

2025-26 Strategic Enrollment Priority Project

MEETING INFORMATION

TITLE	Salesforce		
DATE	Tuesday, April 21, 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, Joseph D Agbeko, Bree Dronen, Kristi A Karels,</p> <p>Absent: Sarah Dorn, Melissa Schmelz, Stacey L Hron, Katlyn Tamaalii, Stephanie DenHartog, Chad Sperling, Lisa Gunderson</p>		

NEXT MEETING: Tuesday, May 5th at 9:00 a.m. on Zoom

Action Item Status

Action Item	Brief Update	Date	Other Information	Date Completed
12Salesforce reports	Bree is working with Scott & Shad to get reports set up. Major listed first gets pulled in salesforce. Bree is sending screenshot examples. Small group to get together to look at coding.	4/21/26	Still waiting for announcement of chosen CRM. May be pushed out to May	
11Ability 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	4/21/26 Still no update. Meeting was canceled. Chad is working to reschedule.	
10Closing/Canceling apps	Alyssa reaching out to Sean Olson in the system office to set up a meeting with	3/18/2026	2/21/26 Work in progress	

	admissions. Admissions will meet with Tiffany as well.			
9Security	Scott & Shad looking into security settings and permissions in Salesforce	3/12/2026		3/12/2026
8Education 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
7Review 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
6Marketing	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
5Salesforce 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
4PSEO	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	2/24/26



			multiple components, including reports, letters, and branding templates.	
3Reports	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	4/21/26 Bree, Scott & Shad are working with Distance MN to create report.	
2Reports	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
1Completing Direct Admit letter	Bree will work on adding the suggested additions and updates to the letter.	1/27/26		2/10/2026