Elevate Every Education Journey with AI + Data + Action

Words	7,900
Duration	00:47:44
Recorded on	Unknown date
Uploaded on	2024-09-17 21:23:00 UTC
At	Unknown location
Using	Uploaded to aliceapp.ai

Speakers:

Speaker A - 18.22%

Speaker B - 6.75%

Speaker C - 6.82%

Speaker D - 9.72%

Speaker E - 15.05%

Speaker F - 8.78%

Speaker G - 14.04%

Speaker H - 14.86%

Speaker I - 5.76%

Notes:

- Welcome to the Education keynote. We're talking innovation and education AI. We also got some incredible education trailblazers here in the house. Can't wait to hear from them in just a moment.

- Doctor Kiven: We went live in March in Odu global. From the point of inquiry all the way through graduation and beyond, we've seen improvements. We have consolidated all of those into the Salesforce platform. Now the advisors are having a much richer experience with the students.

- ODU CEO: Salesforce is key to our vision and our future. We see it as this unified single pane of glass that we can track and view the student journey. Don't take that as just another system implementation. Sales for implementation is an opportunity to improve and innovate how you support your students.

- Salesforce is thrilled to introduce data cloud for education. Agents can securely connect data across your institution and take intelligent action for you. As we enter this AI era for students and staff, AI will be the guide on the side.

- UH announces intent to build next generation student information system capabilities along with education cloud. Now we're bringing to you the next phase in our journey with our summer release registration and holds and blocks. It's an incredible time and we are so excited to bring this to you.

- Dreamforce is just getting started. We have curated a great list of sessions over the next couple of days. It is my distinct pleasure and honor to announce we're bringing it back for a 13th year. March 11 through 13th next year in Chicago, Illinois.

Speaker A   00:00:09

Welcome to the Education keynote. Thank you so much for joining us here today. You know, um, I always love bringing this community back together. This is an incredible community. And, um, Dreamforce is always a special time where we come together, we connect, we learn from one another, but at the same time, this is always a really tough time, I think, for education because it's one of the busiest of the year in the academic calendar. So in true Salesforce fashion, we got to start with a thank you. Thank you so much for making the trip here. Thank you for taking time out of your schedules. Thank you to our customers, our partners, our, uh, higher ed Advisory council, our product advisory council. Yes, let's hear it. We're going to have a great couple days together, but we got a lot to get to. So we're going to do a couple things today. First and foremost, we're going to connect some of the dots between what you saw in this morning's keynote, some of the dots in this morning's keynote and what that's going to mean for education. We also got some incredible education trailblazers here in the house. We've got old Dominion University here. We've got Cal arts, we've got Occidental College. Can't wait to hear from them in just a moment. And folks, this is Dreamforce. We're talking innovation here. Education innovation and education AI. Before we get to everything, though, I want us to think back to where we were a year ago. We were back here at Dreamforce, of course, and

the conversation around AI was very different. We had barely scratched the surface of what AI and this revolution was really going to mean for education. Right? Because back then we were talking about how students were using AI for plagiarism. But you fast forward to today. As many of my colleagues have reminded me, this conversation has shifted quite a bit. We're talking about AI as an advantage for your staff to be more efficient, be more productive. So the conversation has shifted, but so has the technology. When we think back to Salesforce has been doing predictive AI for more than ten years. AI is nothing new. But the last few years have been really about generative AI. How can you use AI prompts, how can you use large language models to create something totally new? And now we're entering a new era, one of autonomous agents, not just an AI assistant, but an AI partner, one that's going to work parallel with your staff side by side to help you scale, to take action and complete tasks automatically. I'm talking about agent force. I'm talking about agents we're going to get to that a little bit later as well. So again, conversation shifted, technology shifted. What's going on on your campuses? Well, we're proud to say, I think most of us are probably proud to say that your staff's at the forefront of AI adoption already. They just happen to be using tools that haven't gotten your blessing, haven't gotten the it blessing or the green light in so many different ways. And despite this, when we talk to leadership, they're still really enthusiastic about the future of AI and the potential for AI. They just want to do it a little bit more responsibly. They also want to be doing it in a much more trusted way as well. Who doesn't, right? And so can we go to the next slide, please? So where do you really start with a lot of this? It all comes back to your data because only your data is going to give AI the context that it needs to work effectively for you. And folks, you're in education. Um, I'm going to go out on a limb here. You guys have plenty of data, general agreement here, but you're also using a lot of different point solutions. And with those point solutions come what we call islands of trap data. And on those islands are really impactful, really insightful student insights, but they're incomplete because they don't give you that full picture of who that student is. Raise your hand. Have you ever felt like you were trapped on one of those islands? You were looking for more insights and you didn't quite have it? Just so we're clear, nothing against islands. Great for vacation, terrible for data, always been bad for data, right? You need unified data to take advantage of AI. And the good news is when we talk to leadership, unified data is at the top of their list. It's a priority really, uh, across the board. And many have already taken some initial steps to build a data strategy that they can make use of AI, but many still need a lot of help and that's really where Salesforce comes in here. Salesforce is going to bring together CRM AI in all its forms, especially now as it continues to evolve your data and your staff in a much more trusted way. We know that the AI that's going to have the biggest impact is when it's embedded in the systems you use every day, like Salesforce. And so we've built AI into all of our products, all of our industry solutions like education. And here's the important part, we've built it into your specific flow of work. We've built it for your use cases. Right. So you can really, uh, tap into all the benefits that AI has to offer. You can automate your processes, accelerate your impact, and very simply, save a lot of time with the things that you're doing every single

