Salesforce History and Timeline

Since June (end of Foundation Partners contract) ***Sara scheduled weekly meetings with Distance, IT and Student Services. A lot of progress made…***

- ISRS nightly download of daily online and on campus student applications
- Generates a report of campus and online daily submitted applications with status (complete, pending, etc.)
- Streamlined communication process to students by creating templates with consistent verbiage for day 0 email, acceptance letters, and additional documentation required
- Work in progress - Text and email students admission communications
- Prospects entered into Salesforce and then contacted by recruiters
- Work in progress – International Student Communication
- Adding additional communication letters

7/22/25

Update from Chad: Yes, I'm able to track a wide range of prospect data, including:

- Request for information inquiries (both general and program-specific)
- Athletics website inquiries
- Campus visit requests
- Website traffic and engagement metrics
- Digital advertising performance
- Once the virtual tour is launched, I'll also be able to track both traffic and inquiry data related to that platform.

The only area where I don't have direct access is application data. All of our marketing systems are set up to capture and track the digital interactions listed above. One gap may still be our human-driven interactions such as walk-ins, phone calls, and other offline touchpoints. (Note: recruiter human interaction at fairs, etc. is now captured properly.) To ensure we're capturing the full picture, it's important that all of those leads are consistently entered into Salesforce.
Karen has been entering all prospects into Salesforce and then Amanda and Alyssa contact them. Mindy will be trained to enter them into Salesforce as well.

6/24/25

Chad/Kristi reduced mailable prospects list down 18,488 so we are below 20k limit as a quick fix. Will continue to work on so we are within license limit.

6/3/25

Foundation Partners contract ended.

- Foundation Partners 47 items completed and 20 items still on the to-do list.
- Invoice from Foundation Partners $8,050.00 1/1/25-3/31/25 40.25 hours – 7/27/25
- Invoice from Foundation Partner $11,150.00 4/1/25-6/30/25 55.75 hours – 7/27/25
- Invoice from Foundation Partners $8,850.00 10/1/25-12/31/24 44.25 hours 4/10/25

6/2/25

Tiffany Brunko from Distance: Day 0 Emails update: Foundation Partners got the button working and she sent emails to all campus students that we have processed from 5/29/25 to current so we should be caught up. They will process from here on out.

5/14/25

Added Distance Mn users to our Salesforce

5/13/25

Update from Chad:

Recruiting Team/Lead Generation (formerly Pardot)

Salesforce's marketing lead generation elements have been operational since launch. No support or work was needed for automation, communications, or reporting. The recruiters confirmed that the updated ISRS importing is working well on their end, and the data is useful. Alyssa will begin full-scale training (from me and Amanda) in late May after commencement. We are working on developing a departmental SOP for how the recruiters will utilize Salesforce for recruiting communications, actions, and tracking. This will be the building block for an eventual full-scale college communications plan that will be developed as part of our college SEM planning.

Last week, Gayle and I discussed finalizing details for adding a field for internal notes that only the recruiting team can view. I believe this is now set up, but may require a brief training session with the recruiters or a simple email with instructions on where to find and how to use this feature.

More Logical/Custom RFI Forms

Gayle and I also talked about my request for a more logical/custom solution for RFI form development. Gayle found an add-on tool that could be the perfect solution for our needs—thank you, Gayle! It's an add-on tool for our current online form tool used on our public-facing website. It does require integration into our website, so I have our web dev team conducting QA testing of this add-on tool on our test site/server. This will be integrated in early summer after QA testing is complete. I am well-versed in this form tool and will not require training.

Branded Letter Templates

As I mentioned at our last meeting, I will start coding custom-branded letter templates for our admissions letters after commencement. Gayle has already shown me where to build these templates. In the short term, someone can create these letters in Salesforce using our logo in the header just to get them up and running. I can build in the more polished branded templates later on without delaying their use or disrupting the process.

Automated New Lead Assignments to Recruiters

I still need to provide Gayle with the final recruiter roster assignment list for automatically assigning all new leads to recruiters based on campus and/or major interest. This is a new "nice to have" request feature that Gayle and I discussed last week.

Mogli (Texting)

Implementing Mogli is another post-commencement project on my list. I have the build instructions I need from Mogli; I just need to implement and test it on our website.

Future Request for Assistance

Lastly, I have a new request: I would like to create an automated report of prospect leads who are not admitted. This report should be sent only to the recruiters and myself. The recruiting team will handle communicating with and nudging leads to apply. I may need help setting up a report that pulls app status data.

5/9/25

Foundation Partners incorrectly sent emails to accepted students while testing the system.

4/29/25

Letter templates created for Apsona and reports that generate each of the letters.

4/29/25

Where are we at with Recruitment and Admissions in Salesforce?

