

2025-26 Strategic Enrollment Priority Project

MEETING INFORMATION

| | | | |
|------------------|---|-----------------|------------|
| TITLE | Salesforce | | |
| DATE | Tuesday, February 10 th | TIME | 9:00am |
| LOCATION | Zoom | RECORDER | Mindy Rist |
| CO-CHAIRS | Sara Johnson | | |
| MEMBERS | Amanda Hoglo, Mary B Lenz, Tiffany A Brunko, Stephanie DenHartog, Melissa S Schmelz, Kristi A Karels, Shad T Gangl, Scott A Foss, Stacey L Hron, Chad A Sperling, Bree Dronen, Mindy Rist, Sarah M Dorn, Lisa Gunderson, Joseph D Agbeko, Amanda Kinney, Alyssa J Montgomery, Katlyn Tamaalii | | |

TYPE: I = Info, D = Discussion, A = Action

AGENDA

| TYPE | AGENDA ITEM | ACTION TAKEN |
|------|---------------------|---|
| I | Check-In | |
| D | Workgroup Updates | |
| I/D | Information Sharing | We are waiting for system office to let us know which CRM will be used. |
| I | Check-Out | |

Action Item Status

| Action Item | Brief Update | Date | Other Information | Date Completed |
|--------------------------------|---|---------|-------------------|----------------|
| Completing Direct Admit letter | Bree will work on adding the suggested additions and updates to the letter. | 1/27/26 | | 2/10/2026 |
| Reports | Looked at report filtered by cohort code and discussed which additional filters to add. Bree will continue to edit. | 1/27/26 | | 1/27/2026 |

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|------------------------------|---|---------|--|---------|
| Reports | Bree is reaching out to Tiffany & Mary to see if there is a report that can be cloned for students that have been moved to accepted. | 2/10/26 | | |
| PSEO | PSEO is not using Salesforce yet. Sara sent an email to Kristi Karels on 2/10/2026 to request a meeting. | 2/10/26 | | |
| Salesforce List sent by Chad | Discussed the report containing student information. Need to confirm with Chad who the report will be sent to and ask him to revise it, so it includes only the student's name, program, email, and start term. | 2/10/26 | | |
| Marketing | Amanda will show how Marketing is using Salesforce | 1/27/26 | Amanda gave a demo of how Marketing uses Salesforce. They also use spreadsheets. Email via Salesforce for tracking. Responses come in via Outlook. | 2/10/26 |

NEXT MEETING: Tuesday, February 24th at 9:00 a.m. on Zoom