

Top Education Insights from Dreamforce 2024

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Speakers:

Speaker A - 39.14%

Speaker B - 23.48%

Speaker C - 37.38%

Notes:

- Technology is changing the whole experience from end to end. Here to tell us how, our VP and GM of education, Margo Martinez, and senior director of product marketing, Brad Schleicher.

- With ODU global, they've already increased their applications by 17.6%, which is pretty impressive. Also reduced their application processing time, which used to take them weeks and is now down to a couple of hours. That's really incredible efficiencies to unlock.

- What are some education applications, uh, around agents? What does it mean for education? Yeah. To save time for admissions staff to be able to reduce the amount of time that they have responding to prospective student inquiries. That personalized interaction might open the wallets a little bit more.

- Education customers can really relate to just the applications for a chatbot. Getting comfortable with each of those progressions is super important. Everyone is on a different level in terms of their comfort with agents and AI.
- Two customers that really stick out are CalArts and Occidental. CalArts wants to build relationships with alumni so they can become the next generation of donors. Occidental is focused on mentorship. How do you best match the right alumni with the right students?
- Here are the top three ways institutions can leverage AI today. Connect prospective students with agents. Generate student summaries for advisors. Capture alumni engagement insights.

Speaker A

00:00:00

Whether you're a parent, a student, or a teacher, technology is changing the whole experience from end to end. Disruptors are breaking the mold. Here to tell us how, our, uh, VP and GM of education, Margo Martinez, and senior director of product marketing, Brad Schleicher. Uh, Margo. Brad, thank you for coming and welcome. So, Margo, let's start with you. Um, who are some of those education trailblazers that we need to know about?

Speaker B

00:00:26

Thank you for having me so much, Carolyn. First, uh, you know, institutions are really looking to disrupt their old processes and reinvent them to really improve the student experience. And that goes for students as well as staff and parents. And, you know, if you can just look to old Dominion University as a perfect example of this, they have very aggressive goals, but they're well on their way to doubling their enrollment within just five years for ODU global. Incredible. And that's especially incredible considering the state of enrollment today within higher education. And so what's really inspiring is to think about Odu's leadership. Uh, their leadership has really embraced Salesforce to become a salesforce first campus. And one of the things they really talk about is being a high touch, high value campus and really delivering that high value to their students through high tech. And I love that. I love that they're doing that. It's really, really impactful.

Speaker A

00:01:25

Yeah. Well, I also think that the expectations of students today are much different because they are surrounded by this technology in their daily lives. So it's really important to also provide them an unbelievable experience. So we often don't think of students as customers, but they really are. So when you're talking to organization, uh, to education organizations, and they're thinking about that student experience, what have been the biggest differences, Bradley, that they're trying to explore?

I think the big thing that sticks out to me is, um, it really comes into, if you're a student, how can you make it as easy on them outside the classroom? And their course loads should be challenging. Right? And so I think it's the responsibility of the institution. If you're going to admit a student, if you're going to keep that student throughout their program, you should be going that extra mile to do that. So I think it comes with a, giving them access to services and support, wellness resources, things like that, all the things that a student's going to need and making that as easy as possible for them to access.

Speaker A

00:02:25

And a lot of it is around communication now, too, while they're on campus. Like you mentioned, parents, students, educators, being able to have that conversation about their in classroom experience and out of classroom experience. Um, when I was at university, I was student body president. Go Redbirds. Uh, Illinois State, here we go. Um, those connections that I made there, um, my vice president two weeks ago sat on a plane next to you, the president of the university that we worked with then, and they sent me a picture. Those long lasting connections now with technology can continue, especially around alumni relations and things like that. So, um, when we think about, um, old dominion, um, are there any statistics that you can share? What are people experiencing? What are our customers experiencing around using Salesforce?

Speaker B

00:03:15

Absolutely. With ODU global, they've already increased their applications by 17.6%, which is pretty impressive. Um, but also they've reduced their application processing time, which used to take them weeks and is now to just down to a couple of hours. So that's really incredible efficiencies to unlock.

Speaker A

00:03:34

For their institution and that starts that experience. Right. Uh, one of the most nerve wracking things is waiting on that acceptance. And so being able to process that faster, you're setting the expectations that the university that you choose is going to be there and actually, uh, able to help you. Like you mentioned, um, we have been talking a lot about agents. It is agent force everywhere. So what are some education applications, uh, around agents? What does it mean for education? We'll start with you.

