2025-26 Strategic Enrollment Priority Project

MEETING INFORMATION			
TITLE	Salesforce		
DATE	Tuesday, February 24th	**TIME**	9:00am
LOCATION	Zoom	**RECORDER**	Sara Johnson
CO-CHAIRS	Sara Johnson		
MEMBERS	Present: Sara Johnson, Mary B Lenz, Tiffany A Brunko, Kristi A Karels, Shad T Gangl, Scott A Foss, Chad A Sperling, Bree Dronen, Sarah M Dorn, Joseph D Agbeko, Amanda Kinney, Alyssa J Montgomery, Katlyn Tamaalii Absent: Amanda Hoglo, Stephanie DenHartog, Melissa S Schmelz, Stacey L Hron, Mindy Rist, Lisa Gunderson		

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

AGENDA		
TYPE	**AGENDA ITEM**	**ACTION TAKEN**
I	**Check-In**	
D	**Workgroup Updates**	The meeting focused on addressing issues with Salesforce modules, specifically the Education Architecture (EDA) and Student Success Hub, where Shad discovered missing permission sets that could impact functionality. Bree reported a problem with the Day Zero email not pulling external transcripts from ISRS, leading to a detailed discussion between Scott, Shad, and Kristi about data integration and table structures in the replicated database. Chad provided an update on modified reports sent to faculty. The team also discussed permissions for the new Interim Director of Recruitment and Admissions, Alyssa Montgomery.
I/D	**Information Sharing**	System Office will choose CRM mid-March
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
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	2/24/2026 Bree working on it	
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	The PSEO report, letter template, and dedicated PSEO email address have been completed. PSEO initiatives are currently on hold pending the system office's decision on a CRM platform, as this selection will impact on multiple components, including reports, letters, and branding templates.	2/24/26
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		2/11/2026

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
Review integration scripts and determine where external transcript data resides in ISRS/REPL to update scripts for Salesforce integration.	Scott worked with Katlyn and Shad, updated scripts and everything should be running smoothly.	2/24/2026		2/24/2026

NEXT MEETING: Tuesday, March 10th at 9:00 a.m. on Zoom