

2025-26 Strategic Enrollment Priority Project

MEETING INFORMATION

TITLE	Salesforce		
DATE	Tuesday, May 19, 2026	TIME	9:00am
LOCATION	Zoom	RECORDER	Mindy Rist
CO-CHAIRS	Sara Johnson		
MEMBERS	<p>Present: Sara Johnson, Shad Gangl, Scott Foss, Mindy Rist, Tiffany Brunko, Amanda Kinney, Joseph D Agbeko, Bree Dronen, Kristi Karels, Lisa Gunderson, Katlyn Tamaalii, Alyssa Montgomery, Amanda Hoglo</p> <p>Absent: Mary Lenz, Melissa Schmelz, Stacey L Hron, Stephanie DenHartog, Chad Sperling, Sarah Dorn</p>		

NEXT MEETING: Tuesday, June 2nd at 9:00 a.m. on Zoom

Action Item Status

Action Item	Brief Update	Date	Other Information	Date Completed
17. PSEO	<p>Next Steps:</p> <ul style="list-style-type: none"> • Course info is needed • App end dates need to be built into Salesforce • How to track high school transcripts, as one is needed each year. Would need to be a manual field, rather than "met" • Field for NOSR received needed • PSEO email address needs to be set up in Salesforce • Fields by semester to show PSEO student type needed • Eligibility field needed 	5/19/26	<p>Make sure they are coded as 20 or 21. 31 are students from another college taking a Northland course. Need to write out application process. Eligibility field needed. Lisa and Mindy to set up a flow chart of PSEO app process.</p>	

16. Emails	Looking into if it would be possible for Northland to have access to Distance SF for when emails were sent.	5/19/26		
15. End Dates	Sara, Bree & Alyssa will get together to look into end dating application status, as this is what Salesforce picks up.	5/5/26		
14. PSEO	PSEO Salesforce to move forward. Compiling a list of which pieces need to be added to Salesforce and how it will work with what we are currently using. Custom fields need to be added.	5/5/26	5/5/26 Smaller group to meet for next meeting, as it will be focused on PSEO. (May 19)	
13. CRM	Will be using current CRM (Salesforce) for 2 more years. New CRM is expected to run alongside current & Workday.	5/5/26	5/5/26 Sara has been reaching out to other schools to learn how they are utilizing Salesforce.	
12. Salesforce 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	5/5/26 Bree & Scott have not met yet but will meet soon. Coding is currently being looked it.	
11. 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	4/21/26 Still no update. Meeting was canceled. Chad is working to reschedule.	
10. 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	2/21/26 Work in progress	

9. Security	Scott & Shad looking into security settings and permissions in Salesforce	3/12/2026		3/12/2026
8. 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
7. 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
6. 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
5. 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
4. 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,	2/24/26

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