

2025-26 Strategic Enrollment Priority Project

MEETING INFORMATION

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|------------------|---|-----------------|------------|
| TITLE | Salesforce | | |
| DATE | Tuesday, April 7, 2026 | TIME | 9:00am |
| LOCATION | Zoom | RECORDER | Mindy Rist |
| CO-CHAIRS | Sara Johnson | | |
| MEMBERS | <p>Present: Sara Johnson, Mary B Lenz, Shad T Gangl, Scott Foss, Mindy Rist, Amanda Hoglo, Tiffany Brunko, Amanda Kinney, Alyssa Montgomery, Chad Sperling, Lisa Gunderson, Joseph D Agbeko</p> <p>Absent: Kristi A Karels, Sarah Dorn, Melissa Schmelz, Stacey L Hron, Katlyn Tamaalii, Stephanie DenHartog, Bree Dronen</p> | | |

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

AGENDA

| TYPE | AGENDA ITEM | ACTION TAKEN |
|------|---------------------|--|
| I | Check-In | |
| D | Workgroup Updates | Checked in with items that are still not completed. Per Bree, no hiccups with Day Zero emails. |
| I/D | Information Sharing | Still waiting for announcement of chosen CRM. |
| 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 | Checking with Bree to see if she is now using reports. | |
| 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 |

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| 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 | Some advisors have already sent to admissions to close. Checking on current status. | |
| Ability to text from Salesforce | Chad, Shad and Scott will set up a meeting with Mogli. Need to check into adding opt in/opt out. Shad has already added Opt-out Keywords. | 4/7/2026 | | |

NEXT MEETING: Tuesday, April 21st at 9:00 a.m. on Zoom