day. And we're going to get into more of these exciting use cases with some product announcements a little bit later. But first, folks, are we ready to hear from a customer story? All right, so I'm going to need some energy. I'm going to need you to put your hands together and please give it up for my colleague Kelly Kitchen and the trailblazing leaders from Old Dominion University.

Speaker B   00:05:49

Thank you, Brad. Thank you. Thank you. Well, old Dominion is leveraging data to unify and personalize the student experience at every step along the way. I'm honored to be joined today by doctor Chris Malagiani and doctor Lisa Kiven, who clearly got the fuchsia memo, uh, to talk more about what they're doing. So thank you both for being here. Um, Old Dominion Doctor Mulaldiani is a relatively young institution, but has experienced rapid growth, has an increasingly diverse student population. Two things that you said to me when we chatted about that that really resonated was staying true to your ethos and about the DNA of old Dominion. Would you share a little bit about what that means and how it shapes your approach to your students?

Speaker C   00:06:32

Yes, absolutely. Thank you so much for having us here today. I'm excited to share how, in partnership with Salesforce at ODU, we are changing education. And you're right, we are a fairly young institution. We just became a four year institution in 1962, but since then, we have embraced change. We have recently become a research one institution, and we recently acquired a medical school. Congrats to us. Right? So with all these changes, though, and with evolution, change, and innovation being ingrained in our DNA, we managed to stay true to our students and their ethos and our, uh, one monarch nation mission. What we mean with that is that we always try to understand our students, their unique values, their unique needs, and meet them where they are. We are very intentional in partnerships with vendors like Salesforce because we want to make sure that they can support us in staying student focused, forward focused, and also committed to change digital learning and student success.

Speaker D   00:07:33

Fantastic.

Speaker B   00:07:34

Well, first, congratulations on becoming an r1 university. It's great news. Very exciting. Something that you said earlier, too, about change, evolve, innovation, and one monarch nation. I love both of those so much. Um, Doctor Kiven, you were here with us last year and you shared your vision of a holistic view of a student. And you also shared a pretty aggressive goal of double enrollment growth within five years for ODU Global. Would you

share how you inspire your team along meeting both of those and how it shaped your approach?

Speaker E   **00:08:06**

Yeah, absolutely. And thank you again for having us here today. When we set out to double enrollment, we knew that we could not just double our resources. No one has money like that in higher education. Right? On top of that, I knew that I wanted to move from a more traditional student registration model into that holistic model that you were just talking about. But with that idea came challenges. My teams were working in silos. It was almost impossible for them to collaborate with each other. And although we were very rich in data, we were very poor in actionable insights. Those islands that Brad was just talking about was our reality. Absolutely horrible to be operating in that and expecting to scale that type of growth. Right. So we had to set out for a solution. We needed something that would allow us to be agile, data driven, and provide a seamless experience, not just for the students but also for the employees. And then on top of that, we had a non negotiable. We had to have something that would allow us to personalize the experience for the students because at the ethos of what we do, as Krissa was talking about, is this idea of a high tech, high touch environment. So thankfully salesforce and education cloud checked off all the boxes. In fact, it's gone so well for us that we are in the process of integrating the entire university to become a salesforce first institution, which is fantastic. I know, right. So m with that obviously comes a lot of change management and I think that's where the inspiration for the staff comes in. And for me personally that took two approaches. The first was really including the staff early on in the conversations so that they felt included. And that meant for us the discovery calls that were happening with the implementation partner and our salesforce partner, getting them in the room and allowing them to ask questions and being a part of that conversation. And then secondly, helping them understand the value that they played in the transformation. So it wasn't just about the developers coming in and doing this or maybe the higher ups making decisions, but they as the employees and the people working these processes had value in this. And so we put them on work teams, we included them in the decisions that we're making. We had them develop the workflows that were going to be developed and that I think really made an impactful experience for them as we were going through the transition.