- Foundation Partners Perspective: The recruitment functionality in Salesforce was finished a few months ago, and Gayle has met with Sara, Chad, and Amanda about how to use it. Besides a few Apsona letters, we do not know of anything the Northland recruitment team needs to be using Salesforce. However, it seems like not everyone is using the Recruitment and Admissions functionality yet, so we are not sure how to proceed.
- Chad Sperling: We are currently in a good position with marketing lead gen and recruiting using Salesforce. Our marketing lead generation efforts (excluding Mogli) have been operational since the inception of Salesforce. I am actively collaborating with Mogli and my team to address the issues we are experiencing in this area. Amanda has been one of our primary power users of Salesforce since she started and is very familiar with the product. She and Alyssa (the new recruiter) are working together to determine the best way to utilize Salesforce for recruiting purposes. The adjustments in these areas have made the product better. As of now, there are no concerns or issues on the recruiting side that have popped up yet.

Foundation Partners, LLC

Where are we at with Recruitment and Admissions in Salesforce?

- Sara Johnson: Priority of creating new email communications like those sent by Distance Minnesota. Unclear to Foundation Partners which emails are needed and who is responsible for creating them.
- Stacey Hron: Apsona, Forwarded 5 acceptance letter templates to Foundation Partners to be created in Salesforce. Desiring to move to the next phase with Student Success.
- Amanda: Logging in regularly, sending emails to prospective students. 284 emails in last 30 days. Sent 20 Mogli messages in last 30 days.
- Alyssa: New, no Salesforce login activity in last 4 weeks.

Foundation Partners, LLC

4/24/25

Foundation Partners – started working on letters.

4/22/25

Foundation Partners updated navigation functionality

4/21/25

meeting with Kristi K from Distance and Sarah G from Alex to get additional info on Apsona and configuration to create similar process as Alex/Distance.

4/17/25

Project updates
Foundation Partners: Trial version of Apsona setup. Requested quote for licenses
Answers to your questions are below:

1. When will we be ready to start training for Recruitment staff?
   - The recruitment functionality in Salesforce was finished a few months ago, and Gayle has met with Sara, Chad, and Amanda about how to use it. From our perspective the Northland recruitment team should be using Salesforce for recruitment and nothing else is needed on this. If that is incorrect and you need additional configuration or training please let us know, we are glad to help in any way to help your team use Salesforce successfully for recruitment work.

2. What is next step for Apsona conversation?
   - There are three next steps on this:
     - Let us know what letters you want produce and send us copies of them in Word
     - Give us approval to install the Apsona 30 day trial
     - Give us approval to start building these letters in Apsona/Salesforce for you.

3. When can we begin conversations about Student Success?
   - We can start these conversations now. Our understanding is that Sara wanted the letters built out before we started on Student Success, but we are fine moving forward with both the recruitment letters and Student Success conversations at the same time.

Chad: I can provide an update on point #1. We are currently in a good position with marketing lead gen and recruiting using Salesforce. Our marketing lead generation efforts (excluding Mogli) have been operational since the inception of Salesforce. I am actively collaborating with Mogli and my team to address the issues we are experiencing in this area. Amanda has been one of our primary power users of Salesforce since she started and is very familiar with the product. She and Alyssa (the new recruiter) are working together to determine the best way to utilize Salesforce for recruiting purposes. The adjustments in these areas have made the product better. As of now, there are no concerns or issues on the recruiting side that have popped up yet. Thanks

4/15/25

Update from Sara: I reviewed my Outlook calendar and didn't see any invitations to meetings with Foundation Partners prior to engaging with them at the end of February, and below is a list of the meetings I scheduled along with the attendees.

My assumption is that Stephanie had been in contact with them during November and December, and that the invoice hours reflect those earlier meetings as well as the behind-the-scenes updates that Dave Dumbeck was working on during that time.

I think it would be helpful for us to meet with Foundation Partners to get a clear understanding of where things currently stand. I'm feeling a bit out of the loop in this process, and when Chad and I met with the Distance Minnesota staff on March 26th, they shared that it took them 8–10 months to get things fully off the ground when they began.

- 1/7/2025 Additional meeting
- 2/24/2025- Gayle Grant, Chad, Bree, Mindy, Amanda Kinney, Alyssa Montgomery, Amanda Hoglo
- 2/26/2025- Gayle, Chad, Sara
- 3/6/2025- Gayle, Chad, Sara
- 3/24/2025- Gayle, Chad, Sara
- 3/26/2025- Chad, Sara, Bree, Mindy, Melissa Schmelz, Kristi Karels
- 4/30/2025 Additional meeting
- 05/14/2025 Additional meeting
- 05/19/2025 Additional meeting

4/10/25

Invoiced for 44.25 hours $8,850.00 10/1/24-12/31/2024

3/4/25

Received scripts from MState and now running from our servers.

