GET STARTED

SALESFORCE FOR

RECRUITMENT & ADMISSIONS

GET STARTED IN EDUCATION WORKBOOK SERIES 1

salesforce.org

Introduction

THE HIGHER EDUCATION LANDSCAPE IS CHANGING.

Recruitment and admissions professionals face changing demographics, increased competition and an ever-growing need for personalization at scale. Prospective students have choices. Just like any other kind of consumer, they are doing more research, comparing their options, and expecting a high level of service at every step of their search, application and onboarding journey.

These factors can be seen as challenges—they make it necessary to rethink the process and restock a recruiter's toolkit, but they can also be seen as opportunities. The recruiting and admissions process can now be more efficient, more agile, and more cohesive than it has ever been. How, you ask?

Salesforce has all the tools recruiting and admissions professionals need to succeed in this new landscape. In this workbook, we will cover every stage of the admissions funnel—from building awareness to onboarding newly accepted students—and 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.

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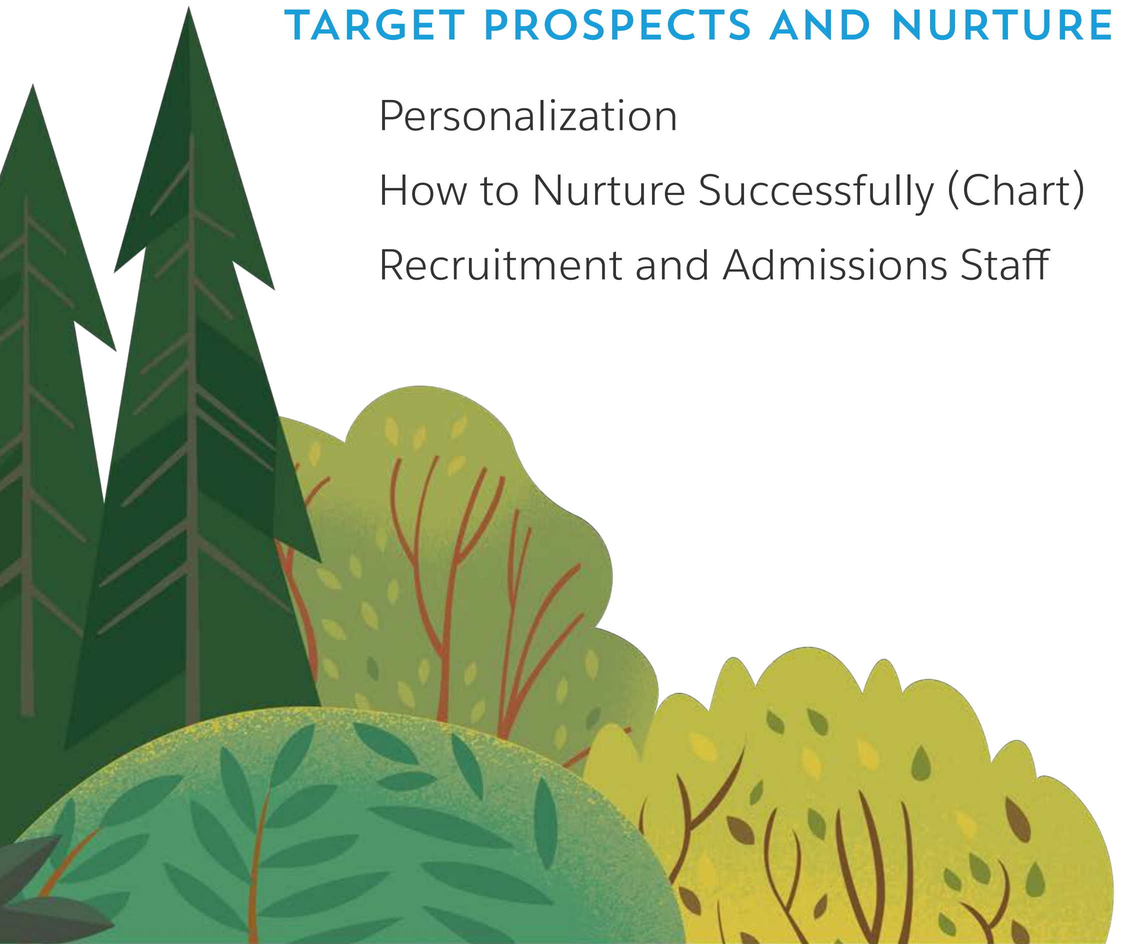

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Build or Buy

Before we go any further, let's discuss one of the most common questions that come up with a Salesforce implementation: build or buy? In this case, you've got options! You might start with a purpose-built Salesforce solution - like Admissions Connect - and then build and customize on top of standard functionality to meet your institution's unique requirements. You may also consider purchasing a pre-built recruitment and admissions solutions from AppExchange partners like Enrollment RX and TargetX.

There is no right answer to the build vs. buy question–it is entirely dependent on your unique use case; however, here are some benefits and questions to ask before you make your decision.

Questions to Ask:

1. Do you want a streamlined, out-of-the-box solution or something that you can customize extensively to fit your unique process? If so, how complex are these processes?
2. Do you have a tight "go live" deadline?
3. How important is it for you to have control over the governance of your solution?
4. Are other departments/colleges at your institution a consideration when choosing a solution? Is there already an existing solution (purchased or built)?
5. What is the level of Salesforce developer and admin support at the institution?

Read more about the Build vs Buy discussion here.

DID YOU KNOW?

You can create an end-to-end solution with Salesforce products! Here's what we recommend:

- Service Cloud
- Admissions Connect
- Experience Cloud
- Marketing Cloud or Pardot

Build or Buy?

BUILD CONSIDERATIONS

- You decide on future innovation and roadmaps
- More control over governance and administration
- Mix baseline and proprietary processes seamlessly
- Likely requires the use of a partner or in-house expertise
- Adds a layer of complexity to initial implementation and planning
- Long-term maintenance may be tricky depending on level of Salesforce experience

BUY CONSIDERATIONS

- Provides baseline set of embedded processes
- Independent Software Vendor (ISV) responsible for maintenance, support, and roadmap planning
- Reduces governance and administration demands
- Less control over the finished product
- Limited customization

Salesforce Solutions to Support the Recruitment and Admissions Funnel

The Salesforce ecosystem is extremely flexible and can fully accommodate the needs of a recruiting and admissions team. While your unique needs may vary, here are a few Salesforce solutions that are commonly used in the recruiting and admissions space. You might also want to browse the app exchange, where you'll find additional recruiting and admissions packages that extend Salesforce functionality.

Education Data Architecture

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

Why is it relevant to Recruitment & Admissions (R&A) - All education-specific products at Salesforce starts with this architecture. As we continue to innovate in the recruitment and admissions space, everything on our roadmap is tied to EDA. You will find that many independent solutions are also based in EDA, so whether you choose to build or buy, EDA remains a constant.

FEATURE HIGHLIGHTS

Application, Test, Test Score and **Education History** are custom objects are specifically designed with recruitment and admissions in mind. Whether you're working with a partner or building on your own, you can manage test score and application data, including application type and status and test score source information *(e.g. The College Board)*.

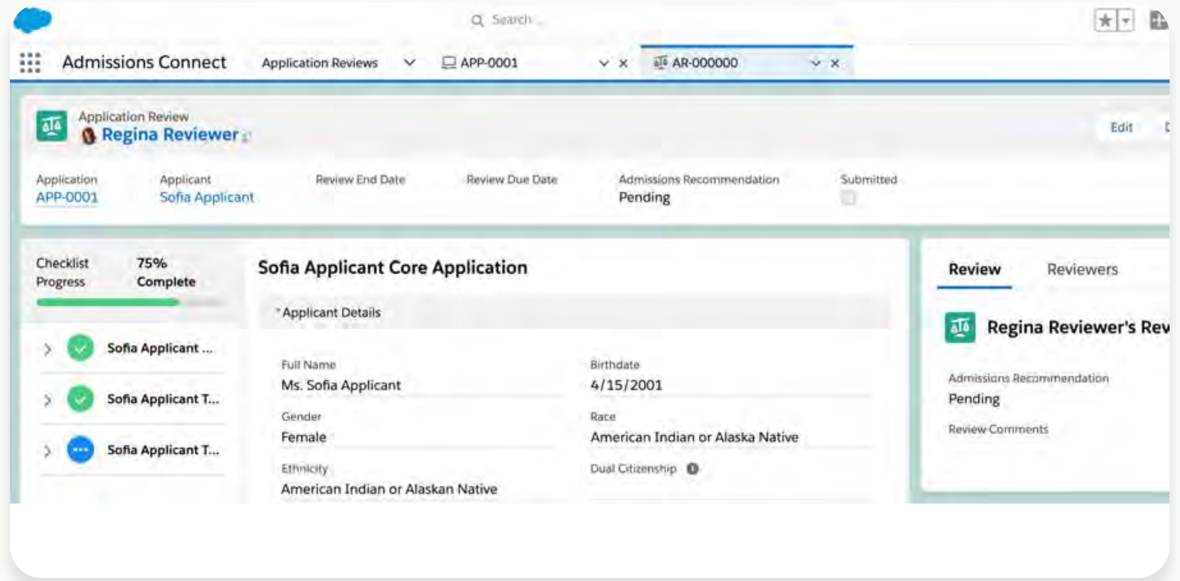
The **Affiliations** custom object allows recruiters to identify prospective students who are a good match for their institution by zeroing in on students who are affiliated with particular schools or extracurricular programs of interest. **Leads** are a standard Salesforce object that is particularly useful for recruiting teams. With leads you can collect useful demographic data like birth date, GPA, citizenship, area of interest and more for those *potential students* (you might call them prospects) who have signaled an interest in your institution. Leads are a great resource to help shape your recruitment strategies - and what's great is that leads can convert directly to contacts when they've been accepted to your institution.

Admissions Connect

What is it - Admissions Connect is a recruiting and admissions tool that streamlines application review, drives applicant engagement and facilitates collaboration across teams. Built on the EDA framework, Admissions Connect helps teams meaningfully engage applicants and effectively manage admissions processes.

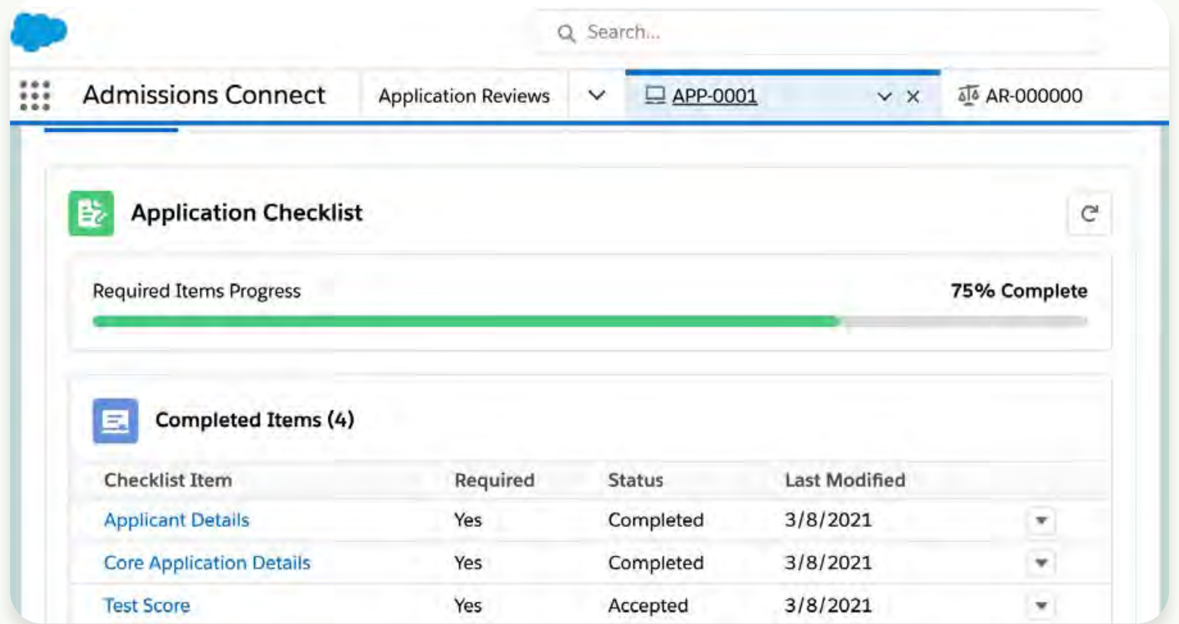
Why is it relevant to R&A - Admissions Connect is a product specifically built for Recruitment & Admissions teams.

