Education Cloud Recommendation Map
Follow this path to achieve your goals

Last update: October 2022
This document provides a step-by-step guide of recommended resources that lead you from a beginner to advanced Salesforce user. Follow the suggested path of resources to learn how to implement, realize value, grow, and go further with Salesforce.

Welcome and good luck on your journey.
Implement: Get Started
Begin your journey to success
Implement: Get Started

1. Get to Know Education Cloud
   - Salesforce.org Education Cloud Basics
   - Empower your institution to manage the entire student lifecycle and drive student success.

2. Explore Education Data Architecture (EDA)
   - Administer Education Data Architecture (EDA)
   - Learn how to set up and customize EDA at your institution.

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- How to Implement a Case Management Strategy for Education
  - Understand the basics of case management in Service Cloud and design a strategy for incoming cases.

- Educate Hub
  - Connect and collaborate with other customers in education.

- Salesforce.org Education Events
  - Stay informed on events run by the Salesforce.org Events Team.

- Get Started with Education Data Architecture (EDA)
  - Learn how your institution can get started with Education Data Architecture (EDA) in this hands-on workbook.

- Build an Integration Strategy like a Customer Success Architect (CSA)
  - Develop a strategy for integrating your systems with Salesforce and EDA.

- Education Data Architecture Documentation
  - Find everything you need to set up, customize, and use EDA.

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- Insights: Governance in Higher Education
  - Plan and implement a governance strategy for your institution.

- Welcome to Premier for Education Cloud
  - Familiarize yourself with Premier offerings available for education customers.

- Getting Started: Training Path for a Salesforce Sys Admin
  - Familiarize yourself with the basics of Salesforce administration.

- EDU Admin Fundamentals: Constituent Engagement
  - Learn about the tools available to support constituent engagement.

- EDU Admin Fundamentals: Set Up & Automate Cases
  - Learn how to set up cases and build automation to make sure your school community’s feedback is heard and addressed.
Implement: Drive Use
Learn to leverage key functionality and increase user adoption
Drive Use for Recruitment & Admissions

1. Learn About Salesforce for Recruitment & Admissions
   - Follow This Trailmix

GUIDE
- Get Started with Salesforce for Recruitment and Admissions
  Support your admissions process from start to finish with Salesforce and Education Cloud.

TRAILHEAD
- Student Recruitment and Admissions with Education Cloud
  Learn how to find and engage best-fit students.

INDIVIDUAL COACHING SESSION
- How to Implement a Case Management Strategy for Education
  Understand the basics of case management in Service Cloud and design a strategy for incoming cases.

TRAILHEAD
- Student Enrollment and Onboarding Toolkit
  Streamline student onboarding with Service Cloud and Salesforce Mobile.

TRAILHEAD
- Data Insights for Student Recruitment and Admissions
  Employ Salesforce reporting and analytics to make informed strategy decisions.

DOCUMENTATION
- Admissions Connect Documentation
  Find everything you need to set up, customize, and use Admissions Connect.

WEBINAR
- Get Started with Admissions Connect
  Understand how Admissions Connect works to help admissions teams

DOCUMENTATION
- Model Suspects and Prospects
  Find the best-fit applicants for your institution by using the standard lead and contact Salesforce objects.

Requires Premier or Signature Success Plan
Additional Investment
Recruitment & Admissions
Student Experience
Advancement
K-12
**Drive Use for Student Experience**

1. **Learn about Salesforce for Student Experience**
   - **Follow This Trailmix**
   - **GUIDE**
     - *Get Started with Salesforce for Student Experience*
     - Support your students throughout their learning journey with Salesforce and Education Cloud.
   - **TRAILHEAD**
     - *Student Services with Education Cloud*
     - Streamline student services and monitor engagement with Service Cloud case management.
   - **TRAILHEAD**
     - *Student Engagement with Education Cloud*
     - Strengthen student engagement through marketing automation and online communities.
   - **INDIVIDUAL COACHING SESSION**
     - *How to Implement a Case Management Strategy for Education*
     - Understand the basics of case management in Service Cloud and design a strategy for incoming cases.