Speaker B   **00:10:13**

I love that painting the vision and letting them be part of it and then showing them the value super powerful. Well, to move from a registration model to a student development model is an undertaking that's not exactly small.

Speaker F   **00:10:26**

Right.

And it takes a total team effort. The cross functional partnerships that you have and the change management that you've worked on. Could you share Doctor Mulagiani a little bit about that? Because I think there's a little bit of special sauce there.

Speaker C   00:10:41

Yes, absolutely. First of all, let me tell you that the toddy. We don't follow best practices. We establish best practices. Yes. And our cross functional collaboration is key to that. We bring together processes, people and technology. And when I say people, I mean all people. We bring the technologists, the business analysts, the pedagogical expert and the student support experts. Together we have created, um, the one monarch Nation Innovation initiative. Consider that as a center of excellence that all these people work together. All the different stakeholders around campus come together on this shared vision of student success with a very strong, uh, leadership support straight from the president's cabinet. Throughout our processes we also have uh, adopted phased, uh, approach crawl Wok run into our Salesforce implementation and that allows us continuously to have this thoughtful execution of these projects.

Speaker B   00:11:39

There's one monarch nation, again, not just for students, but also for the engagement and infrastructure to drive that innovation. You talked about a phase approach. Doctor Kiven, could you tell us where you are in that phased approach, how you're serving students and a little bit about the results you're seeing?

Speaker E   00:11:53

Yeah, absolutely. So we went live in March in Odu global. So we're still relatively new in the system, but we've seen some tremendous improvements and I'd love to share those today, especially for those who are just getting started. Um, and I know that this might seem like a strange place to start, but appointment scheduling was a major headache for us and it was causing a lot of problems in between teams. When you have teams like how mine were set up, where I have folks working with prospective students, people working on the admissions team, folks working with the admitted students, going through registration, all the way through graduation, they were all using separate appointment scheduling systems. And so we have consolidated all of those into the Salesforce platform. And that's powerful because that means every single person can see what's happening with the student, regardless of their role within that student lifecycle itself. So that was a major win for us at the get go, at the immediate get go. If you look at the student lifecycle process from the point of inquiry all the way through graduation and beyond, we've seen improvements at every single step. So if you look at the inquiry phase, we've been able to engage with a higher qualified prospect student in a much more personalized way. We're using journeys with these students, and what's happened in that process, we're seeing a

higher level of engagement with those students, which is yielding more applications. That's how you're gonna double enrollment, right? You're not gonna double enrollment with the students that you have. You've gotta get new people in the door. And so that prospective student group is really key for us. It's also translated into our admissions team. So our admissions team was running about three to four weeks to go through an entire admissions cycle with the student. Now we are down to hours. And for a, uh, society that expects immediate results or immediate responses on something, we need that to be competitive in this type of a landscape and scale the way that we grow. We were also finding a lot of melt. So as I was mentioning before, the different teams were working in different systems, and every time a student would go through a certain stage, they would drop off because the data wasn't following them from one system into another one. And so this melt was occurring where we couldn't get that student gathered up and then move them into the next place in a way that seemed, number one, seamless, but also for the staff working with them, you know, the data being able to follow, for them to have that conversation and support them in the right way that they needed. And so having them all in the same system now meant that when the student gets admitted, it's a seamless transition. All the information is going right to the advising team. Now the advisors are having a much richer experience with the students because they can see the student's story. All the things that happen with the intake process, all of the things that were happening during recruitment, they can see the student's profile, and that means that when the student shows up for the appointment, they're getting a higher level of rapport built and a much faster rate, and they feel like the advisor cares for them.

Speaker B   00:14:35

That's amazing. So seamless, immediate across a life cycle. Just remarkable. The work that you're doing. My last question is actually for both of you. One is, as you think about the future and the role of technology, how do you see Salesforce impacting your students and staff? And the other is, what advice would you give to others who want to accelerate their digital transformation journey?