FEATURE HIGHLIGHTS



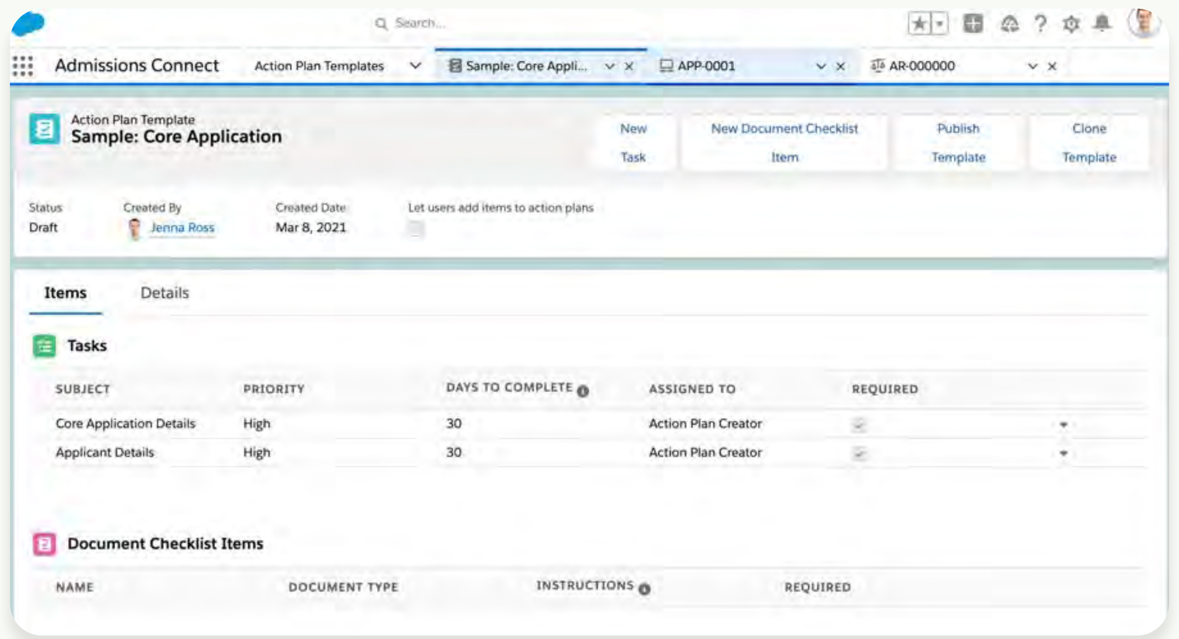
APPLICATION REVIEW

Records let you associate a single Application with multiple reviews.



DOCUMENT CHECKLIST ITEMS

Collect and display application documents, such as PDFs, images of transcripts, supplemental materials, IDs, or other items.



ACTION PLAN TEMPLATES

Define different requirements for different types of applications.

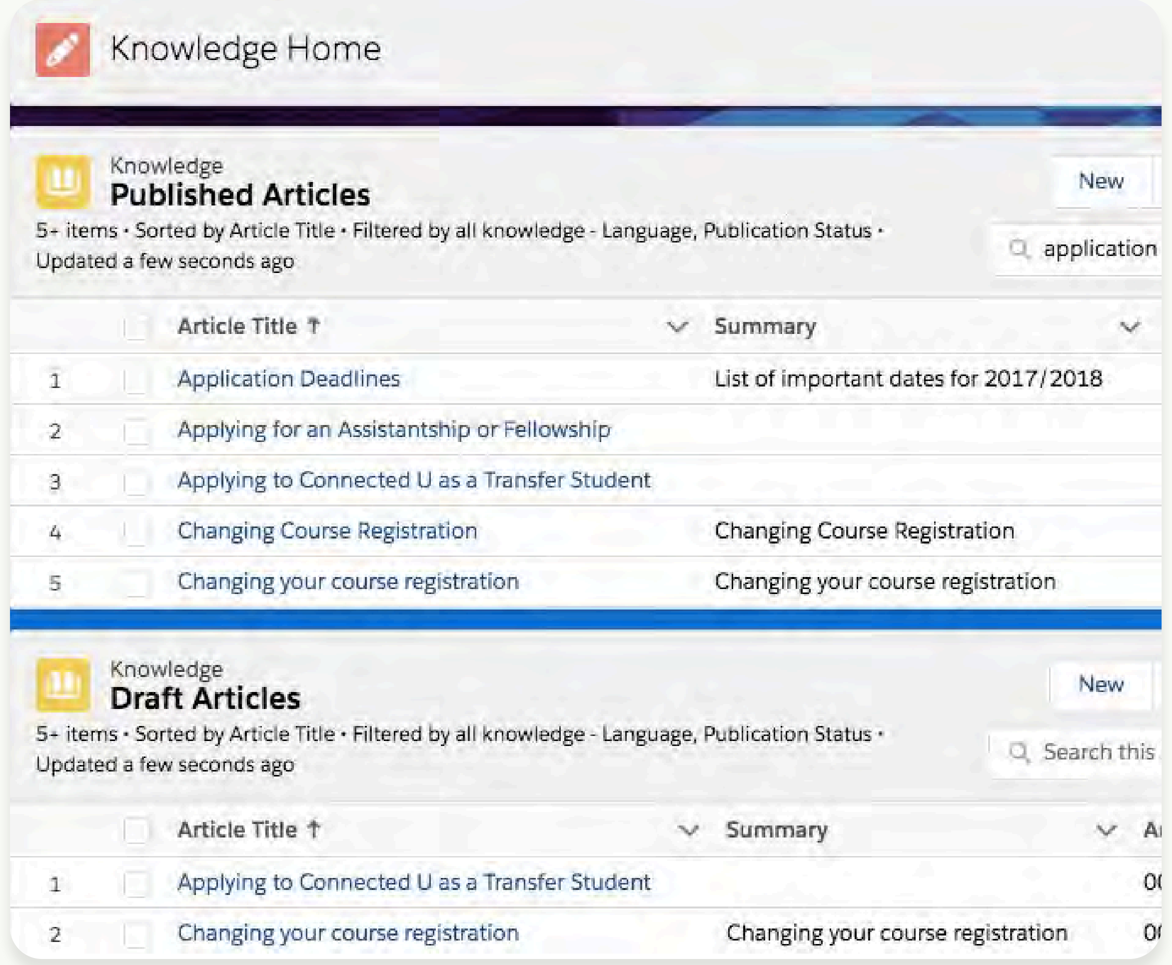
Service Cloud

What is it - Service cloud is a powerful tool for constituent 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 a prospective or admitted student, or their parent or guardian. Service Cloud also has tools that support self-service and enablement..

Why is it relevant to R&A - Recruitment and admissions processes align well with Service Cloud functionality. Service Cloud offers excellent options for tracking a prospect through their application process, then supporting them as they accept admission and onboard as a new student.

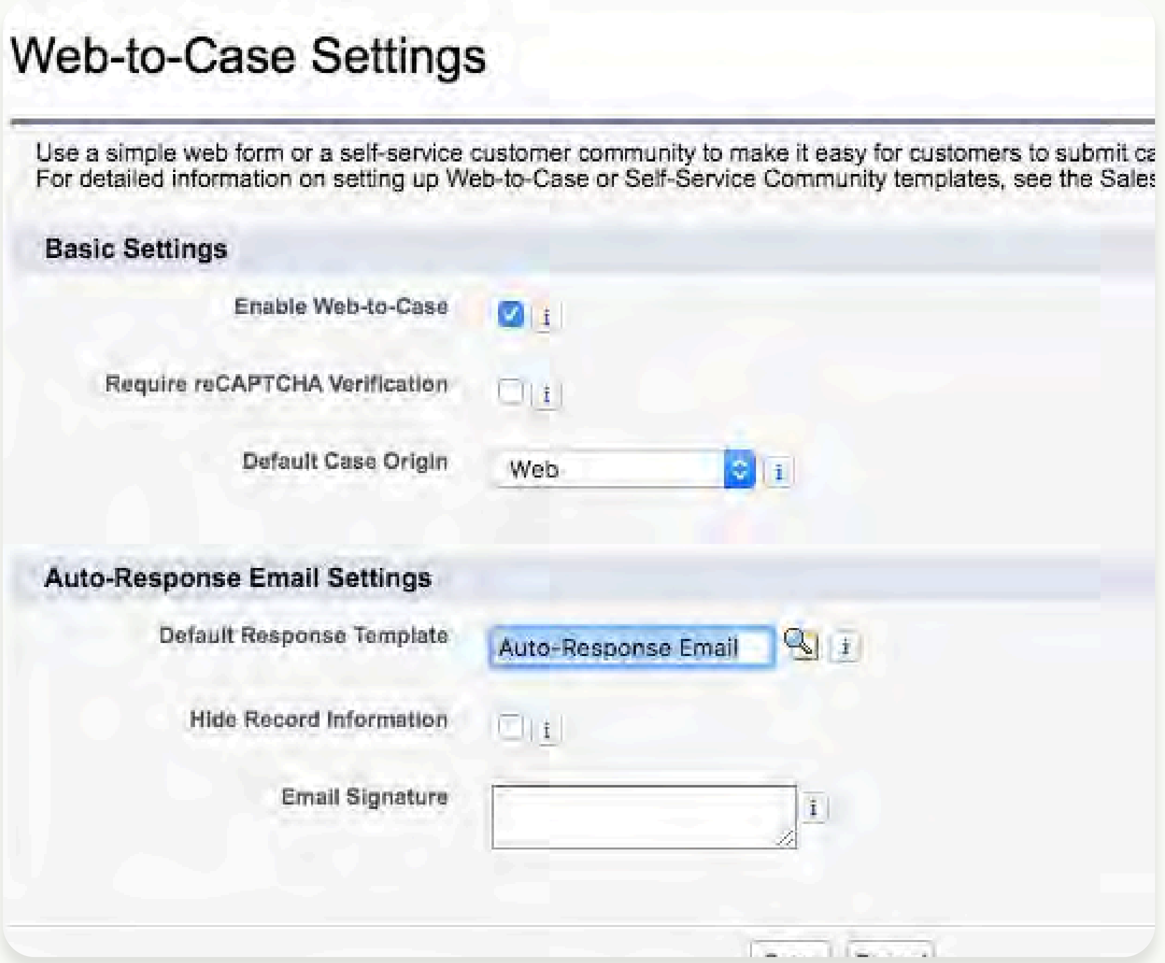
***Note:** Admissions Connect is built on and optimized for service cloud.*

FEATURE HIGHLIGHTS



KNOWLEDGE

Create a knowledge base of common questions and provide self-service resources.



WEB/EMAIL/TWEET-TO-CASE

Quick and easy case origination that makes sense to prospective students.

Marketing Automation

What is it - When we talk about marketing automation, we are talking about a suite of engagement tools that allows you to streamline and automate many marketing processes, including segmenting your audience, sending timely and relevant messages, and tracking the performance of your various marketing assets, such as emails, forms, or downloadable files.

Salesforce has two powerful marketing automation tools–Marketing Cloud and Pardot. Depending on the specific needs of your institution you might consider one or both of these tools.

Why is it relevant to R&A - Marketing automation is useful throughout the entire admissions process, but most heavily used at the top of the funnel. That's when you're building awareness of your institution and ensuring that prospective students get the information they need to make informed decisions. Through marketing automation, you can determine the criteria that matters most to you–for example, GPA or SAT scores, program interest, or region–then personalize your communications directly to your target audience. Furthermore, you can create journeys that promote or build interest in certain programs. Send scheduled emails over the course of a pre-set timeline, while dynamically adjusting to the prospective student's engagement and responses. For example, you may start with a general email linking to your most popular majors, then, based on which link a prospect clicked, tailor future emails to reflect their expressed interest in that major. You can also create forms to gather additional information from your prospects, build landing pages that allow you to promote webinars, events, or programs, and track engagement metrics.

