Engage Students through Transformative Experiences - Project Charter

General Project Information	
Project Name: 2025-26	**Project #2 RECRUITMENT – Implement Northland CRM Salesforce and a student life-cycle communication plan that maximizes the use of this CRM.**
Origination Date:	September 1, 2025
Project Champion: **Project Team Members:**	Stacey Hron and Sara Johnson Scott Foss, Shad Gangl, Bree Dronen, Katlyn Tamaalii, Amanda Hoglo Mindy Rist (recorder)
Executive Sponsor:	Shari Olson
Project Rationale: *Describe the business need or problem this project addresses:*	**Engage students through transformative experiences.**
Project Goals/Objectives/Success: *Describe how this project will resolve the business need. What does success look like?*	**Priority #2 - Enrollment** – • Increase enrollment by 10% each year for 3-years.
Strategic Alignment: Select how this aligns with the Strategic Directions and Priorities of the College	**ACCESS – Meet students where they are to ensure all have access to high-quality educational opportunities.** Strategies XX☐ 1.1 Expand recruitment to underserved populations. ☐ 1.2 Provide flexible learning opportunities. ☐ 1.3 Remove financial barriers for students. XX☐ 1.4 Provide clear pathways for students. XX☐ 1.5 Remove student enrollment barriers. XX☐ 1.6 Streamline transition from pre-college services to programs. **STUDENT SUCCESS – Improve outcomes, success, and completion through quality programs, advising, and student development.** Strategies XX☐ 2.1 Support students in achieving their educational goals. ☐ 2.2 Provide high-quality, relevant, engaging, and rigorous coursework. XX☐ 2.3 Create a vibrant, supportive, and welcoming environment for students. XX☐ 2.4 Provide exceptional student support services. XX☐ 2.5 Provide individualized services to increase retention and support learning, education, and career goals. XX☐ 2.6 Close equity gaps to improve success for all students. **PARTNERSHIPS – Strengthen partnerships with school districts, institutions of higher education, employers, and community organizations.** Strategies XX☐ 3.1 Expand collaboration with education partners. ☐ 3.2 Increase community engagement. ☐ 3.3 Expand employer partnerships. ☐ 3.4 Respond and adapt to the ever- changing market and partner needs. **ADVANCING EQUITY – Create an inclusive culture where all can reach their full potential.** Strategies XX☐ 4.1 Embody a welcoming and inclusive environment for all. XX☐ 4.2 Ensure equitable access to resources for historically underserved individuals. XX☐ 4.3 Ensure our campus community represents a rich array of experiences and viewpoints.

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	☐ 4.4 Establish community bonds through an understanding of our common humanity.
Change Management Impact: *What departments/ groups will be impacted by the change & how will they be impacted?*	New Students and Continuing Students, Marketing, Enrollment, Admissions,
Desired delivery date: *What is driving this date?*	Ongoing until enterprise-wide CRM is implemented in 2028-2029

Conditions to ground our actions:

- *Create and maintain strong retention and graduation rates*
- *Maximize current staffing to achieve our goals*
- *Stay within the current budget*
- *Enrollment growth is everyone's job*
- *There is urgency to grow enrollment…we must move now!*
- *Our focus on student engagement is paramount to our success*

Objectives and Success Criteria *Describe the measurable outcomes of the project, e.g., reduce cost by xxxx or increase quality to yyyy.*		
Objective/Success Criteria		**Expected Outcome Measure**
• Utilize Salesforce to manage and streamline the full student lifecycle, including recruitment, admissions, retention and communication. • Improve student engagement through timely, branded, and automated email communications that guide them through each step of the admissions process.		• Increase enrollment by 10% each year

Deliverables *List the high-level "products" to be created (e.g., improved xxxx process, employee manual).*
  • **Streamlined Admissions Workflow**: Enhanced efficiency and visibility throughout the admissions process.   • **Centralized Communication**: Eliminated reliance on spreadsheets—every interaction is tracked and managed within Salesforce.   • **Consistent Branding**: All email communications are branded to reflect institutional identity.   • **Automated Acceptance Letters**: Acceptance notifications are generated and sent automatically, reducing manual effort.   • **Proactive Follow-Ups**: Automated reminder emails are sent for outstanding requirements such as declared majors, immunization records, and transcripts.

External Dependencies *Will project success depend on coordination of efforts between the project team and one or more other individuals or groups? Has everyone involved agreed to this interaction?*

Minnesota State is currently undergoing a RFP to select an enterprise-wide CRM. At this stage, the final CRM has not been determined, and there are many unknowns regarding how it will integrate with the ongoing student Workday implementation.

Project Resources		
Role	**Name**	**Department**
Distance MN		
Previous contract with Foundation Partners		
NCTC-Salesforce Team		

Notes
When a new enterprise-wide CRM is selected and implemented, Northland will need to completely rebuild the system.

Charter Approval Sign-off

Role	Signature	Date (MM/DD/YYYY)
Executive Sponsor	Shari Olson	9/1/2025
Project Champion	Stacey Hron and Sara Johnson	9/1/2025

Document Revision History

Document Version	Revision	Date (MM/DD/YYYY)

Project Charter Created: 6-26-25