Speaker C   00:14:59

I can start. First of all, I want to let you know that Salesforce is key to our vision and our future. We see it as this unified single pane of glass that we can actually track and view the student journey. And we aim to take advantage of untapped data that we have been gathering all these years and be able to provide this more sophisticated support throughout the student journey, from the very early engagement to graduation and beyond, when they become alumni or lifelong learners. We also started looking at data cloud because we want to have these unified systems and data to allow us to really work with AI. We have high goals with AI. We want to be proactive and reach our students where they are, provide what they need, when they need it, and in the form that they prefer to receive it. And that's key. We are also implementing tableau. We have the

opportunity now to visualize data and communicate across campus better. This allows for actionable insights, not only for our student services, but also our internal strategies. And just for a piece of advice, the only thing I have to say is that don't take that as just another system implementation. Sales for implementation is an opportunity, an opportunity to improve and innovate how you support your students.

Speaker B   00:16:18

That's fantastic.

Speaker E   00:16:19

Yeah, I would just add to that and say I've gone through probably five different systems during my 25 years at ODU, and with this particular implementation, we did something a little bit different. We didn't just lift and shift what we were doing into the salesforce platform. And I would encourage all of you who are just beginning your digital transformation to consider that to be an opportunity to really look at what you're doing. How are you supporting your students? What is the staff's experience and what is the most ideal step? You don't want to just take what you're doing and pull it over, because what you're doing right now may be a function of the system that you're using, whether for good or bad, the way the system is set up is a lot of times driving how you interact with your students. And so for us, we took a step back and really took it as an opportunity to create those best practices that Chris was talking about.

Speaker B   00:17:10

Well, thank you so much for sharing. I feel like I could drop the mic right there. Um, but I admire your passion and your energy for your students. I love the one monarch nation. Thank you so much for being here. Please join me in thanking them. And that is not all you're gonna hear from ODu. They'll be joining us, College of Dublin and Hayward Unified School District, tomorrow in a trailblazer panel, making an impact with education cloud. And it's also not the end of the customer and product innovation we're gonna talk about today. Please join me in welcoming my colleague, Margo Martinez.

Speaker G   00:17:47

Amazing, wow, amazing. An incredible, incredible amount of innovation. And uh, really exciting to hear how Odu is reinventing themselves and uh, really rethinking everything with Salesforce at the center. And I love what Doctor Kiven just said about being data rich but poor in actionable insights. That is so similar to what I hear from so many of you across k twelve and higher education. And we know that data is critical to understanding who your constituents are and as well to building those relationships. And we know that you have lots and lots of data and that's great. But. And there's always a but, right? But what good is that data when it lives here and there and everywhere? And I'm going back to

that trap data that Brad was talking about. We want to help you unlock and bring meaning to all of your data. And so today we're thrilled to introduce data cloud for education. Awesome, awesome. Uh, yes. Imagine being able to unify your constituent data, bring it together and take action in education cloud. With data cloud, you can bring together data from your sis, your lms, other systems. You can unify all of that within education cloud and you can take action. And we know that unifying your data is a transformative step in its own right. But it's also important to lay the foundation for bringing AI into the flow of work across your institution. As you heard in the main keynote we announced, agent force agents can securely connect data across your institution and take intelligent action for you. Agents can ask follow up questions, they can recommend actions and take actions, and they can also loop in your support staff when needed. Really think of these as a next generation of chatbot. But this is different. It's much, much more powerful. This really transforms what's possible in the realm of student and staff self service and the support experience that you can provide for your students. It's exciting to think about what's to come next on this AI journey. And I love what Doctor Currie at UH, Unity Environmental University says. As we enter this AI era for students and staff, AI will be the guide on the side so that we don't waste time. It's exciting to think of what's to come next. And as we've shared, we're building AI into the flow of work across the entire Salesforce platform. With marketing cloud AI, you can automate personalized engagement at scale. And with tableau pulse, you can quickly get insight into key metrics and you can understand what's happening in terms of trends in your recruitment, retention and fundraising. And uh, with Slack AI, you can collaborate with your colleagues, find answers faster than and get more done. Absolutely incredible amount of innovation across the whole salesforce platform. But now let's take a look at a lot of the purpose built innovation that we are bringing to you in education. We have brought to you a ton of innovation in the past year with education cloud. Just take a look at all of these capabilities live today with education cloud. We continue to innovate across the student lifecycle and enhance the student experience in our next release. And let me share with you some of the things that we have planned for all of you recruiters out there. Imagine being able to respond to inquiries with generative AI. Now you can with inquiry response management and agent force. And uh, for all of you admissions directors, imagine being able to understand the full prospective student funnel from inquiry all the way through application and opportunity into the enrolled student. Now you can. And once that student is enrolled, we know that well being is top of mind for many of you across k twelve and higher education today. For all of you who are tracking student well being and student success, imagine being able to track those wellbeing trends over time and respond. Now you can with pulse checks and watch lists. And uh, for all of you that are trying to understand students best and really meet with them and meet with their needs, whether that be student support staff or others. Now you can get auto generated student summaries helping you prepare for those appointments, but we know that many of you are looking to modernize student management processes. Today, the policy landscape continues to shift with the Department of Education and states requiring data and insights into student success as well as workforce preparedness. And legacy

