

## 2025-26 Strategic Enrollment Priority Project

### MEETING INFORMATION

<b>TITLE</b>	Salesforce		
<b>DATE</b>	Wed, March 18th, 2026	<b>TIME</b>	11:00am
<b>LOCATION</b>	Zoom	<b>RECORDER</b>	Mindy Rist
<b>CO-CHAIRS</b>	Sara Johnson		
<b>MEMBERS</b>	<p><b>Present:</b> Sara Johnson, Mary B Lenz, Kristi A Karels, Shad T Gangl, Scott Foss, Mindy Rist, Sarah Dorn, Amanda Hoglo, Tiffany Brunko, Melissa Schmelz, Amanda Kinney, Alyssa Montgomery, Chad Sperling</p> <p><b>Absent:</b> Stacey L Hron, Katlyn Tamaalii, Stephanie DenHartog, Bree Dronen, Lisa Gunderson, Joseph D Agbeko</p>		

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

### AGENDA

TYPE	AGENDA ITEM	ACTION TAKEN
I	Check-In	
D	Workgroup Updates	CRM Integrations for Admissions Sheet discussed and filled out. Added what we are currently using and our wish list.
I/D	Information Sharing	Discussed end dating vs canceling applications.
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	1/27/26		1/27/2026

	which additional filters to add. Bree will continue to edit.			
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.	2/10/26

			Responses come in via Outlook.	
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
Education History	Scott & Bree working on tables for education history, as it is still pulling Minn State institutions. Will need to connect with Bree & with Alex Tech.	3/12/2026	Scott & Shad updated so Minn State schools don't show as needing transcripts	3/12/2026
Security	Scott & Shad looking into security settings and permissions in Salesforce	3/12/2026		3/12/2026
Closing/Canceling apps	Alyssa reaching out to Sean Olson in the system office to set up a meeting with admissions. Admissions will meet with Tiffany as well.	3/18/2026		

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