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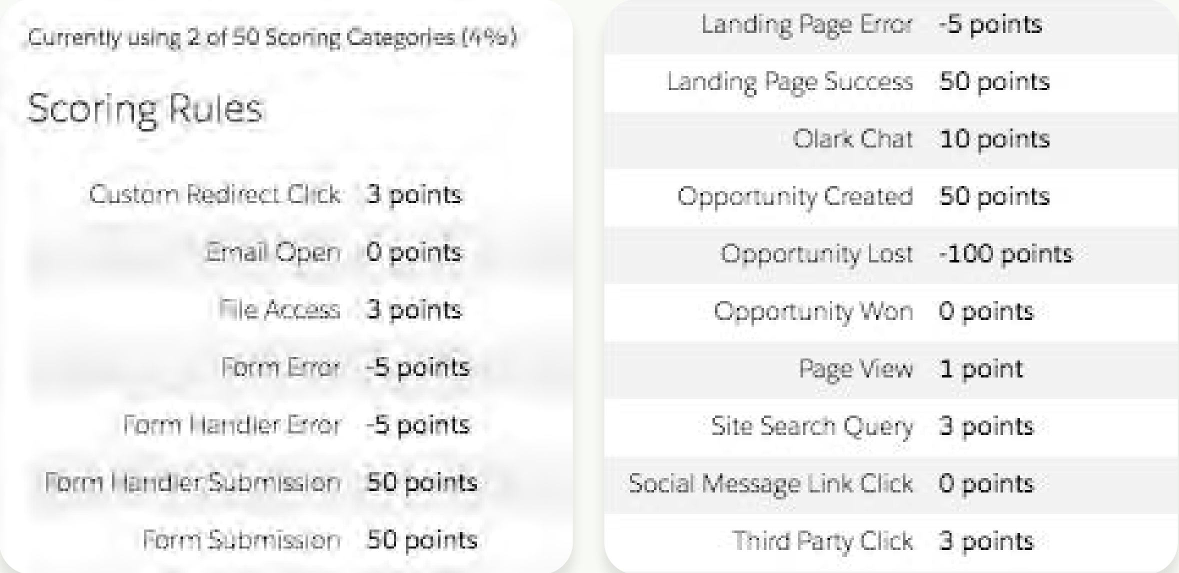
FEATURE HIGHLIGHTS

In Pardot

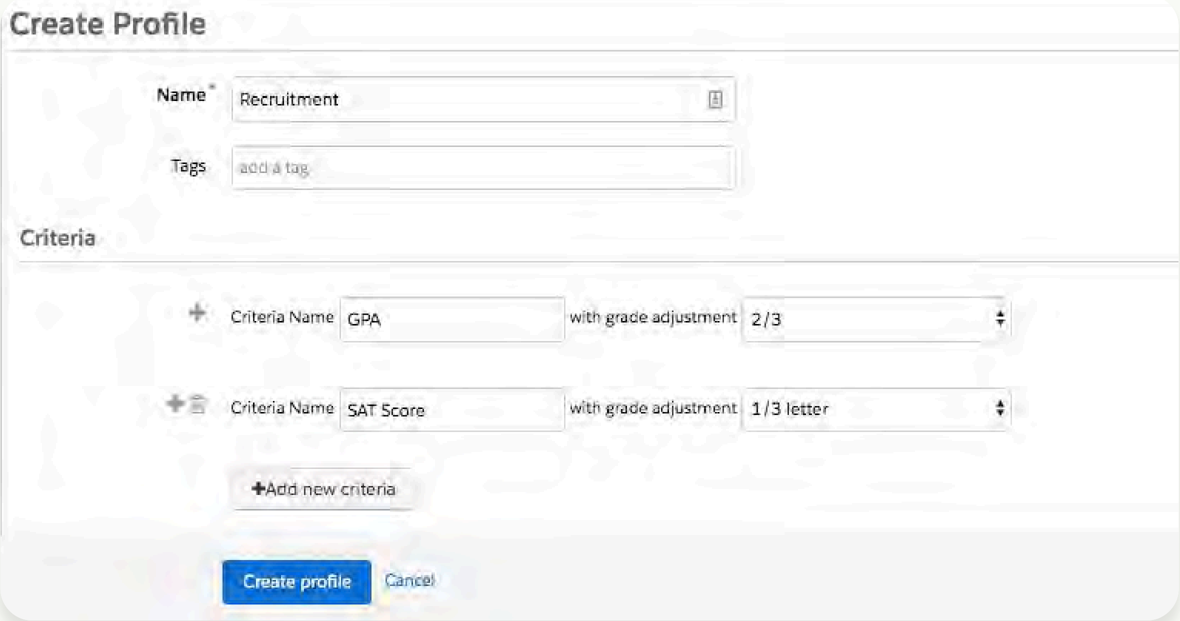
ENGAGEMENT STUDIO

Build nurture tracks of any length.



SCORING

Understand how interested a prospective student is in your institution through explicit engagement signals.



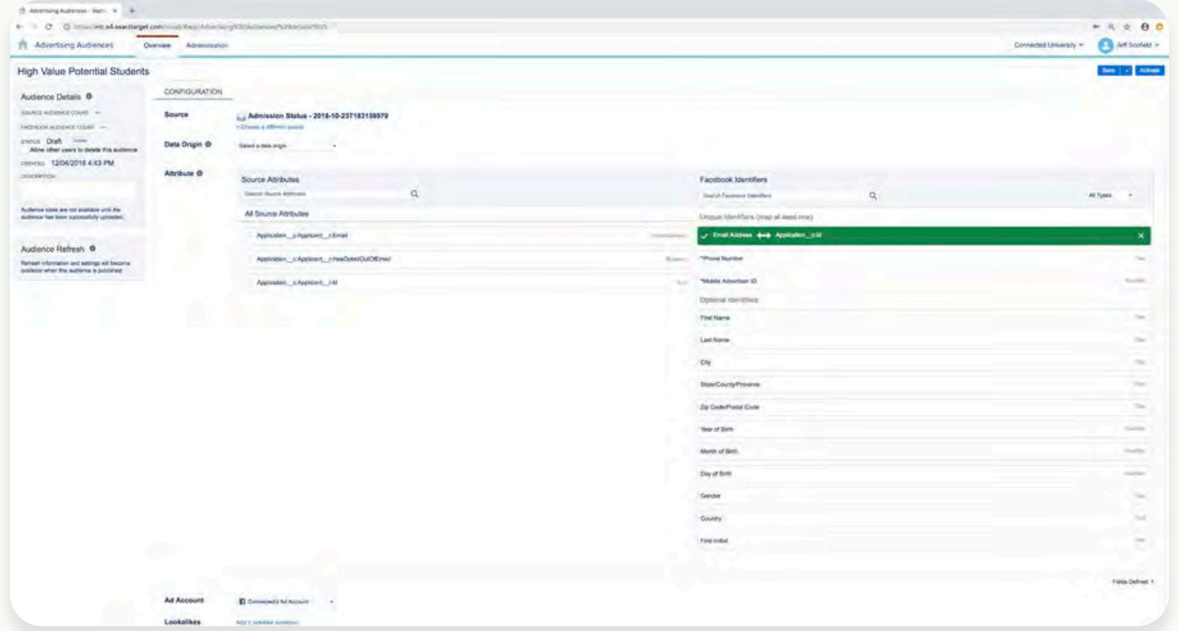
GRADING

Design your ideal prospective profile and then measure how any given prospect aligns to your needs.

In Marketing Cloud

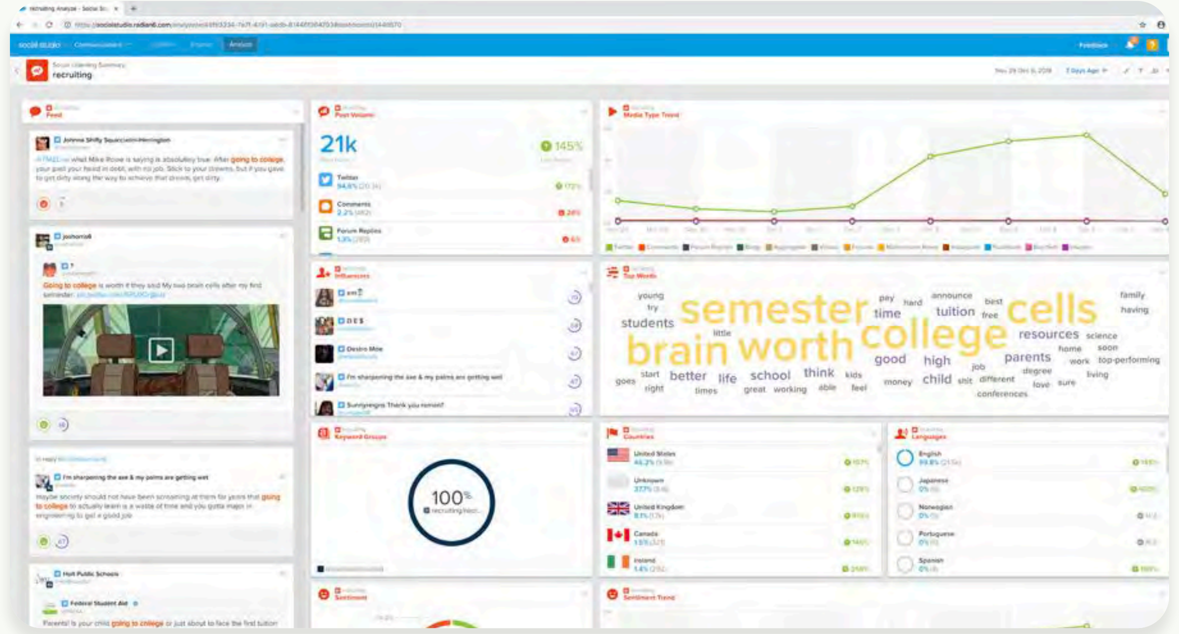
JOURNEY BUILDER

Build nurture tracks that go beyond emails, including SMS, social media, and ads.



LOOKALIKE AUDIENCES

Target prospective students that have yet to find you.



SOCIAL STUDIO

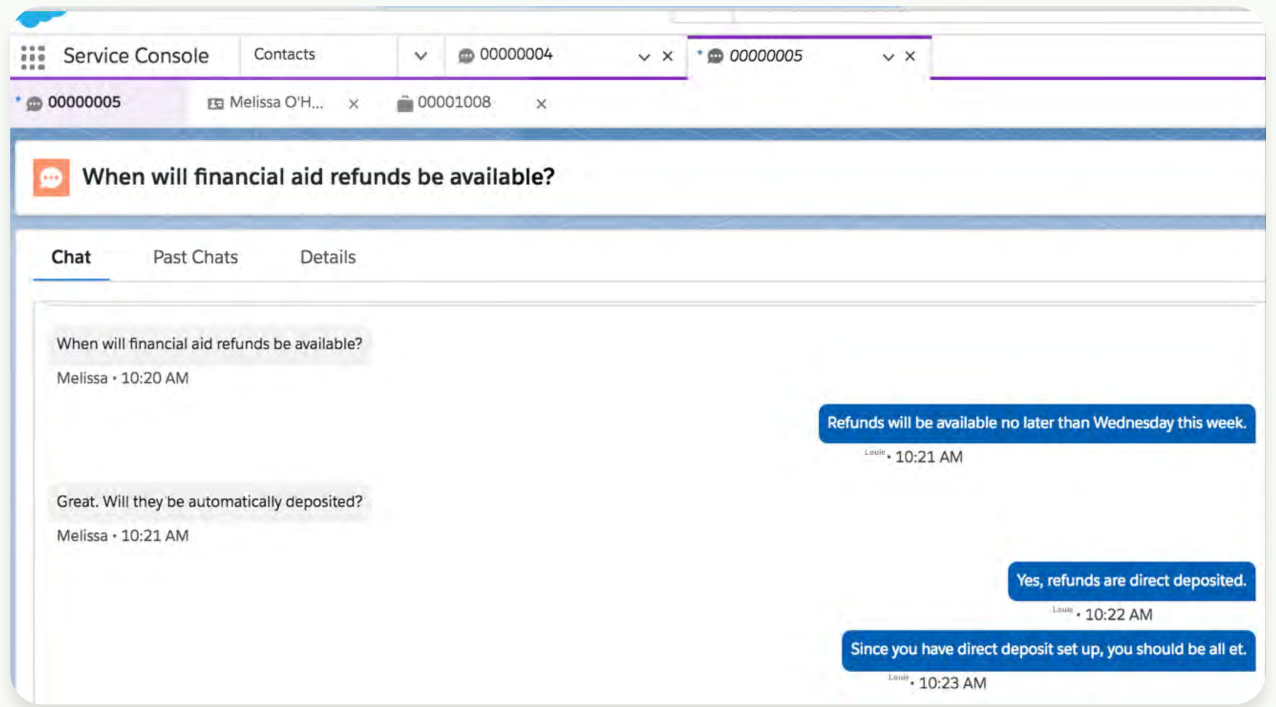
Analyze sentiment about your institution and gather important insights about your prospective students.

