

# TITAN for Education Teams

## Run Enrollment, Consent & Student Workflows in Salesforce

Titan runs student workflows directly within your CRM, giving admissions and finance teams clear visibility, structured approvals, and faster enrollment completion.

## Education Pain Points

- ⊗ Application documents arrive through email threads and disconnected portals
- ⊗ Consent forms and policy acknowledgments are stored outside Salesforce
- ⊗ Financial aid approvals move across inboxes and attachments
- ⊗ Students and families cannot see the application or enrollment status
- ⊗ Reporting relies on spreadsheets instead of real-time data



**Result: Slower enrollment cycles, increased administrative workload, and compliance exposure**

## How Titan Works Inside Salesforce

### Guided Application & Intake

Students complete secure application and intake flows through branded portals. Conditional logic ensures transcripts, identification, and financial documents are submitted before completion.

Submissions write directly to the correct student record in Salesforce.

### Enrollment Documents & Consent

Enrollment agreements, consent acknowledgments, and financial aid letters are generated from Salesforce data.

Documents are routed for internal review, sent for eSignature, and stored on the student record. Every version and signature remains visible in Salesforce.



### Admissions & Financial Aid Approvals

Applications, financial aid packages, and exception requests follow defined approval paths across admissions and finance teams.

Decisions are recorded in Salesforce with clear ownership and timestamps. Students and staff can monitor enrollment progress without email follow-ups.



### Without Titan

- External application forms
- Manual document handling
- Consent stored outside Salesforce
- Email-based status updates
- Fragmented reporting



### With Titan

- Applications submitted in Salesforce
- Documents generated from student records
- Consent signed in Salesforce
- Real-time status visibility
- Full process traceability

## Outcomes for Education Institutions

### ✓ Faster Enrollment Completion

Applications, documents, approvals, and signing move forward in a single process.

### ✓ Higher Application Completion Rates

Students receive clear guidance on required documents and next steps.

### ✓ Lower Administrative Workload

Admissions teams spend less time coordinating documents and approvals.

### ✓ Audit-Ready Governance

Approvals, documents, and signatures remain tied to Salesforce records.



## The Bottom Line

**Titan runs admissions workflows, enrollment documents, approvals, and signatures directly on Salesforce.**

Education teams gain clear operational control without adding new systems. Salesforce remains the system of record. Titan runs the workflows that move students from application to enrollment.