2/27/25

Foundation Partners project update:

I believe we have the Admissions data in a good place and they should be able to transition confidently to Salesforce as their first stop and stop using the spreadsheets. We might need to do a bit of training regarding list views but not a big deal.

We worked with Dave Dumbeck recently for Integrations regarding the Applicant data.

Updates to the Integration for Application details getting the mapping to the Application object versus Contact object. We also cleaned up some old fields that are now handled differently.

We got the phone number mapping updated: Phone number re-mapped and mobile phone added to the mapping. This allows the Mogli field to be populated so texting can happen.

We added integration for the Enrollment Histories so Recruitment can see all schools that a student attended and whether transcripts have been received etc. This was one of the things they were tracking on their spreadsheets.

Naturally all these updates are reliant on the integration timing.

2/18/25

Dave/Scott resolved application integration errors

2/11/25

Dave/Scott resolved integration errors. Reviewed bulk import logs.

2/6/25

Added admissions team to streamline application process (Sara, Bree, Amanda, Mindy)

2/4/25

Foundation Partners and MState programming progress regarding integration. Met with Recruitment regarding leads and what data they use.

1/28/25

Programming contract with MSTATE for ISRS-Salesforce integration up to 20 hours @ $75/hr = $1,500

1/15/25

Salesforce annual renewal $38152.00 1/16/25

12/16/24

Foundation Partners - Our primary focus has been to resolve issues on the Leads object and with Account Engagement, and we have completed over 20 configuration and data cleanup items. Below is an overview of the items that have been resolved so far, you can view a full list at https://northlandcommunityandtechnicalcoll.lightning.force.com/lightning/o/Enhancements__c/list?filterName=All_Closed

- Accounts - imported a full file of high schools with the ACT code and addresses.
- Updated the Lead page layout to show fields that are captured on the RFI form.
    - Required fields from RFI are now required for new leads.
- Removed fields that are not being used from the Lead page layout to eliminate clutter.
- Populated the Lead Source field with values that were in the lead source text field and removed that redundant field.
- Resolved Sync errors in Account Engagement, 263 - deleted records, picklist value mismatch, intended major mismatch, family email address errors.
- Added missing Lead and Contact records to Account Engagement, 3781
- Full Account Engagement sync was performed. Running smoothly, no new errors.
- Servio created a flow that was deleting duplicate Lead records instead of merging them, we inactivated this incorrect automation.
- Created a field on Lead object to store the high school graduation year.
- Created fields to capture the last contact date. One each for call, email, text and mailing.
    - Populated activity type, for tracking of last activity.
    - Create rollups to automatically populate these fields with values from Task records
- Populated missing Intended Major values
- Populated missing Campus values
- Exported Notes and Imported as Tasks with all details. Notes is an outdated feature and not reportable and is not viewable by other users. Tasks can be viewed by all users to see interactions with prospective students.

2) Gayle had a call today with Recruitment personnel (Chad, Amanda and Alyssa) to show them the work done on the Leads and to understand their processes in regards to contacts/applicants. Based on this we are now beginning work to fix issues with the Contact object and creating reports that will replace the spreadsheets the recruiters are currently using. After correcting these issues we will schedule another meeting with them to review updates and do training.

3) The data integration with ISRS is missing needed values, I will contact the M-State team who built your integration

11/12/24

Contract sent to Foundation Partner and work begins on configuration issues.

10/30/24

PO created for $20,000 for bucket of 100 hours of support and training. SOW Configuration of recruitment, student success, and marketing functionality in Salesforce. Salesforce training for Northland Staff.

What We Heard From You During Our Conversation

- You have Salesforce but are not really using it much now (with the exception of Marketing is using Account Engagement/Pardot).
- Chad is the only person from the implementation team still at the college, the result is that your team doesn't really know what the system can do or how it works.
- Student Recruitment is currently using spreadsheets to track work.
- Using the system to serve current students is a high priority, this will replace manual processes.
- The technical team at M-State built your integration with ISRS but not sure the status of this work.
- You need someone who knows Salesforce and Higher Education (specifically how a Minnesota State college works) who can answer questions for you and provide help when issues arise.
- You want to get started on this work as soon as possible and begin using it by the beginning of Spring semester in January.

