

Salesforce Team Leader Committee
March 4, 2024
3 pm – 4 pm
Co-Chairs Evan Pauken and Mike Thompson

In attendance: Lois Baldwin, Nkenge Bergan, Renee Daudert, Erin Dominianni, Lori Evans, Sarah Hubbell, Evan Pauken, Angela Marsh-Peek, Mike Thompson

Absent: Ryan St. John

Meeting Minutes from 12.4.23 were approved.

1. Depersonalizing the staff in selected email exchanges

a. Template Clean-up

- i. (ED) has gone through and cleaned out the international and recruiting templates so they are generic and not personal.

b. Organize and simplify

- i. Action Item: Each department should go through and select what they are using.

c. Communication with Students about events

- i. Action Item: Informing students of events in the same programs of study that may have different advisors. For example, KVAAP, Dual Enrollment, and the Promise have different advisors and may not receive the same message from a nursing event.

2. ConexEd / Salesforce Integration

- i. There were improvements made to the My Valley link.

3. Group Assignment Updates

- a. Everything is up to date and recruiters have new territories.
- b. There is a better balance of workload.
- c. Readjusted international students by spreading them out through the advisors.

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4. Inactivation or portal accounts

a. Application Process

i. Action Item: Applicants reapplying to the college can have an easier way of signing in.

5. Axiom Updates

a. Close to the end of the project and moving everything into production

6. Sandbox for upgrades

a. IT is exploring the addition of a second salesforce sandbox.

Adjourn: 4:03 pm (SH)