Experience Cloud

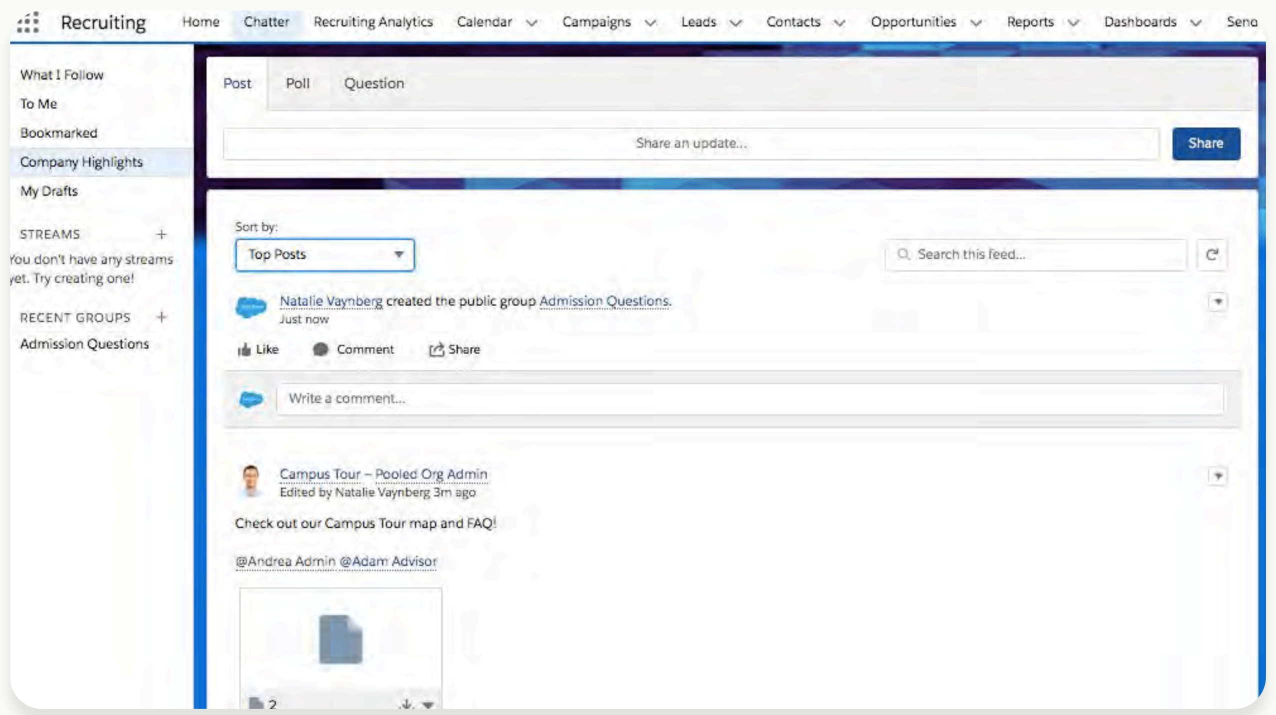
What is it - Experience Cloud sites, previously known as Communities, are branded virtual spaces for your staff and prospective or admitted students to connect. A step up from a traditional site, an Experience Cloud site is interactive, flexible, and can be quickly and easily built from a template or from scratch. Experience Cloud sites 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 prospect to quickly connect with a recruitment counselor, a variety of groups that prospective students can join to interact with their peers, and carefully curated topics that group articles and discussions into browsable categories.

Why is it relevant to R&A - The admissions process can sometimes feel overwhelming for students and their parents. A community can help alleviate the stress of “doing it alone” by connecting your prospective students with others who are going through the process, while also allowing them easy access to helpful information and resources. Furthermore, a community can greatly help with summer melt by engaging students at this vulnerable time, providing them with activities and guidance as they gear up for their educational journey with your institution.

FEATURE HIGHLIGHTS



CHAT and **EINSTEIN BOTS**
Communicating directly with your prospective students and addressing their questions in real-time.



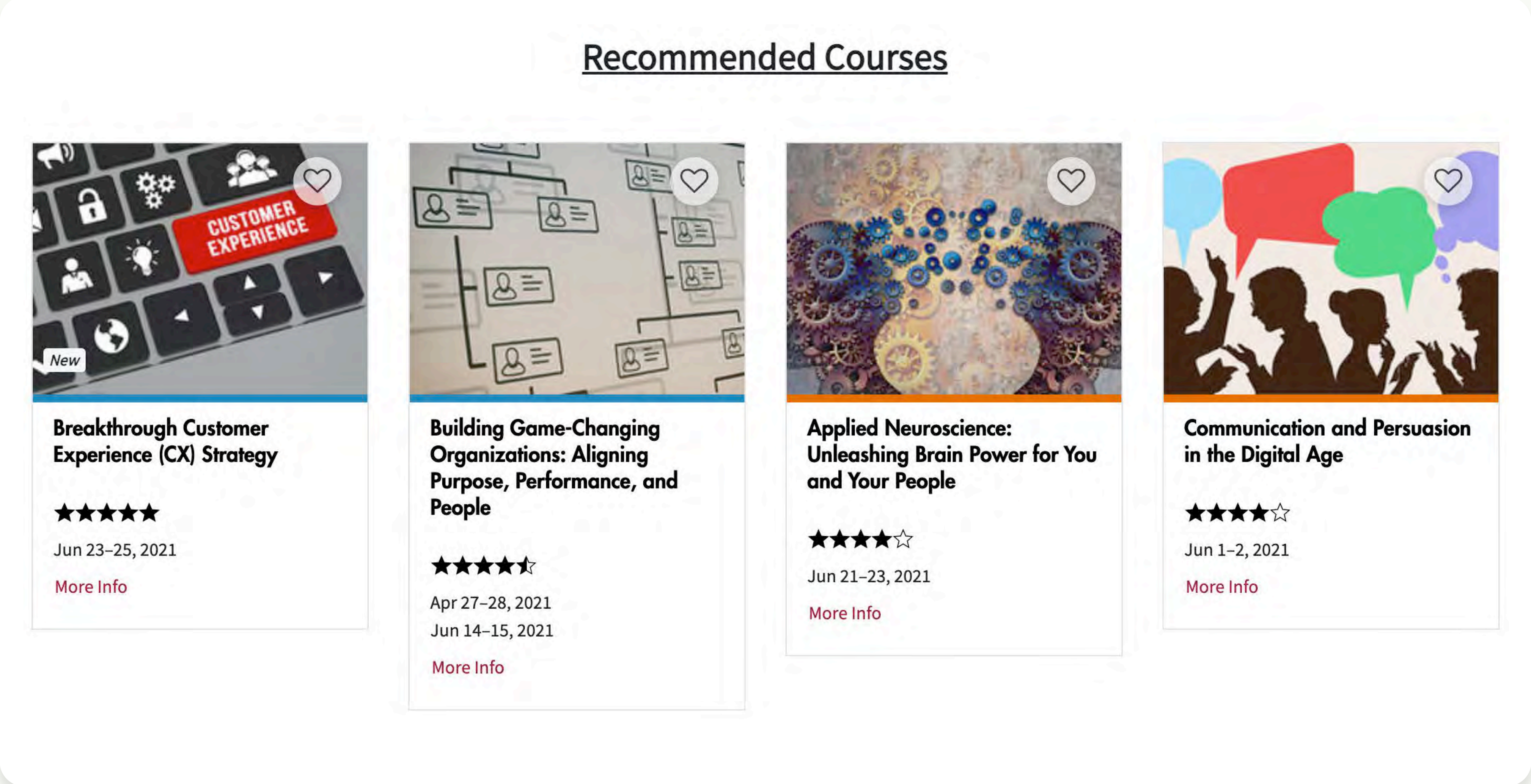
CHATTER
Ongoing collaboration, recognition badging, and an informational feed.

Commerce Cloud

What is it - Commerce Cloud for Education brings the same powerful buying experience behind trusted brands to schools and institutions. That means that schools and organizations purchase Commerce Cloud to provide the best ecommerce websites to their constituents. Commerce Cloud for Education aims to capitalize on revenue-generating programs - like Executive Education, Continuing Education and Certificate Programs - by simplifying the course selection process and capitalize on learner interest quickly.

Why is it relevant to R&A - Non-traditional programs are an excellent source of potential revenue for your institution. Prospective students are searching for a personalized, dynamic platform that can predict the next step in their learning journey. Commerce Cloud for Education simplifies the course selection process, guides prospects and learners to relevant, up-sell coursework, and ultimately allows them to choose what's best for themselves. On top of that, Commerce Cloud helps your institution make insightful decisions to inform strategic program development and growth, while also better supporting and nurturing more meaningful learner experiences.

FEATURE HIGHLIGHTS



COMPLETE THE SET

Stack courses together or make intelligent recommendations throughout the browsing experience.

COMMERCE SET

Thoughtfully respond to learner questions without having to wait on your available open hours or an email response.

SALESFORCE CONTENT MANAGEMENT SYSTEM

Integration to organize and manage instructors, materials, meeting locations and other important resources.

CERTIFICATE BUILDING

Allow learners to build their own custom certificate program that directly meets their needs.

Build Awareness and Generate Prospects

One of the most important parts of the recruiting process is figuring out your target audience and making sure that they are aware of your institution. You want students who align with the mission and values of your college or university and, more than that, who will further those values during their education and beyond. This can seem like a daunting process–how do you whittle away students who are not interested or those who are interested but are just not the right fit? Salesforce has a variety of tools to help you do this.

Gather Your Data

Before you can do anything else, gather as much relevant data as possible. The more information you have, the better equipped you are to target your communications, plan the right kinds of events, and generally build an outreach strategy that makes an impact.

Here's how Salesforce can help:

TRACKING CODE - Pardot places tracking code onto your website(s) in order to understand who is visiting your pages and what they are doing when they get there. Whenever a prospective student visits your website, they are cookied–which means that your site registered their visit and will remember them when they return. This can help you understand, at a high-level, which pages draw the most visitors. And this can be helpful - for example, it may help you decide which programs or majors you promote based on the number of page visits or visitors. However, tracking code is really only a first step in your data gathering process.

FORMS - You may know that your site has a visitor, but you don't know much else about them. In order to gather more information, you'll need to explicitly ask for it. You can do this through forms. You can use forms to "gate" certain information on your site in order to get some identifying information about your visitors–who may just be prospective students. For example, you may ask a visitor to fill in their name, email, and reason for visiting before allowing them to access your admissions brochure. In essence, you are trading a useful resource for a quick introduction. Pardot allows you to build forms through an easy-to-use wizard, but you can also use Salesforce Web-to-Lead tool to gather basic information and bring it into your CRM. While Marketing Cloud doesn't have native form functionality, you can customize your API to bring in form data or integrate with third-party tools.

LANDING PAGES - A landing page is a single webpage that exists with a particular purpose in mind. For example, you may build a landing page to promote an admissions event, or highlight a particularly interesting program at your institution. The reason why landing pages stand apart from your main website is that they are typically stripped down to the essentials–you won't find a lot of navigation or other "distractions" on a landing page, aside from those that directly relate to the event or program. Landing pages frequently also feature forms, gathering even more targeted information. If you build a landing page for an upcoming admissions information session, for example, you can assume that the person registering has more interest in your institution than someone simply browsing on your website. A higher level of interest means that you can ask them for more specific information, such as their program interest, or their GPA. You can build landing pages with both Pardot and Marketing Cloud.

> ***If you build a landing page for an upcoming admissions information session, for example, you can assume that the person registering has more interest in your institution than someone simply browsing on your website.***

WEBINARS OR IN PERSON EVENTS - While you can gather a lot of data through CRM tools, most recruiting and admissions professionals host at least some webinar or in-person events. You can gather data here as well! Tracking registration and attendance, and sending out post-event surveys can provide you with useful information that you can then use in your outreach targeting. Not only are you getting those basics–like name and contact information–you are also getting a signal that those who attend and participate in follow-ups have a strong interest in your institution and will likely welcome further communications. The AppExchange has integration apps for many commonly used webinar tools, such as GoToWebinar, and Pardot currently has built-in connectors with GoToWebinar and Webex. Additionally, Salesforce has an integration with SurveyMonkey and GetFeedback. There is also a native Salesforce survey tool that can be utilized for free with smaller audiences (less than 300).

Segmentation

Now that you have all that data, what do you do with it? This is where segmentation comes into play. When you segment you create groups of prospects or suspects based on specific criteria. Each segment will house prospects or suspects that share some element in common–their geographic location, demographic information, or interest in a specific major.

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 prospective students with Salesforce tools.

1. **MARKETING AUTOMATION TOOLS** - Both Pardot and Marketing Cloud 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. While Pardot can only segment off of explicitly known information stored on the prospect's record, Marketing Cloud can also use your existing segments to target "lookalike" audiences, or prospects that you may not yet have on your radar, but who match what you are looking for.

