfaces that seamlessly blend CRM and non-CRM data into a single interface.

- Introduces composable components which expand beyond traditional point solutions.

- Removes traditional EDA and managed-package complexity while increasing performance and scale potential through the "move to core."

- Introduces industry tools like activity timelines, interest tags, and care plans, which have seen success with large-scale customers in healthcare and financial services.

- Aligns education innovation to the three core Salesforce releases per year, helping to alleviate release management and technical debt issues.

In addition to the industry tools referenced above, the new Education Cloud also uses Business Rules Engine and Actionable Lists. Trailhead is a great place to build or refresh knowledge. For those in technical roles, the new entity relationship diagram (ERD) for Education Cloud and the specific ERD for recruitment and admissions and appointment scheduling offer important guidance.

Determining Your Education Cloud Journey

Salesforce's vision is to enable education institutions to maximize outcomes and experiences for the lifelong learners they serve.

If you are new to Salesforce or a current Salesforce customer who did not implement EDA, full or partial migration to Education Cloud will be required to benefit from the rich foundation it provides for higher education capabilities. If your institution is a Salesforce customer that implemented EDA, Admissions Connect, or Student Success Hub, your journey to Education Cloud will look different.

Adopting new features can be paced according to your institutional goals, allowing customization when and where you need it. Regardless of your customer type, there will be a learning curve for higher education institutions.

Putting Possible Into Practice

Helping students complete their degrees and enrich their lives is at the core of the higher education mission. Thoughtful, scalable CRM can help colleges and universities engage with students along their journey by enabling institutions to keep pace with students' needs today and tomorrow.

Connect with Huron's team of industry and digital experts to discuss how to drive more value from your CRM, including Salesforce Education Cloud. In addition to participating in the Education Cloud Design Partnership program, Huron has experience implementing Salesforce Clouds across industries that have gone through a similar evolution.

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