technology is not always able to meet your evolving needs. And so today we're thrilled to announce our intent to build next generation student information system capabilities along with education cloud. We started this journey at UH, Dreamforce last year with our learning program builder and we continued our journey with intelligent degree planning. And we continue to invest in our degree planning capabilities with what if analysis so that students can plan their courses and chart different paths. And now we're bringing to you the next phase in our journey with our summer release registration and holds and blocks. It's an incredible time and we are so excited to bring this to you. So without further ado, to bring all of this incredible innovation to life. Who's ready? All right, please welcome to the stage my friend and colleague, Vanessa Wright.

Speaker H   00:24:39

Thanks, Margot. Uh, did you know that a student who has a great university experience is 31 times more likely to become a proud alum. It's a pretty staggering number. Well, today I'm going to show you how to take that stat and turn it into an action plan for your institution. Powered by the Salesforce platform when it comes to recruitment and admissions, prospective students don't always know where to go for help. That's why it's critical to meet them where they are with multiple entry points for different types of inquiries. But how can we take that support to the next level? Powered by agentforce now recruitment teams M can launch autonomous admissions agents with customizable topics to deliver personalized responses that are both impactful and scalable. This is where our agents really shine, delivering the necessary support while freeing up time for your internal teams. And with opportunity automation, all of these interactions are captured for your recruiters, helping to ensure that every prospective student receives tailored information about their specific academic interests. And after your students are admitted, they of course, continue to be surrounded by support. Imagine a second year student who is concerned about declaring the right majority who is overwhelmed with her course load because she wants to graduate early. With pulsechecks, you can capture student sentiment and overall well being information with just a few quick questions, making them really easy to fill in. I'm going to show you in a minute how advisors can use these pulse checks to help address well being concerns. But how can we help deliver students personalized responses around the clock? With an advising agent, students can get the answers to the questions they need directly in their portal at a time that's convenient for them, whether they have a question about the upcoming ad, uh, drop date, or want to know what the process is to declare their major, or here just need support. Einstein's here to help. Now our sophisticated agents are able to deliver actionable recommendations that guide students to available services such as mentoring. And all this is happening in one place, making it a truly seamless experience for your students. As you can see, students aren't just dedicated to one part of the lifecycle. They can be used throughout, uh, to address your institution's evolving needs. And with Salesforce, you can set up automated communications to help nurture your students and guide them to action. This

allows you to put your students in the driver's seat and allows them to self serve so that they can do things like comparing different programs side by side. Now this view gives intelligent insights to help make your students make the right choices that best align for their goals. And now students no longer need to spend hours for program and credit requirements looking through various systems and pieces of paper. With our brand new degree plan templates, you can help your students by providing a recommended sequence, helping them see the fastest path towards completion, and take the guesswork out of which courses can satisfy their various requirements. But that's not all. We now include real time validation to help ensure that pre and co requisites are also planned properly. Thanks. All of this together really helps to make the entire process visual, intuitive, intelligent and frankly, even a little fun. This is how Salesforce is helping to set your students up to succeed. And for our advisors, with hundreds of students in your caseload, you need to be able to work efficiently and have access to critical data at your fingertips. With our new Einstein student summaries, you can now pull together information from across the advising record and in one click use AI to generate a cohesive summary, giving you incredible insights. Talk about a game changer and with Pulsecheck trend data, your advisors can now visualize responses over time, using all of this information to create a tailored watch list for them to help monitor students academics and overall well being. Filtering for these at risk students has never been easier. Empowering your advisors with insights and actions is just one way that Salesforce is different. And now I'd like to welcome Margo back on stage to give some additional exciting announcements.