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, zeroing in on the criteria you are looking for, 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 for later use. You can utilize list views to add segments to relevant campaigns or assign them to specific admissions counselors for follow-up

Common Recruiting and Admissions Segments

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

- **PROSPECTIVE STUDENT DATA**
  - GPA
  - Location
  - Demographics
  - Term of Entry
- **PROSPECTIVE STUDENT TYPE**
  - First-Year
  - Transfer
  - Non-traditional
- **BY PROGRAM INTEREST**
- **BY MAJOR OR PLAN OF STUDY**
- **BY ENGAGEMENT LEVEL DATA**
  *(**Ex:** Email opens, clicks, event attendance)*

It's a good idea to start with larger segments, then continue to ideate and refine based on ongoing interactions with your prospects. For example, you may start with a specific location–New York–and then split up your New York prospects into first-year and transfer students, and eventually build out segments for various majors of interest. Note that you will have crossover amongst your segments, and that's perfectly normal.

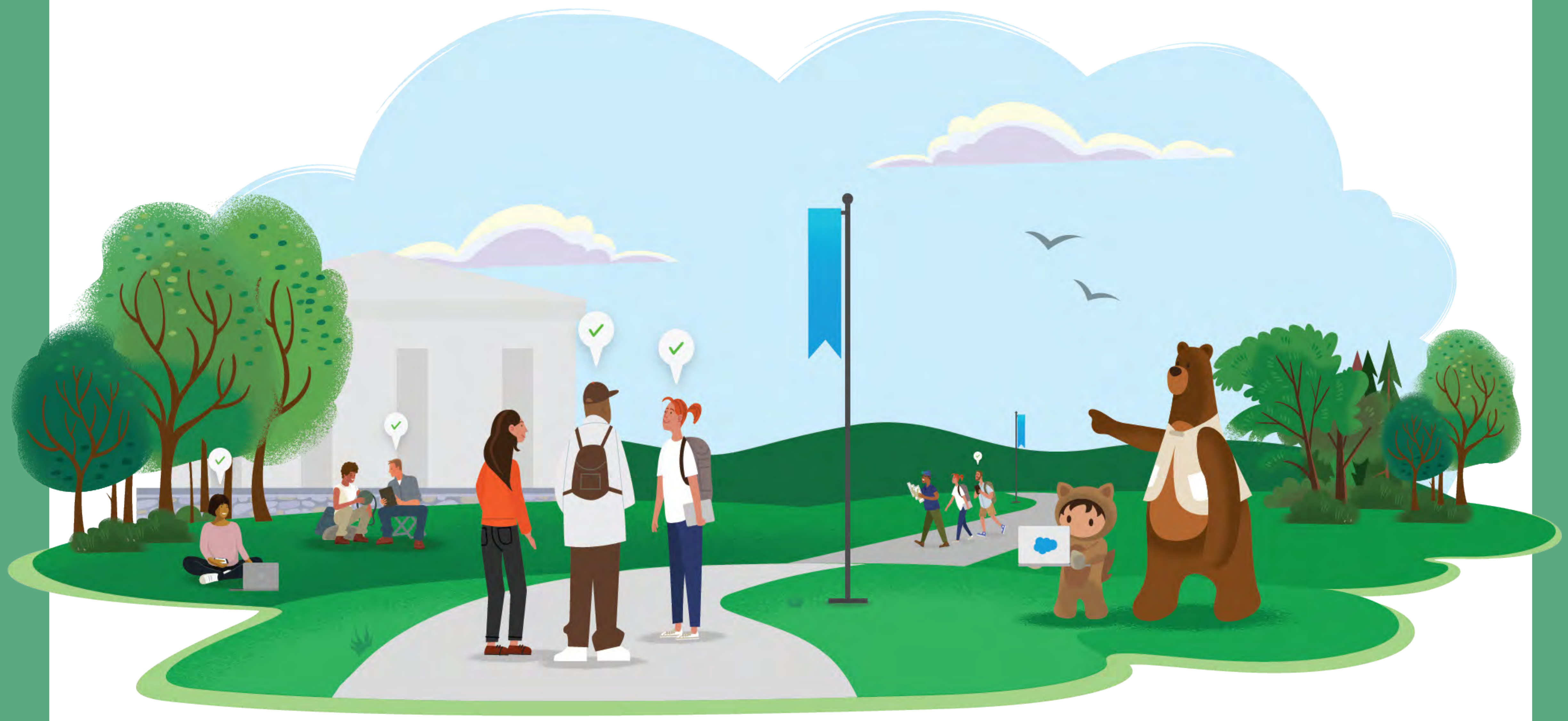
Although segmentation may seems like a daunting task, consider that if you do this important work first, you will then create a lasting infrastructure to use for years to come.

ACTIVITY

Segmentation Criteria

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

STUDENT TYPE	USE CASE
***Ex:** First-Year*	*Send emails with application requirements for first-years*
***Ex:** Transfer*	*Host transfer-specific information session*



Target Prospects and Nurture Applicants

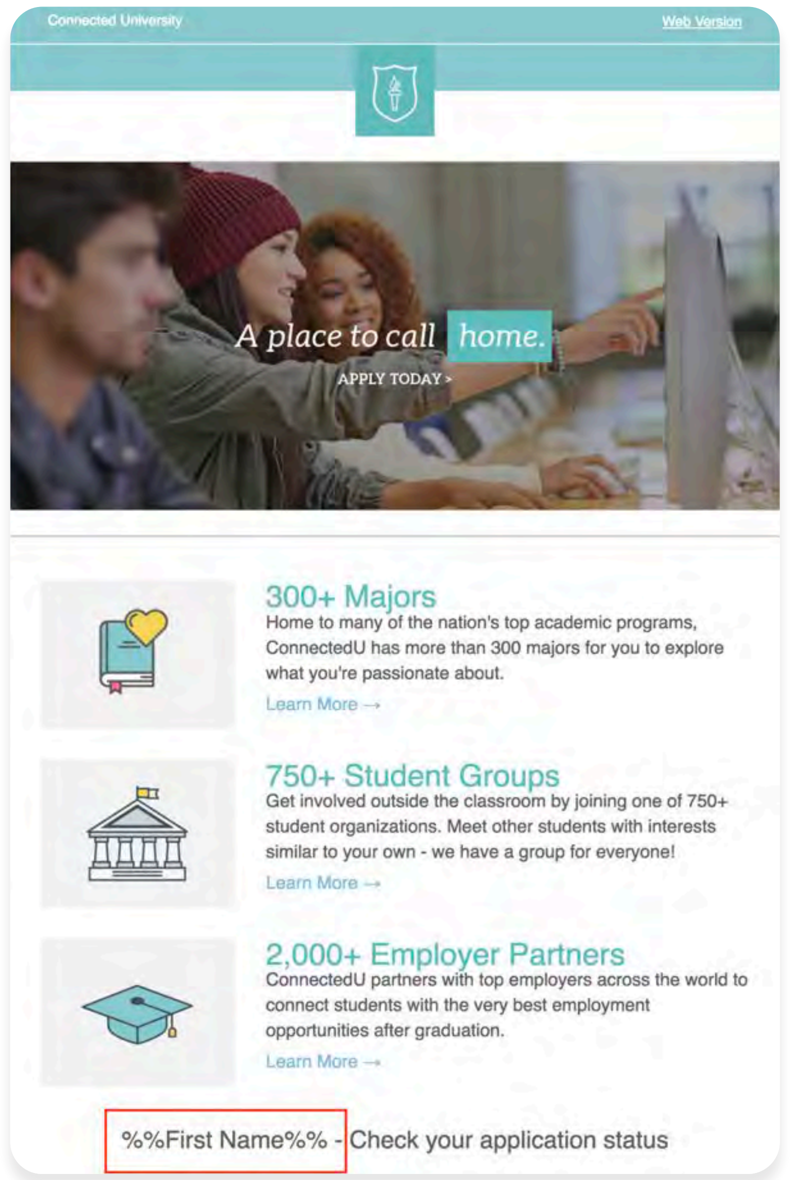
Personalization

You've done the hard work of identifying your prospects and segmenting them into groups for more effective outreach–all of that work can now be put into play with personalization. If you know your prospects, you can better tailor your communications to them, which in turn means that they are more likely to engage or show an interest in your institution.

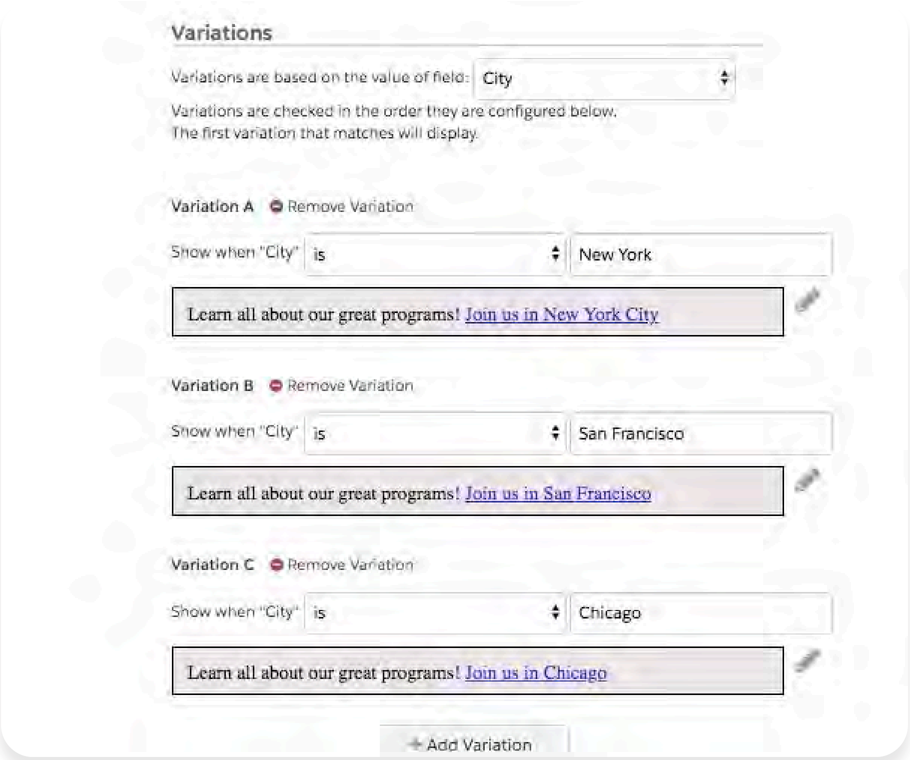
Today's students are savvy consumers. They do more research than ever before and, just like all other types of consumers, they want to feel heard and understood. They want to feel that you are speaking directly to them. Personalization is at the heart of meeting them where they are.

How Do You Personalize?

The Salesforce ecosystem has numerous tools that enable personalization. Here 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 prospective 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 site or explicitly indicated interest in a program or major. If a prospective student has engaged with an admissions counselor 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 prospects to see differing information based on a set criteria. For example, if you are hosting admissions events in five cities, you might create one content block–an email or a landing page–set the prospect student's city 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 city and you might also add a few additional touches, such as adding each city's unique skyline as a header image.

NURTURE TRACKS - Perhaps the most powerful personalization tool is an ongoing nurture track, or a "journey." As with the other two personalization tools, both Pardot and Marketing Cloud have their own version of a dynamic nurture 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. The most important aspect here is that you're not just endlessly sending information to your prospective students, you are also listening to them and incorporating that into your next step. For example, you may send an email with an informational admissions brochure to a list of prospects who have completed a form asking for it. After sending that email, you notice that a quarter of the prospective students on the list didn't click on the link to download the brochure. You might wait a few days, then send them another email, reminding them that the brochure is waiting to be downloaded. If they still do not take action, you might take that as a signal that they are no longer interested and remove them from that mailing list.

> ***But here's the really great thing—all of this is done automatically! You don't have to keep track of who is downloading the brochure and who isn't, your marketing automation tool can do that for you.***

On the other hand, the prospective students that did download the brochure may receive a different set of emails with additional information, they may receive a text message reminding them that there is an upcoming event in their city and if they register for it, you might send them a follow-up reminder. But here's the really great thing–all of this is done automatically! You don't have to keep track of who is downloading the brochure and who isn't, your marketing automation tool can do that for you. What's more, personalizing in this way means that if a prospective student has lost interest, they are not getting a slew of unwanted information for weeks or months to come. Instead of being lumped into one large group of people who filled out a form, you take their implicit feedback and taper off your communications.