2. **Support Learners with Student Success Hub**
   - **Follow This Trailmix**
   - **TRAILHEAD**
     - *Student Success Hub for Higher Education*
     - Empower your support staff and build a path to student success with Education Cloud.
   - **DOCUMENTATION**
     - *Student Success Hub Documentation*
     - Find everything you need to set up, customize, and use Student Success Hub.
   - **COMMUNITY**
     - *Student Success Hub Group*
     - Connect and collaborate with other Student Success Hub users.
   - **VIDEO**
     - *Getting Started: Using Student Success Hub*
     - Improve student success touch points in student support.
   - **WEBINAR**
     - *Student Success Hub: Appointment Scheduling*
     - Learn how to fully leverage appointment scheduling in Student Success Hub.

3. **Empower Support Staff with Student Success Hub**
   - **Follow This Trailmix**
   - **GUIDE**
     - *Appointment Scheduling for Advisors*
     - Best practices for using appointment scheduling for support staff.
   - **GUIDE**
     - *Success Plan Guide*
     - Best practices for using Success Plans for support staff.
   - **GUIDE**
     - *Success Plan Look Book*
     - Get to know various Success Plan use cases.
Drive Use for Advancement

Learn about Salesforce for Advancement

Follow This Trailmix

1. Get Started with Salesforce for Advancement
   Engage alumni and promote institutional growth with Salesforce.

2. Alumni Engagement with Education Cloud
   Strengthen alumni connections through marketing automation and online communities.

3. How to Implement a Case Management Strategy for Education
   Understand the basics of case management in Service Cloud and design a strategy for incoming cases.

4. Major Donor Relationship Management with Education Cloud
   Streamline donor management with list views, Kanban, Path, and mobile access.

5. Donor Insights with Education Cloud
   Employ lead generation strategies and analytics to deepen relationships with donors.

Learn how your advancement team can get started with Nonprofit Success Pack (NPSP).

Guides:
- Get Started with NPSP Planning Guide
- Getting Started with Salesforce for Advancement

Trailhead:
- Alumni Engagement with Education Cloud
- How to Implement a Case Management Strategy for Education
- Major Donor Relationship Management with Education Cloud
- Donor Insights with Education Cloud

Requires Premier or Signature Success Plan
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Student Experience
Advancement
Drive Use for K-12

1. Learn about K-12 Architecture Kit
   - **TRAILHEAD**
     - **K-12 Architecture Kit Administration Basics**
     - Set up and configure K-12 Architecture Kit to connect educators and families.
   - **DOCUMENTATION**
     - **K-12 Architecture Kit Documentation**
     - Find everything you need to set up, customize, and use K-12 Architecture Kit.

2. Support K-12 Learners with Student Success Hub
   - **WEBINAR**
     - **Center Your Learners with Student Success Hub**
     - Learn how to center your students with Student Success Hub.
   - **TRAILHEAD**
     - **Holistic Student Support with Student Success Hub**
     - Use Salesforce's K-12 solutions to deliver equitable and holistic student support.
   - **DOCUMENTATION**
     - **Student Success Hub Documentation**
     - Find everything you need to set up, customize, and use Student Success Hub.

3. Additional Resources
   - **VIDEO**
     - **Tableau CRM for K-12**
     - Familiarize yourself with Tableau CRM for K-12.

4. Community
   - **COMMUNITY**
     - **Sector: K-12 Education Group**
     - Connect and collaborate with other K-12 customers.

5. Other Resources
   - **INDIVIDUAL COACHING SESSION**
     - **How to Implement a Case Management Strategy for Education**
     - Understand the basics of case management in Service Cloud and design a strategy for incoming cases.
   - **WEBINAR**
     - **Structure Student Support with Program Management Module**
     - Understand how to integrate the Program Management Module into your support model.

Requires Premier or Signature Success Plan
Additional Investment
Recruitment & Admissions
Student Experience
Advancement
Realize Value
Achieve peak performance
Realize Value for Recruitment & Admissions

Additional Salesforce Tools for Recruitment & Admissions

Follow This Trailmix

GUIDE

Pardot Use Cases for Recruitment and Admissions
Use Pardot's Engagement Studio to engage prospective students throughout their admissions journey.