Speaker G   00:30:27

Amazing, Vanessa. Uh, awesome. Now, don't leave the stage just yet. We know that a student's journey doesn't stop there. In fact, at ah, last Dreamforce, we announced our fully featuring advising or, sorry, our advancement alumni relations product. And we continue to invest in this critical solution area. It's really critical to see how the student and the alumni journeys can connect. For all of you fundraisers out there, imagine being able to prepare for those important donor meetings, getting AI generated, summary of engagement history and donor interests. Now you can with donor briefs. And for all of you program coordinators out there, imagine being able to see summaries of your mentors and mentees so that you can more easily match your students and alumni. Now you can. And for all of you alumni, ah, relationship directors, imagine being able to see the full impact of your alumni on your institution, bringing in all of their engagement on campus and off, really enabling you to see the true impact that they're creating. Now you can with alumni engagement insights. And now to bring all of this incredible innovation to life, please welcome back Vanessa.

Speaker H   00:31:55

I didn't go anywhere. Well, I spoke earlier about how the student experience is really

critical to building an active and engaged alumni community. I'm excited to now show you some of those exciting innovations towards the second half of that connected experience. Speaking of engagement, when it comes to facilitating mentoring programs, it is so much easier now with the ability to compare mentors side by side and use AI to generate mentoring and summaries. This allows you to really see the impact a potential mentor can make for each mentee and select the right mentor for the very best relationship. But the engagement doesn't stop there. With Slack, you can connect your mentees and mentors and leverage that really powerful summary to help make the introduction and begin to build the relationship. Let's take a look at some exciting enhancements for advancement teams. First off, our brand new alumni engagement insights, powered by data cloud for education. These allow you to pull together data in one click from across your institution, all of those islands of trap data and summarize them right here with these powerful summaries and powerful insights for your users. Now, this component is incredibly powerful, not to use that word again. Um, here we're able to use configuration and not code to build, um, the engagement and philanthropic insights that are the best for your teams. You see here four different instances of the same component, all pulling different calculated insights directly from data cloud and your relationship. Officers responsible for fundraising can use AI to generate donor briefs. These can pull together all of the detailed preferences and giving history for your donors, allowing you to work smarter, personalize outreach, and deliver critical information to your leadership to prepare for important meetings, ultimately strengthening the relationship between your donor and the institution. And when it comes to metrics advancement teams need to go to a level deeper. With tableau pulse, you can view fundraising details from across your institution and analyze trends over time. This connection between data and insights in one holistic place allows you to make improvements and view your overall engagement. Really exciting stuff, huh?

Speaker G   00:34:46

Huh?

Speaker H   00:34:48

Okay. Well, it has been so great to be able to share with you, uh, our recent innovations, but we have so much more planned. I invite you to attend one of our two roadmap sessions this week. One tomorrow morning together, Thursday afternoon. This is going to be your chance to really see what we're going to be unveiling at next year's Dreamforce. And with that, I am so excited to introduce my colleague Navneet Johal and two amazing trailblazers from Cal Arts and Occidental College.

Speaker I   00:35:24

Thank you, Vanessa. It is amazing to see all of that innovation in education cloud and, um,

across the salesforce platform. But it's even more amazing when we get to have trailblazers talking about how they're using this fantastic technology. So we're really glad to have not one, but two lovely advancement leaders here today. Katie, Natalie, thank you so much for joining us. It's lovely to have you here. Now you're doing a lot to advance the missions of your institutions. So what is top of mind for you today, and how has your past experience experiences shaped your perspective today?

Speaker F   00:36:02

Well, thank you for that question. I'm a professional fundraiser. I've been doing it for multiple decades, and I would say that, of course, relationships are everything. I have, uh, been successful only because of the people that I've been fortunate enough to engage and be passionate about our universities. The, uh, one thing that I'll also share is the fact that I feel as if CalArts is a special place because it was founded by somebody you might have heard of. His name was Walt Disney, and so he founded the company and our school. Isn't that cool? But he decided that he really wanted to connect all of the creatives. So while he was an animator, he was also a visionary. And he thought that if all of the creatives could be in one university together, it would only make them stronger, better, and even more creative. He was right, because we have some pretty incredible alumni. But, uh, in doing that, that's something that I try to carry forward, which is that connection back to creativity and how we engage donors in what we do. And so we really do have to be able to try and track and have their locations, their connections, their engagement with their alma mater, and. Or just if they're passionate about CalArts in general, how do we know and how do we track them? And so that's what we were really looking when I joined eight months ago, CalArts. What we could accomplish with the help of Salesforce.