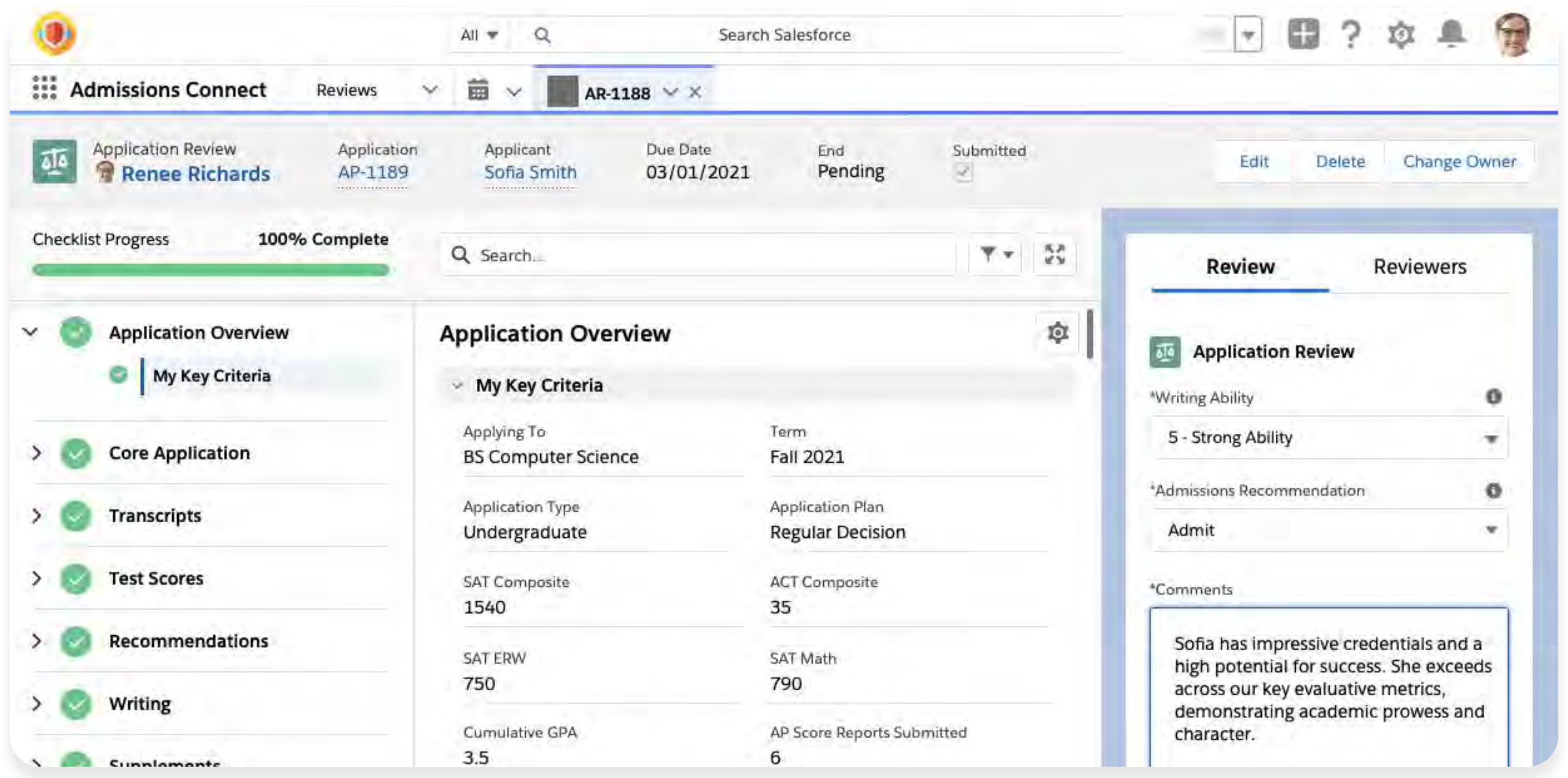
How to Nurture Successfully

Now that you know the basic functionality of nurturing your prospective students, let's talk about some **do's** and **don'ts**.

DO	DON'T
Create nurture programs for specific segments *(**Ex:** First-year students versus transfer students)*	Forget the "No" path–have an action plan for prospects that do not engage at all or engage some and then drop off
Build programs with a specific goal in mind *(**Ex:** Sign up for an admissions event)*	Use nurture track tools as just an automated email sending machine–they can do so much more!
Link programs where it makes sense *(**Ex:** You might have a program that's focused on getting a prospect to start an application and once they do, they can be added to another program that is focused on providing tips and tricks for submitting a strong application)*	Skip reviewing your results periodically–this will help you iterate the following admissions cycle
Plan ahead and map out your programs on paper before building them out in Pardot or Marketing Cloud	

Recruitment and Admissions Staff Success Kit

Most of what we've covered so far has been focused on providing an interactive and engaging experience for prospective students and applicants. While of course this is the goal of any recruiting and admissions office, we also don't want to forget the many tools that make internal processes run smoother. Let's cover a few features that might let your team work smarter.

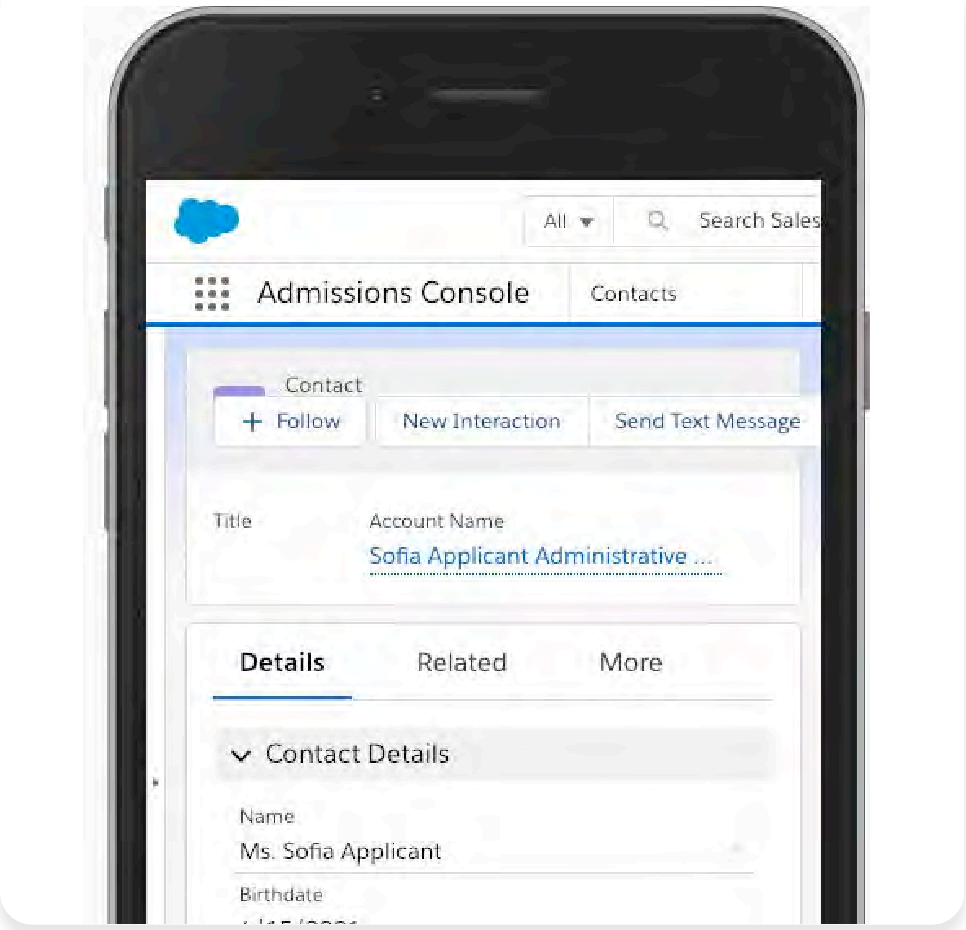


ADMISSIONS CONNECT - Admissions connect simplifies the application review process. You can say goodbye to disparate systems, siloed data and review processes plagued by inefficiencies. Here are some Admissions Connect that can help your staff.

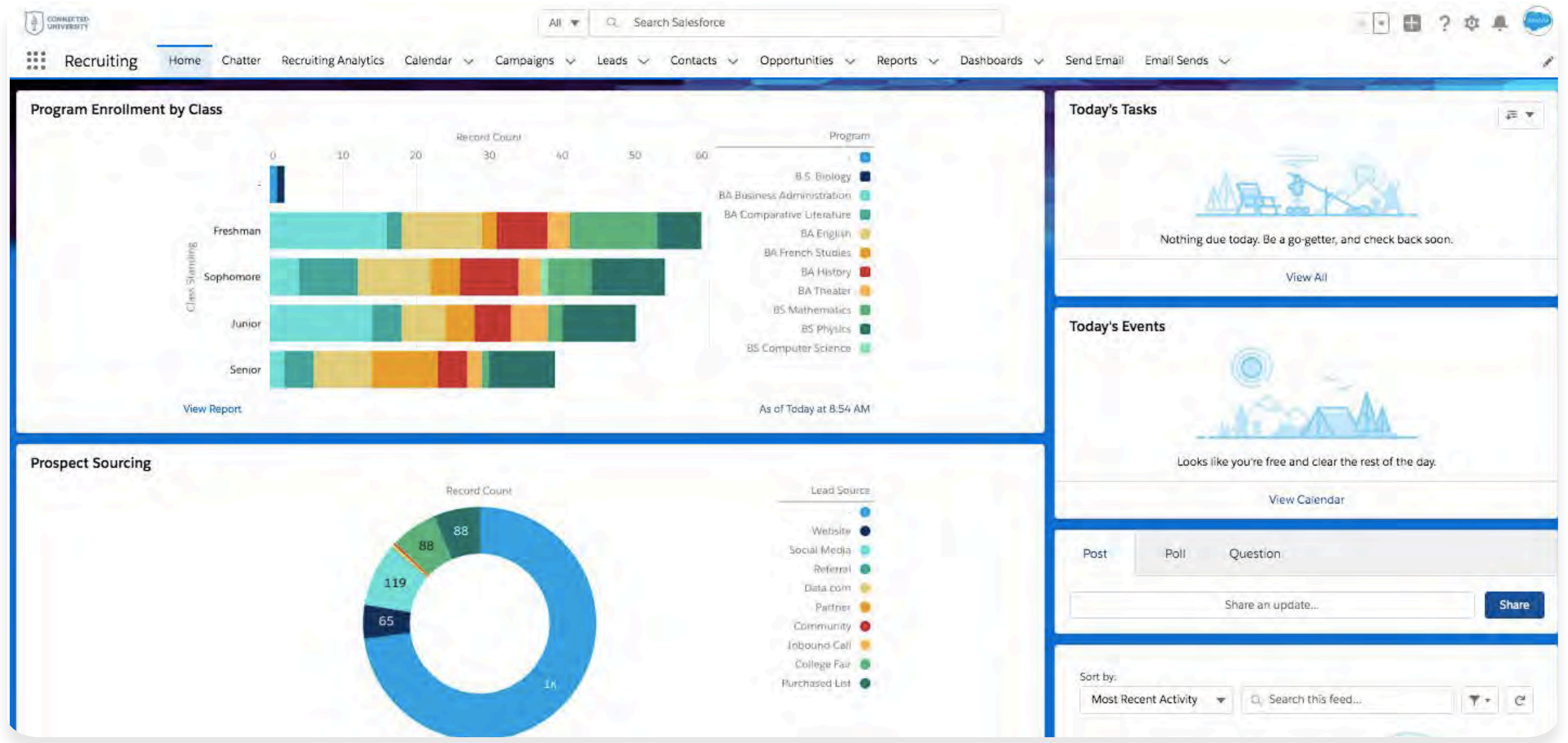
- Configurable application requirements that let you define what's needed for each degree program, concentration, or type of applicant
- Application checklists that show the overall completion of the application requirements, making it easy for your verifiers to quickly assess applications

- A single-page application reading experience for reviewers that shows materials in a single scrollable view
- An integrated admissions recommendation tool on the same page as the application, so reviewers don't have to go somewhere else to submit their recommendation
- The ability to assign multiple reviewers to a single application
- List views and reporting capabilities to help track the entire admissions funnel
- Portals to bring internal and external application reviewers together in one place, access reviews, ask questions and collaborate

ACTIVITY MANAGEMENT - You're handling a lot–making phone calls, hosting events, not to mention an endless to-do list that only ever seems to grow. The Activity component can make your life a whole lot easier by letting you see everything that you need to do and even remind you if you forget. The Activity component can be placed on any Lightning Experience page as a running timeline. You can keep track of tasks–like phone calls, emails or texts, or events–like upcoming meetings or information sessions. The Activity timeline is collapsible, so you can hide events that have already occurred and focus only on what's coming up, but you can also search for an important meeting or phone call that occurred a month or a year ago by simply opening up that month or year. Not only does the Activity component help you keep everything straight, but you can also report on your activities or, if you're a manager, your team's activities, to see where the majority of time is spent. This can be helpful in planning events for the following cycle or simply for benchmarking purposes.