COMMUNITY

Admissions Connect Users
Connect and collaborate with other Admissions Connect users.

VIDEO

Tableau CRM for Recruitment and Admissions
Familiarize yourself with Tableau CRM for Recruitment and Admissions.

OTHER

Analyze Application Data with Admissions Connect Tableau Accelerator
Visualize application insights and trends by using the Admissions Connect Accelerator.

Requires Premier or Signature Success Plan
Additional Investment
Recruitment & Admissions
Student Experience
Advancement
K-12
Realize Value for Student Experience

Requires Premier or Signature Success Plan

Additional Investment

Additional Salesforce Tools for Student Experience

Follow This Trailmix

INDIVIDUAL COACHING SESSION

How to Plan Your Student Experience Community
Learn how to to build a strong and effective community for students in an educational setting.

BLOG

Transform Your Communications and Collaboration with Slack
Create digital headquarters for your institution using Slack.

OTHER

Analyze Student Success Data with the Tableau Accelerator
Visualize student and support staff data by using the Student Success Hub Tableau Accelerator.

Requires Premier or Signature Success Plan

Additional Investment

Recruitment & Admissions

Student Experience

Advancement

K-12
Realize Value for Advancement

Amplify Fundraising and Engagement

TRAILHEAD

Accounting Subledger for Education: Quick Look
Learn the basics about consolidating data between Salesforce and accounting systems.

Bridge CRM and Finance with Accounting Subledger
Understand how your institution can fully leverage Accounting Subledger.

FUNDRAISE WITH NONPROFIT CLOUD

GUIDE

Pardot Use Cases for Advancement
Use Pardot's Engagement Studio to engage alumni and donors.

Fundraise with Nonprofit Cloud
Learn how to manage donors and donations with Nonprofit Success Pack and Salesforce.

SALESFORCE.ORG CORPORATE RELATIONS GUIDE

GUIDE

Salesforce.org Corporate Relations Guide
Develop a strategy for corporate relations at your institution.

TRAILHEAD

Tableau CRM for Advancement
Familiarize yourself with Tableau CRM for Advancement.
Realize Value

Requires Premier or Signature Success Plan

Maintain a Healthy Salesforce Org

Follow This Trailmix

WEBINAR

Strong Admin, Strong Org: Data Quality Toolkit

Learn practical tips to center data quality at your institution.

WEBINAR

Strong Admin, Strong Org: Assess Your Org Strength by Using the Salesforce Optimizer App

Get to know Salesforce Optimizer app and how it can help keep your org healthy.

WEBINAR

Strong Admin, Strong Org: Create a Helpdesk Ticketing System with Flow

Walk through building a ticketing system with Salesforce Flow.

BLOG

How to Document Inside Your Salesforce Instance

Learn how to document your Salesforce setup and customizations.

TRAILHEAD

Data Storage for Educational Institutions: Quick Look

Create a data storage strategy for your school.

GUIDE

Healthy Org Workbook

Use this interactive workbook to stay on top of your org health.
Grow and Go Further
Achieve greater success using advanced features
Grow

Understand how the Salesforce release cycle works.

Follow This Trailmix

Keep Up with Salesforce.org Releases

Learn how the Salesforce release cycle works.

Follow This Trailmix

How to Use Design Thinking to Achieve Your Project Goals

Understand how design thinking can help you go forward with any Salesforce project.

How to Develop a Digital Engagement Strategy for Education

Create a data strategy that puts your constituents front and center.

How to Use Design Thinking to Achieve Your Project Goals

Create a data strategy that puts your constituents front and center.

Stay current with the latest Education Cloud release information.

Insights: Report in Education Data Architecture (EDA)

Learn how reporting works in Salesforce and EDA.

How to Develop a Digital Engagement Strategy for Education

Build a digital strategy that maximizes constituent engagement.

Requires Premier or Signature Success Plan 

Additional Investment

Fundraising

Program Management

Marketing & Engagement
Reach the Summit of Success

Get more resources to help you meet your goals. Explore Recommendation Maps for additional clouds.
Thank You