Speaker B

00:04:04

Absolutely. Yeah. I think with respect to agents, we're really excited about it. To save time for admissions staff to be able to reduce the amount of time that they have responding to prospective student inquiries. Uh, that's a way that generative AI can really help an agent for, can really help come in and streamline. And then for your advising teams, being able to get those student summaries, you can get those with education cloud to prepare for

important student meetings. And then for your advancement staff for fundraising, you can get donor briefs by getting those summaries of all of that donor information so that you can prepare for those important meetings. So really engaging across the whole student life.

Speaker A

00:04:42

That's great, that personalized information. What was their experience like while they were here? What have they been doing since university? And how can you connect what they're gift might mean? Uh, I feel like that personalized interaction might open the wallets a little bit more. So that's pretty amazing. So Brad, when you're talking to education customers and thinking about agents and AI, what are they excited about, what are they nervous about and what advice are we giving them?

Speaker C

00:05:08

Well, I think they definitely can really, um, relate to just the applications for a chatbot uh, I know that's, I don't want to limit the potential of agents, but that is where I think most education customers really identify. I think beyond that, it's understanding what are the potential of agents, because what they're used to is something that's very blocking and tackling. It doesn't learn, it doesn't adapt. And just having them understand that to the point where they can start to build out their own use cases for it, I think, is going to be really, really exciting.

Speaker A

00:05:41

I think that's why I love agent force. We're meeting our customers where they're comfortable. Everyone is on a different level in terms of their comfort, uh, with agents and AI. And so if they're ready for bots, they're ready for bots. And then getting comfortable with each of those progressions is super important. Um, I would have loved that self service when I was in school. Um, I'm curious, which institutions should keep an eye on or what should they keep an eye on when it comes to the alumni experience and that engagement and interaction?

Speaker C

00:06:13

Uh, I think just in general, it's about how are you building relationships? Uh, how are you connecting with those alumni in really unique ways? I think just two customers that really stick out are calarts and occidental. And they're kind of going about not just the alumni, but the donor experience a little bit differently for CalArts. They're a young institution. They were founded by Walt Disney. So they're super unique, uh, in their own right, but they're in hyper growth mode. They really want to focus on how they build those relationships with their alumni so they can become kind of the next generation of donors. Occidental, on the other hand, still really focused on relationships, but applying it in

different ways. They're really focused on mentorship, and that's a new area that we're focused on as well. What they want to do is utilize the unique experience of their alumni. They want to utilize the work experience, the skills, the things that they've built outside of school, and apply them to current students. Right. So it really comes down to how do you best match the right alumni with the right students so the student can really raise their experience while they're at the institute?

Speaker A

00:07:16

Um, final question real quick. 30 seconds. You're talking to education customers. What do you tell them you are most excited about when it comes to technology and education?

Speaker B

00:07:26

Absolutely. Saving time. Institutions are always called on to do more with less and more with less, and it's a very, very tough job, and so it's the education institutions. These are people that are passionate, but they've got a lot on their plates, so it's helping them save time in everything that they do.

Speaker A

00:07:45

Well, thank you. And thank you to Margo and Brad for your insights today. To check out all of our education content on Salesforce plus, scan the QR code on your screen before we go. Brad, our audience loves when we give them tips and tricks to put to use. So what would you share with our viewers?

Speaker C

00:08:00

Sure. So let's keep learning about how technology is changing education here are the top three ways institutions can leverage AI today. Number one, connect prospective students with agents. You can employ agents to engage with prospective students when it matters most. You can personalize responses twenty four seven to those prospective students and their inquiries while keeping staff in the loop, all while delivering better, faster service throughout the recruitment and admissions journey. Number two, Einstein student summaries for advisors advisors are overworked with caseloads and with embedded AI in the flow of work. It's really easy for advisors to prepare for their student meetings with helpful advising summaries that capture key details such as alerts, appointments and pulse check responses. And last but not least, number three, capture alumni engagement insights. Let AI do the heavy lifting by generating a curated snapshot of each alum, including their engagement insights, event attendance, giving info, and more. And that snapshot is going to really help advancement staff create deeper alumni relationships and hopefully lead to better engagement and loyalty. There you have it. The top three ways institutions can leverage AIh.