

## 2025-26 Strategic Enrollment Priority Project

### MEETING INFORMATION

<b>TITLE</b>	Salesforce		
<b>DATE</b>	Tuesday, March 24 <sup>h</sup> 2026	<b>TIME</b>	9:00am
<b>LOCATION</b>	Zoom	<b>RECORDER</b>	Scott Foss
<b>CO-CHAIRS</b>	Sara Johnson		
<b>MEMBERS</b>	<p><b>Present:</b> Tiffany A Brunko, Kristi A Karels, Shad T Gangl, Scott A Foss, Amanda Kinney, Alyssa J Montgomery, Bree Dronen, Mary B Lenz  <b>Absent:</b> Amanda Hoglo, Stephanie DenHartog, Melissa S Schmelz, Chad A Sperling, Lisa Gunderson, Joseph D Agbeko, Stacey L Hron, Mindy Rist, Sarah M Dorn, Katlyn Tamaalii</p>		

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

### AGENDA

TYPE	AGENDA ITEM	ACTION TAKEN
I	Check-In	
D	Workgroup Updates	Reviewed Day 0 letter to ensure everything is running smoothly.
I/D	Information Sharing	New CRM was not announced last week. Still in negotiations.
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

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		
Security	Scott & Shad looking into security settings and permissions in Salesforce	3/12/2026	<p>Added MinnState Institution codes within the "Accounts" object and added a new custom field on the Education History object, and setup a formula to populate that new field with the MinnState Institution ID if it existed.</p> <p>Then they modified DLRS that was calculating the "Transcripts Needed for Acceptance Comm" field (which listed the institutions we need an Official transcript from) and to skip any of the MinnState Institutions.</p> <p>Then ran a full recalculation for that DLRS rollup entry, so it could remove any of the MinnState institutions from the "Transcripts Needed for Acceptance Comm" field of contacts.</p> <p>The Day 0 mail merge should no longer include MinnState Institutions for needing official transcripts and it should list the other Institutions if we need an official transcript.</p>	3/12/2024

**NEXT MEETING: Tuesday, April 7<sup>th</sup> at 9:00 a.m. on Zoom**