Speaker I   00:37:25

Yeah, that's great, Katie. And I love the focus that you've had on the relationships for so long now. Natalie, you know a thing or two about relationships and have got some deep connections to oxy, right?

Speaker D   00:37:35

Yes. Hi, everyone. Uh, Natalie Greenhouse, Occidental College. Um, my occidental journey began, uh, before my lifetime, when both my parents were undergrads, met there, married on campus. My father in law was also, um, enrolled at the time. Fast forward 45 years, and here I am, an alum, an employee. I'm married to an alum. My daughter's in the preschool, so I pay a bill to a private liberal arts college. Um, and so for me, it feels very personal. Right. Um, my experience at Occidental was also made possible through philanthropy in the form of an endowed scholarship. And so while, um, I do know a thing or two about relationships. It's also so true to the occidental experience. We are a small liberal arts college, 2000 students on campus for whom relationships matter the most.

Um, being in a small class size, having access to undergraduate research opportunities, it is what makes the occidental so special, so transformational, and really what prepares our alumni for meaningful careers in industry, in government and public service, um, once they depart our campus. And so for us, it really comes back to that, that theme as well. And I look around my network and I know that to be so true, but as an institution, we sort of had lost touch with that, and we needed to come back to our alumni, to our community, to build those relationships more deeply. Um, and for us, that ties to our strategic vision, um, for how we're able to plan for the future. And through relationships, we can build trust. And from trust, we can meet our philanthropic goals.

Speaker I   00:39:02

Thank you both for sharing that. Natalie, you've been talking a lot about operationalizing data. What does that mean and how are you bringing that to life at Oxy?

Speaker D   00:39:11

Yeah, so, uh, my first job also was at Oxy, a, um, long time ago. Um, and I worked in the admissions office. And anyone who work in admissions knows a lot about data. Um, gpas, test scores, little less. So the test scores these days, but raw numbers. Right. But we also need to know the person, the qualitative aspects of who we are learning about in this admissions process and how do we support them, recruit them, engage with them. And, um, a mentor once talked a lot about the logic and the soul of data. And I think that is so true today in advancement as well. We're looking at someone's giving history, we're looking at, um, these pieces of information about who they are in their philanthropic capacity, for example. But we also need to know about them as people. And, um, for us, it really comes back to finding this balance of these two things. And so as we moved onto the salesforce platform over the last several months, we now have access to information that has literally had literally been locked in server closets for 35 years. Um, where we can now see it, we can understand it, and hopefully, um, take steps towards, uh, making more actionable insights to what we can do with that information in meaningful ways, um, to engage with our alumni, to engage with our constituents, um, and drive our philanthropic goals.

Speaker I   00:40:25

I'm glad you're not in a data dark hole, I think, as you put it anymore, which is really great. Katie, you also implemented Salesforce very recently. Um, in fact, uh, fun fact, we met Katie. A day after they had moved their data into salesforce, she was as cool as a cucumber. It's like nothing had ever happened. It was all seamless. And you oversee all areas of institutional advancement as well. So as you think about those areas, how is Salesforce really coming alongside and helping you with, uh, your priorities there?

Well, we're very focused and I'm very focused on, of course, growing contributed revenue. Have any of you heard that maybe at your institutions as well, demand for more fundraising? It's very top of mind. And so one of the ways that we're working on that is to actually have more reporting, do more focused portfolio management. I'm in the process of working with our entire frontline fundraising team as well, to better define their portfolios. And we're doing that and managing it through our pipelines of support. I also am working on that reporting that we need to do on a regular basis. Back to our donors, back to our trustees, my boss, all of that. Uh, I also think that we really realized that we needed to have one platform and that platform was going to be education cloud and also the marketing cloud account engagement. And so we wanted to have that to better utilize the ways that we can connect. And as I said, um, going back to that relationship part, how we do have efficiencies realized with knowing who to spend our time with personally, but also how to have more frequent communication out to our donors. So that's an incredibly important thing we're very focused on right now, in addition to the implementation.

Speaker I   00:42:07

That's great. And I, you know, we saw just now, uh, education cloud is what you're using there, and we saw a lot of new innovation just now. Natalie, I'm just curious, kind of what you're thinking about as you saw what Margot shared, what Vanessa shared, what are you thinking about these new capabilities and how do you think it's really going to make a difference at Occidental?

