

2025-26 Strategic Enrollment Priority Project

MEETING INFORMATION

TITLE	Salesforce		
DATE	Tuesday, June 16th, 2026	TIME	9:00am
LOCATION	Zoom	RECORDER	Mindy Rist
CO-CHAIRS	Chad Sperling & Alyssa Montgomery		
MEMBERS	<p>Present: Chad Sperling, Alyssa Montgomery, Sara Johnson, Shad Gangl, Scott Foss, Mindy Rist, Tiffany Brunko, Amanda Kinney, Bree Dronen, Kristi Karels, Lisa Gunderson, Amanda Hoglo, Joseph Agbeko,</p> <p>Absent: Sarah Dorn, Mary Lenz, Melissa Schmelz, Stacey L Hron, Stephanie DenHartog, Katlyn Tamaalii,</p>		

NEXT MEETING: Tuesday, June 30th at 9:00 a.m. on Zoom

Action Item Status

Action Item	Brief Update	Date	Other Information	Date Completed
24. PSEO	Kristi and Lisa are meeting tomorrow (6/17) to finalize the items Kristi built for documentation and GPA checks	6/16/26		
23. Education Cloud	Discussing if changing to Education Cloud would be beneficial, as it would align with Distance MN	6/16/26		
22. Email	Emailing from Salesforce rather than just outlook, so all have access to communication with student. May need a separate email address set up.	6/16/26	Distance is set up so emails link to the student automatically, if they are already in Salesforce. Small group with Kristi to be scheduled.	
21. Report	Need report built for students wo are accepted. Bree will work with Kristi on getting the report built	6/16/26		

20. End Dates	A small group met to discuss closing applications for students not currently registered. If they have never attended, the app is canceled. If they have attended, it is end dated. Bree & Tiffany provided demonstrations. Adding end date for integration would help to filter in Salesforce.	6/2/26	Updated the integration script to pull the end date off an application	6/15/26
19. PSEO	Kristi will work with Lisa on integration for PSEO and gave an example of what it looks like in Salesforce currently.	6/2/26		
18. PSEO	<p>Next meeting with IT 6/4/26 at 3pm to check in on the below items and make next step plans.</p> <ul style="list-style-type: none"> ○ Kristi - Create 6 checkboxes for transcripts with date entry of last date received and same for NOSR (5/22) ○ Kristi - Create numeric field GPA entries (5/22) ○ Shad and Scott - Integrate end date (graduation date) (in the next two weeks) ○ Shad and Scott - Integrate pseo@northlandcollege.edu into Salesforce (in the next two weeks) 	5/22/26		
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	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.	

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	3/12/2026	Scott & Shad updated so Minn State schools don't	3/12/2026

	institutions. Will need to connect with Bree & with Alex Tech.		show as needing transcripts	
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, letters, and	2/24/26



			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