SALESFORCE MOBILE - Recruiting and Admissions teams are often on the go and travel brings on some unique challenges and can leave road teams feeling disconnected from colleagues and missing out on feedback and collaboration. Salesforce Mobile seeks to address these problems by placing everything that you can do in Salesforce right on your phone. The Salesforce Mobile app allows you to update prospect records in real-time, so that you never forget a memorable interaction. You can also keep track of activities–see what you have coming up or check off tasks as they are completed - and also access information as you need it. Here's the benefit of Salesforce Mobile in action: let's say you're meeting with an applicant, open Salesforce Mobile, and notice they're missing an important piece of their application–here's your chance to give them a friendly reminder and capitalize on the opportunity to make this prospective student feel valued.



PERSONALIZED HOME PAGE - Because Salesforce is so vast, it can sometimes be difficult to quickly and easily access everything you need. A way to solve this problem is by working with your Salesforce admin to create a custom home page specifically for your admissions team. The home page is the first page you see when you log into Salesforce and it is completely customizable for each user. You can add components that make sense–like your Admissions Funnel dashboard or a list of today's tasks, and take away anything that doesn't. Easy access to pertinent information equals increased efficiency for your recruiters.

ACTIVITY #1

Build a Sample Nurture Program

IDENTIFY YOUR AUDIENCE

Ex: *Transfer Student*

OUTLINE INFORMATION YOU WANT TO SHARE

Ex: *Unique Requirements*

Ex: *Transfer Information Session Invite*

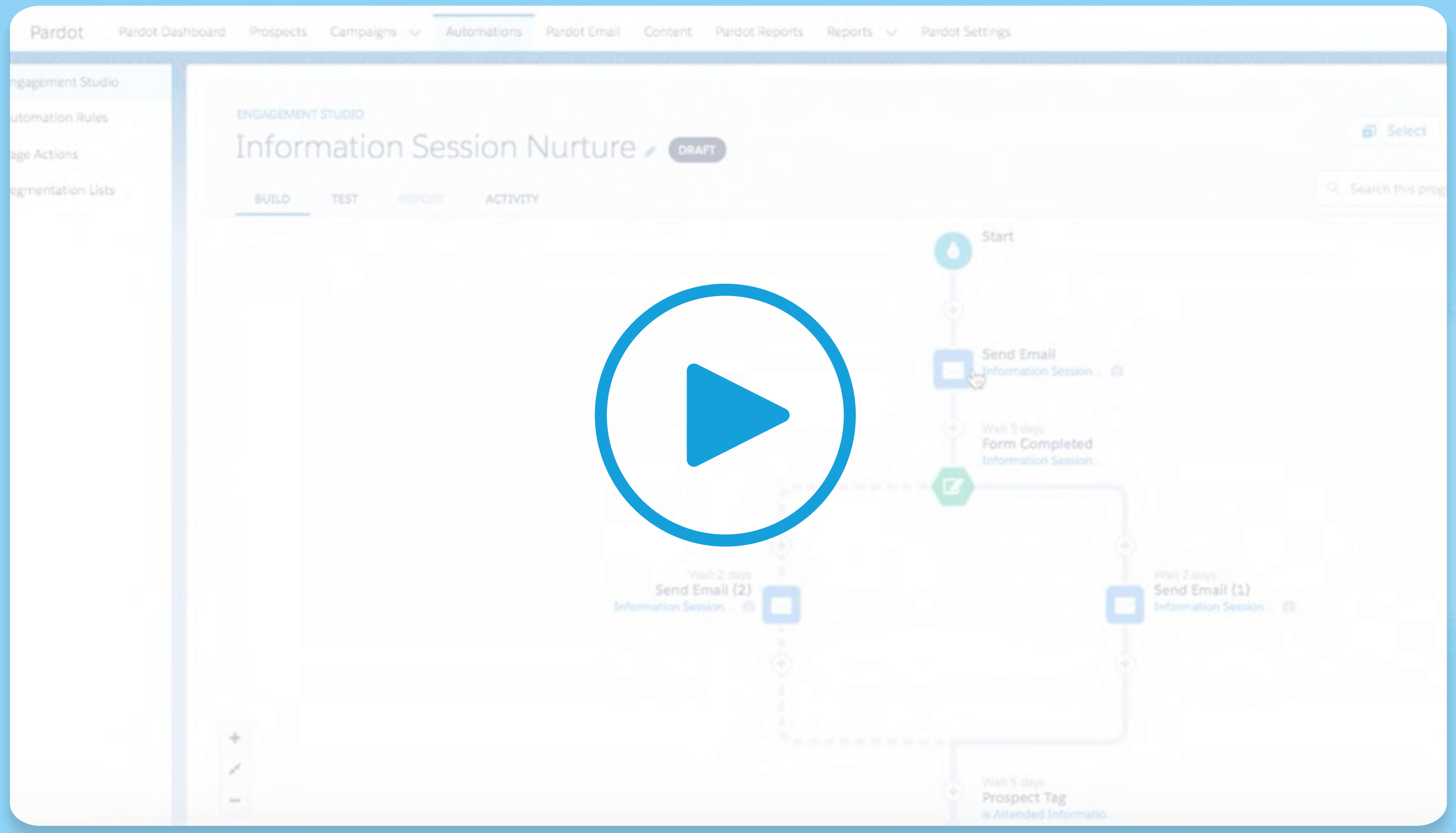
IDENTIFY DESIRED RESPONSE

Ex: *Download Requirements Pamphlet*

Ex: *Registration for Info Session*

VIDEO

Pardot Engagement Studio



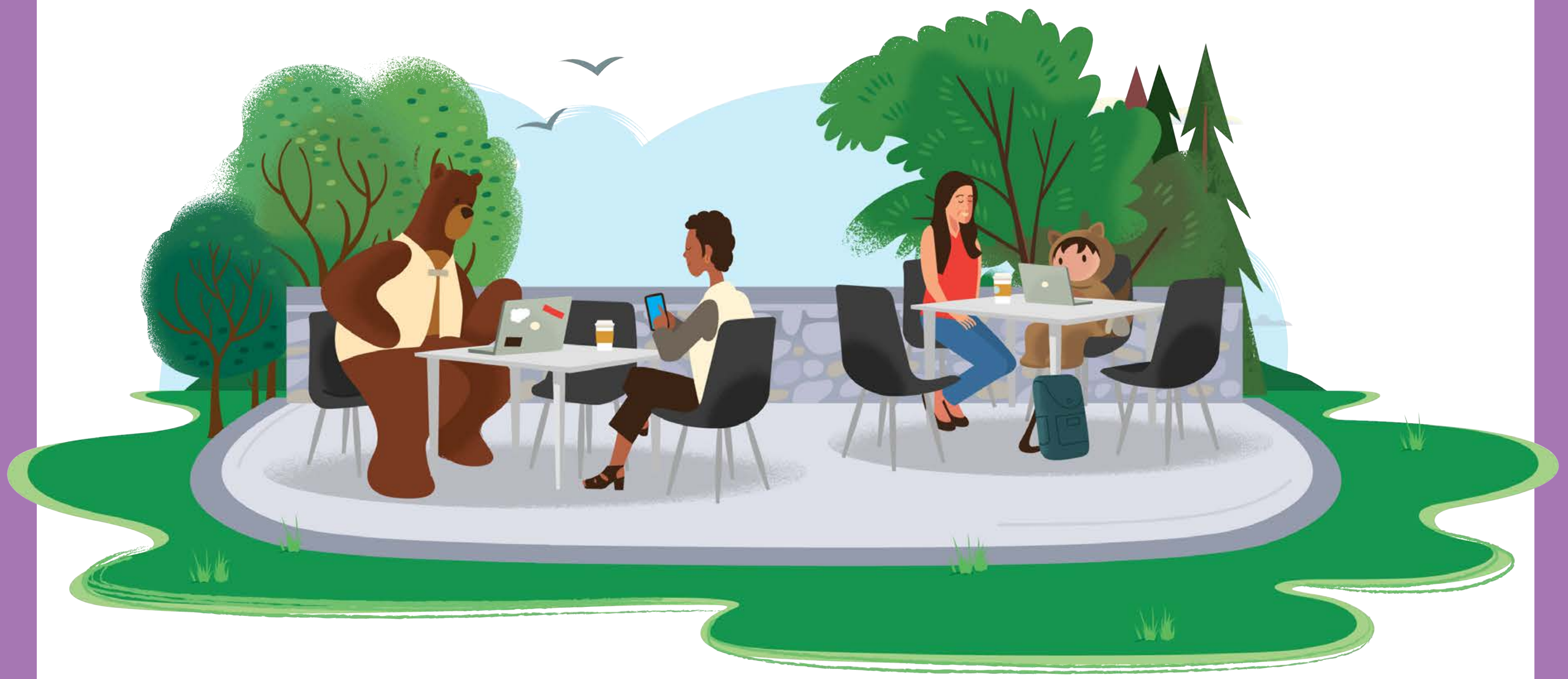
ACTIVITY #2

Identify Important Home Page Components

QUESTIONS	ANSWERS
What do your admissions users access every day?	***Ex:*** *Reports, Dashboards, Recruiting App Home Page*
What resources are available to support the staff's interactions with students?	***Ex:*** *Knowledge Base, Community*
Are there pain points in your current processes that you want to alleviate?	***Ex:*** *Summer melt*
What are the metrics that guide user training/preparation?	***Ex:*** *Prospect funnel, Yield numbers*

VIDEO

Designing a Lightning Home Page



Application Management

You've identified and nurtured your prospects, now it's time to think about your application experience and management. The application process can be stressful and hectic for applicants, but you can make it much smoother with just a few simple tweaks.

Simplify the Application Process with Admissions Connect

Completing an application for a college or a university can be a challenging and stressful process–there are deadlines to keep track of, documents to be collected, and even confusion around the required application requirements for a specific program. Admissions Connect can help you with these challenges, giving both admissions staff and applicants a standardized process that's actionable and efficient.

Action Plans

Before any application deadline is published, your admissions staff first need to decide what is required for any given application. For example, someone applying to your College of Arts & Sciences may need to include additional materials if the major they're interested in is Computer Science. With Action Plans you can specify those requirements and assign them to different application types. Not only is this an organized way for Admissions teams to track what they need to receive, but it simplifies and streamlines the process for the applicant.

Dynamic Application Checklists

Any lengthy process can feel overwhelming, and a college admissions application is no exception. Admissions Connect allows applicants a streamlined, step-by-step experience by providing dynamic checklists to keep track of what they've already submitted and what still needs to be completed.

Create an Immersive Applicant Experience with Portals

Applications that consist of static webpages are the traditional norm, however they leave a lot to be desired. If a applicant has a question, they might have to go searching through a multitude of pages or find a generic email address that may lead to a days-long wait for an answer. With Applicant Portals, Experience Cloud sites designed specifically to simplify the admissions process, you have the opportunity to change all that, making the application experience dynamic and interactive.

Authenticated Log-In

Having an authenticated log in for your community means that students can return over and over again and pick up right where they left off with their application. However, there is also an additional benefit to this–you can customize the community experience based on your applicant type. For example, you might have a different look and feel for an international applicant, or highlight different information and groups for a nontraditional student. That means that with only one community you can have a variety of experiences that make your applicants feel heard and understood.

Application Transparency, Visibility and Support

The application process can be clunky, especially when prospects submit their application and track their status in one place and get support in another. When considering that prospects apply to 5-8 schools at a time, it's easy to see how applicants can feel out of control. With Applicant Portals a prospect can submit an application through the Common App or on a school's website and then view all its contents in one place. They can see which pieces of their application are missing, view their application status and seek support all in one place.

Real-Time Support and Interaction

Let's look back to our example of a student looking for help with their application. They could search through those pages, send that email and wait for a reply, all the while getting more stressed out and confused, or they could log in to their applicant community and immediately find real-time support! Here are a few ways that communities can speed up support and make it more friendly:

1. **CHAT** - integrated chat capabilities allow admissions counselors to be on hand to answer questions within a short span of time.
2. **MASCOT, THE ADMISSIONS CONNECT CHATBOT** - pre-configure dialogs, entities and variables to answer the most common Recruitment and Admissions questions, provide an application status update and more.
3. **INTEGRATED FEED** - applicants can interact with each other and help answer questions organically by simply sharing what they know.
4. **KNOWLEDGE** - a knowledge base can empower students to find their own answers quickly and easily. Knowledge base articles can be written by any knowledgeable member of a community–even current students can help!
5. **GROUPS** - an applicant community allows applicants to self-organize into relevant groups. These can be academic in focus–such as a group for the applicant's desired major, or social–such as a group for applicants in the Northeast.