Speaker D   00:42:25

Yeah. So similar to what CalArts is doing around prospect management, pipeline management, with um, with. We're actually going to leverage CRM analytics for that to allow us to really understand how do we make stride, take strides with our 30,000 alumni, but also identify the top 300 or 500 individuals to really deep, deepen relationships with philanthropically now. And we're also thinking about the mentorship program, which we're very excited to launch on the platform in the spring, which is a mentorship program for our emerging alumni with more seasoned alumni. Again, kind of tying back to that liberal arts degree, what do I do with that and how does that prepare me for my career 1020 years down the line and really trying to build those connections with our alums, using the platform to identify the right mentees, the right mentors, um, with our partners across campus. And the third thing is also using marketing cloud account engagement for us to provide more meaningful philanthropic journeys for our donors, um, being able to deliver stewardship communications more timely, um, and to reengage donors within the cycle, um, within the annual life cycle of giving, rather than just asking for a donation once in the fall and then talk to you again nine months from now, but really knowing that our current donors are our best donors and how do we engage them in more meaningful ways as well. Using marketing cloud Katie, how about you?

Just as you think about kind of moving forward, think about the future, how do you see Salesforce helping to accomplish what you want to do over the next year and beyond? And another part of the question as well, what will be the role of data and AI in your mind in helping to meet, uh, lots of the goals that you have right now? Sure.

Speaker F   00:44:06

Well, one of the things that we do want to do more of our behavioral studies and of course, engagement scores, these are all kind of nerdy ways of just saying the closer people are to you, the more likely they are to give you a lot of money. So that's what we focus on. Uh, but I do think that with AI, if I have my crystal ball, what I think is going to happen is the fact that it will help us to just be a little more efficient so that we can actually deploy more of the in person relationship advancing that we like to do. So imagine if we can start to use some of the AI tools that we've seen today, how that could free up some time for us to actually go out and be more with people on a regular basis. Because again, having done this for so many years, we need to know that people still give money to individuals when they go to ask them in person. And when we are asking for big, large transformational gifts, that is how the work is done. So I think that it will help us to be more efficient and, uh, then also hopefully have more touch points with our donors.

Speaker I   00:45:07

Fantastic. Well, I wish we had more time, but thank you both for sharing your, uh, experiences, those words of wisdom as well. I look forward to seeing what happens next on your journey with Salesforce. Ah, as a partner. Uh, but for now, I'm going to hand it back to my friend and colleague, Brad Schleicher.

Speaker A   00:45:26

All right, thank you all. Great customer stories. Uh, it's great to hear from all of you. Um, we have a couple more things, folks. Uh, so first, good news. Dreamforce is just getting started. Started. Um, we have curated a great list of sessions over the next couple of days. Education sessions, of course. Um, and agenda builder is going to be your best friend for that. But I want to point out two particular sessions that are taking place tomorrow afternoon in the w hotel. That's our home base for global public sector as well. I see the cameras out. That's good. 1245 building an SIS for education, unity environmental is going to be hosting that session. They have a session a little bit later today. I heard the claps. That's Kathy over there.

Speaker E   00:46:10

Right?

Speaker A   00:46:10

Okay. Um, they're hosting a session later in the day, but the roundtable is going to go into a little bit more depth there. So check that session out. And we also talked about data strategy for AI. We have Maryville University, Devry University, Arizona State University going to be hosting that at 245 again in the w, second floor. Make sure you check out those sessions and get there early. Not a huge room, so please do that as well. And, uh, we're going to be in the campground just the same. So, folks, uh, come visit us. Uh, any questions that you have, we would love to see you see, uh, some of the recent education innovation as well. And before you flip the slide, who here is familiar with education summit? Most of you. Most of you. Okay, good. For the uninitiated, we've been hosting an event for last twelve years. It is basically a mini education dreamforce. It's sessions, it's workshops, it's everything that you would want out of an education specific salesforce event. And it is my distinct pleasure and honor to announce we're bringing it back for a 13th year, folks. So please join us, uh, March 11 through 13th next year in Chicago, Illinois. We can't wait to see you there. We're going to have some more information very, very soon, so please stay tuned. But again, we can't wait to see you there. We can't wait to plan this and, uh, have this event, folks. That's everything we have for you today. Thank you so much for joining us. Have a great dreamforce. We'll see you next time.