Items We Saw in Our Evaluation of Your Salesforce Org that need to be addressed - Recruitment

- Leads
  - Page layout issues – Compact layout does not display most important fields, redundant fields ("Program", Major ID, Degree vs Intended Major), many irrelevant fields on layout (web links and website, Tech ID and Star ID, etc), layout organization unclear, HS Grad Year and High School fields don't exist, Mogli component not there, Account Engagement fields and component not there
  - Over 200 "Anonymous Leads"
  - Lead Assignment rules are not being triggered so records not assigned to correct staff member
  - Lead Assignment uses only Queues, many Queues do not an active staff members assigned to them
  - Nearly 4500 records do not have Term value
  - Many blank values for "Lead Source"
  - Lead Conversion process is not automated when a person applies/Contact exists
- Contacts
  - Page layout issues – no visibility to related objects, Mogli component not there, Account Engagement fields and component not displaying, etc.
  - Record Type issues (duplicate values, categories are not mutually exclusive), no rollup summaries for registered terms, holds, application terms, cohorts)
  - Account model issues (mix of Administrative and Household)
  - Application data is sparse/unusable

Items We Saw in our Evaluation of Your Salesforce Org that need to be addressed – Student Success and Marketing

- Accounts
  - High School records do not have a Type value, no CEEB code, no address, etc.
  - Not all High Schools have Account records
  - Record Type issues
- Registration Status object and data questions
- No Term records
- Only one Student Success Template exists
- Student Success Plans don't exist
- Student Success portal does not have any data, no available portal licenses, looks like no user has ever been inactivated
- Many users are System Administrators
- Account Engagement
  - Over limit for number of Prospects
  - 22 records in MCAE that are not in Salesforce (sync issues)

What We Saw in our Evaluation of Your Salesforce Org – Recommended Functionality Does Not Exist

- No Campus Visit module
- No custom Duplicate Rules
- Engagement Programs for communication with applicants and current students do not exist in Account Engagement
- Automation of personal interactions/phone call tasks does not exist
- Document/Letter Generation functionality does not exist
  - Here is a link to an Apsona letter generation demo we did for Minnesota State schools, it starts at the 28:30 mark of this video

10/24/24

Created user account for Foundation Partners to evaluate our environment and provide cost proposal.

10/24/24

Reached out to Salesforce for setup help. Referred to Foundation Partners. They have helped ***11 other campuses in MN State with Salesforce setup***. Initial meeting to discuss clean up and refresh to get up and running. (meeting included: Salesforce, Foundation Partners, Stephanie LeDuc, Sara Johnson, Heidi Kippenhan, Chad Sperling, Bree Dronen, Mindy Rist and Amanda Hoglo)

10/11/24

IT given ADMIN accounts to Salesforce. Created a group to push out a Desktop shortcut to Salesforce for all members. Also enabled SSO so users could login with their starID username and password.

10/3/24

Follow up from Chad…

The side of Salesforce that needs the absolute most attention is the student success side (admissions). The information and contacts I've provided are specifically geared towards that aspect of our work. The front end, including lead generation, drip campaigns, prospect communication, texting, and reporting, has been functioning well from the start and doesn't require immediate attention. It has great potential for enhancements, but that work will fall under the target recruitment/marketing group. I'm aiming for that to be that team's next big project, which will come after we have the admissions side of Salesforce up and running smoothly.

1. Originally, I received the requests and communicated with folks requesting accounts. Jeff took over the communications, but I still managed accounts (adding/removing).
2. I create accounts (Jeff would communicate with requestors.)
3. I had heard this happening, but I never heard who was having these issues. Some of this was due to how Jeff was attempting to set up accounts. Sometimes, this is a simple user error, such as not using the proper login URL. Other times, it's a new employee onboarding issue that only SF support can fix.
4. This I don't know. I wasn't on that work group team. (Brian H led that admin group.) The contacts I provide below should be able to answer that question though.
5. It's browser-based. Here is the URL I have folks bookmark: **https://northlandcommunityandtechnicalcoll.my.salesforce.com/**
6. See attached. Again, these are focused on the Student Success side of SF.
7. See below. I know they've had retirements and turnover, but these were my Student Success side of SF contacts.

bobby.kurbat@servioconsulting.com
amy.brown@servioconsulting.com
chris.collins@servioconsulting.com
kristi.brown@servioconsulting.com

From: Hron, Stacey L <stacey.hron@northlandcollege.edu>
Sent: Thursday, October 3, 2024 9:29 AM
To: Sperling, Chad A <chad.sperling@northlandcollege.edu>
Cc: LeDuc, Stephanie L <stephanie.leduc@northlandcollege.edu>
Subject: Salesforce

Hi Chad, in our Salesforce breakout session yesterday we came up with some questions. Do you have answers to any of the below?

1. Who do people contact if they want access to the system?
2. How are users created and who creates them?
3. Some people have user accounts but can not log in…who do we contact?
4. How many user licenses do we have?
5. How do you access Salesforce…is something installed, link, etc?
6. Where are the training materials we were provided?
7. Do you have a contact at Salesforce?

10/2/24

SEM Salesforce breakout session. Users in the group reported they could not login and didn't know how to access Salesforce.