Note: *If you already have Experience Cloud licenses and have an active community page, you'll simply need to add the Applicant Application component to your page and adjust visibility on Application Material Mapping.*

Track the Application Process with Path

There are many steps in the application process and prospective students aren't the only ones that have to keep track of it all. Admissions counselors need to keep track of the various stages and the information required in each one. With that in mind, Salesforce Path is the perfect solution for tracking application progress for applicants.

Path guides your users along the steps of a pre-defined process. Once you build an enable a Path, you will be able to place the component onto your record pages so that every time you access a prospective student's record you can see exactly where they are in the process and what they still need to complete. Utilizing Path will:

- Allow you to design a custom application process by defining specific stages
- Provide a visual representation of your application process for easy tracking
- Allow you to specify key fields for each stage so that admissions counselors can ensure all necessary information is provided along the way
- Give you the opportunity to share guidance with users at every step *(**Ex:** When an application has been submitted, a confirmation email should be sent to the applicant to confirm receipt of their application materials)*
- Provide a fun way to celebrate when an applicant has been accepted–confetti!

Third-Party Applications

While Salesforce has a lot of great tools for application processing and management, there are also many third-party applications that integrate well with Salesforce products to help you go even further. These apps range from fully fleshed-out solutions to supporting "plug-ins" to existing functionality. Here are a few such applications that are commonly used for admissions:

E-SIGNATURE	DocuSign	nintex Drawloop
LOCATION & TERRITORY MAPPING	geopointe	MapAnything A Salesforce Company
DOCUMENTS	conga	springcm
RECRUITING EVENTS	Fonteva	cvent
FORMS	FormAssembly	formstack

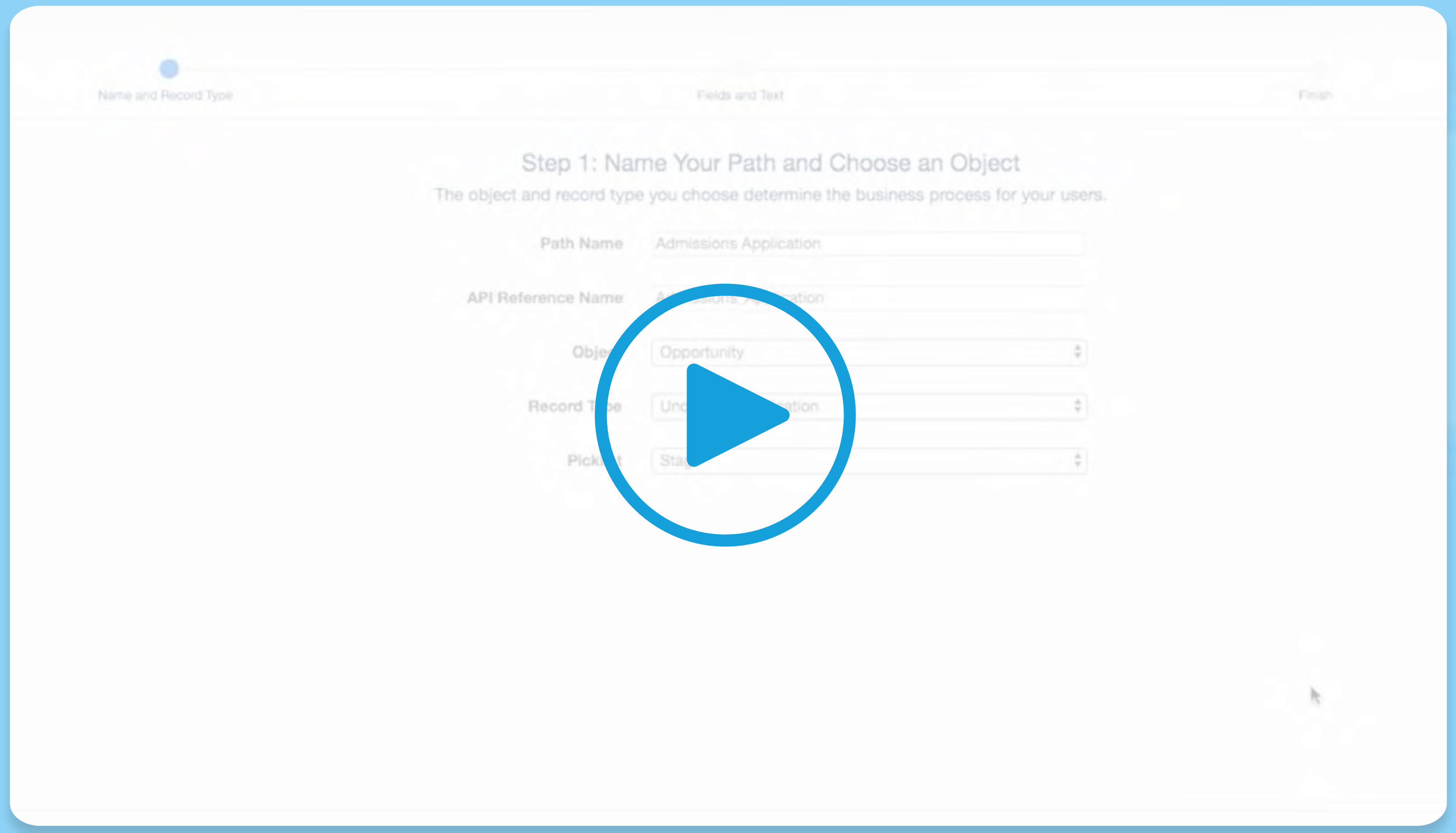
ACTIVITY

Design a Path

STEP 1	STEP 2	STEP 3
Prospecting/ Awareness Building	Prospect Engagment	Applicant Engagment
KEY FIELDS: Prospect Source	KEY FIELDS: Full Name, Address, Email	KEY FIELDS: Region

VIDEO

Building a Path



Engage Admitted Students

Once your students have been admitted, it's more important than ever to keep them engaged and ensure their support. After receiving their acceptance letter, it's likely that your admitted students are excited to join your campus, have lots of questions and want to know everything there is to know about your institution. Avoid summer melt by taking advantage of that excitement and keeping it going all the way through orientation!

Build Excitement with Communities

We already talked about an applicant community, but you can also utilize communities as an onboarding tool. All of the same benefits apply–quick reply times either via chat or via feed posts, self-service capabilities in the form of discussion topics and knowledge articles, and groups which help students feel integrated and connected to like-minded peers. You are already familiar with the tools that support these capabilities, so let's discuss some best practices for building an engaging and interactive onboarding community for your newly accepted students.

1. **LEAVE NO QUESTION UNANSWERED** - The best way to ensure your accepted students continue coming to the community for information is to answer all of their questions. This may seem obvious, but when you have hundreds of posts a day to wade through, the "no question unanswered" tenet may be difficult to stick to. One idea is to assign specific shifts or topics to your admissions counselors and student services support teams–this way no one feels overwhelmed and each person can focus specifically on either their time block or their topic, without distractions. Some institutions even use student workers or recruit current students to be "Welcome Ambassadors." This is particularly helpful because students especially like to hear from other students.

2. **HAVE A PLAN** - After the first few weeks of excitement, the posts and questions may begin to dwindle. What now? Has the community served its purpose? Absolutely not! The best way to keep the momentum going is to have a plan of action for the entire summer. Consider hosting weekly Q&As with important members of your student services staff, such as the registrar or career counselors. Information about course registrations and internships is always of interest to students, so it's a great opportunity to get them engaged. Another idea might be to ask group moderators for each group to share files, start off discussions, and share pertinent information at a regular cadence– spreading information over time keeps things interesting and doesn't overwhelm students with too much information at once.

3. **MAKE IT FUN** - Yes, your community is educational in nature, but that doesn't mean it can't be fun. Communities are fully loaded with interactive features. For example, consider throwing

out polls on what students are most excited about when they arrive on campus, or create entertaining groups, such as where to find free food on campus, or share their feedback. You can enable Recognition badges, which allow community members to give thanks for helpful comments or posts and rewards active users.

If you want to try your hand at building a sample community, try this Trailhead project!

Support Management with Service Cloud

Communities can offer a great deal of information and resources, but when it comes to unique or personal issues or concerns, nothing can match Service Cloud for admitted student support. With its Omni-Channel functionality and case routing and management tools, it is designed to streamline your support services. Here are just a few ways Service Cloud can help.

PERSONALIZED SERVICE CONSOLE - When you have a full caseload to manage, having an effective workspace can make all the difference. Service Cloud allows each admissions counselor to have their very own personalized console, equipped with all of the tools they need and nothing more. A split view allows a counselor to see their full list of cases on one side and zoom in on specific case details on the other. Additionally, a utility bar at the bottom can give quick access to frequently used functions, like taking notes or making a phone call.

CASE ROUTING - Once a student has been accepted, it is likely that their questions are better suited for other staff members–academic advisors, registrar staff, or career counselors. Service Cloud makes it easy to create assignment rules so that a question or issue on a specific topic automatically gets routed to the right office or team.

MACROS - A macro is a set of instructions that guides how something is done–for example, you might use a macro to select the right email template. Macros are best used for repetitive tasks and can help you save time and add consistency. You might set up macros to send emails at a particular step in a process–when a case has been resolved and is ready to be closed, or set a case status to "waiting for reply" after you've taken an action and need more input from your admitted student.

Simple to set up, but powerful in its application, macros are just one awesome feature in Service Cloud.

Onboard Smarter with Salesforce Advisor Link

From the moment a student has accepted admission to an institution, the work of advising begins. Students are excited to learn more about their program of study, to pick classes, and to get a pulse for the resources available to them. There is no better opportunity to set them up for success then at this onboarding stage. That's where Salesforce Advisor Link comes in! An advising solution, purpose-built for higher education, Advisor Link can help advisors by automating tasks, providing helpful templates, and offering insights into the student experience. Advisor Link ensures that students are ready for day one.

But there are even more benefits for students. Advisor Links answers the most common questions students have:

Who do I need to talk to?

Advisor Link gives students easy access to their Success Team, which includes any combination of advisors that can help them get acquainted with their new school and answer their questions, from academics, to financial aid.

What do I need to do?

Success Plans are an Advisor Link feature that allows advisors to create easy-to-follow lists of tasks to guide students achieve a goal. For example, you may develop a success plan for onboarding that includes submitting housing forms and health forms, attending orientation activities, and making an appointment with the registrar during the first week of classes. Students and advisors can keep track of their progress via their student portal, where they will get notifications when tasks are marked as complete or when they are overdue.

ACTIVITY #1

Student Tool Map

Map what admitted students need to know and match it to the appropriate tool.

WHAT ADMITTED STUDENTS NEED TO KNOW	RELEVANT SALESFORCE TOOL
Where to view course catalog	Knowledge
Who is on their Success Team	Advisor Link
Where to find resources/information	Onboarding Community

ACTIVITY #2

Success Plan Mock-up

Create a mock-up of a Success Plan for onboarding.

SUCCESS PLAN GOAL: COMPLETE ONBOARDING
***Sample Task**: Attend required orientation events*
***Sample Task:** Request final transcripts and AP score summary*
***Sample Task:** Schedule an appointment with your academic advisor*

Conclusion

The recruiting and admissions landscape has definitely changed in the past decade, however it has changed for the better. Prospective students are more informed, which also means that they are more engaged. They may expect more, but they are also eager to hear from you. They are ready to offer you their ideas and feedback, as long as you are willing to listen and incorporate them.

The Salesforce ecosystem is uniquely designed to amplify your reach. The tools that we have covered here are certainly not exhaustive–the ecosystem is vast and varied and can fit any number of custom requirements. However, our customers have seen great success with this toolkit and we hope that you will too.

As you try out the activities covered here, consider this an iterative process. Return to these activities each admissions cycle and consider what you've learned from the last round and how you can improve.

WE CAN'T WAIT TO SEE WHAT YOU BUILD!

Additional Resources

Admissions Connect Documentation

Get Started with Salesforce for Recruitment and Admissions

Import Common App Data

Pardot Engagement Studio: Recruitment & Admissions Use Cases

EDA Workbook

Enroll Best-Fit Students with Education Cloud

Education Data Architecture Documentation

Get to Know Marketing Cloud

Automate Marketing with Pardot Lightning App

Expand Your Reach with Communities

Salesforce Advisor Link Documentation

The Power of Us Hub

The Hub is a virtual community where nonprofit and education customers can collaborate, ask questions, and find the resources they need to be successful. See you there!