

TargetX Committee

August 22, 2023

1pm – 2pm

Attendance: E. Pauken, M. Thompson, S. Hubbell, R. St. John, E. Dominianni, A.

Marsh-Peek, A. Cederberg, R. Daudert

Absent: C. Reuss

Minutes: E. Bishop, V. Prince

- I. Welcome – M. Thompson
- II. Minutes from the 5/8/23 meeting were approved as presented
- III. Evaluate Retention and Scheduling Products
 - a. Dropped retention from TargetX and going with a homegrown solution
 - b. Move funds to a new tool from TargetX instead of the retention products
the lesson products, outside TargetX email campaigns, they will
coordinate actual personalized mailings to parents/ students based on
actions taken in TargetX
 - c. Could this be done through TargetX print or would it be worth doing this
consulting?
 - i. looking into specific ideas like dual enrolled students, and efforts to
keep those students as ours once out of high school
 - ii. Automated system set to our parameters that would roll without
information from me
 - iii. To the parents of a student could add to the app
 1. parent info would need to be requested

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2. Work on trying to involve parents with students
 3. For our high school students we cc parents with communications
 4. could put together an example if we would choose to go this way
 5. It might be worth additional conversations and seeking out funds
- iv. Test the waters with smaller targeted groups before making a whole college project
1. Use an intelligent names list
 2. Evan crunching the numbers on students having movement based on the intelligent names list
 3. Marketing just signed on with another 3rd party and they are going to add info to our list based on their new intake of info
- d. Implementation of ConnexED for scheduling product
- i. Cathy Colella is the lead for that project
 - ii. Mike/Evan has spoken with Cathy about the additional products that are coming through with this product
 1. if the product does not allow us to pull information and send reminders to students about counselling then we need to look into other means of having this happen
 2. Salesforce target x should be able to feed into this for help

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iii. Cathy has a list of data that Mike and Sarah will go over to check for FERPA before it is put into the new system

1. Everyone who schedules right now has access to the student access center
2. unless we are concerned about the security of the new program then users in question already have access to this looking for something to flag specific cases
3. there are concerns that other groups will be using this in the future who will not need access or should not have access

iv. launch date up to Cathy

1. goal second week of the semester
2. online scheduling will be back
3. option to send communication to the student and for students to directly choose a specific counselor

IV. SMS messaging opt-in/out

a. More access to bulk messaging

i. Enrollment team

1. would like to have more timely automated text messaging go out
2. Targetx has the ability to draw students from a report and send
3. we need to decide who we want able to send a message

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- a. If we could have more people responding to the bulk line, if the enrollment team can access this then they can manage the responding and see how frequently and to whom we want these messages to go out
 - i. They would not be doing scheduling, just bulk messaging
 - ii. there are several steps to take before this can be set up
- ii. We need to figure out a way to send an email alert with the text message going out
 - 1. an email to the team working on it telling them someone has responded to cut down on confusion
 - 2. email alerts can be done on the bulk line and this can be checked per user
 - 3. Ryan has an on-duty recruitment worker each day for whom this could be a task each day
- iii. Make sure if any of these messages go out if they are referring a student to another department, loop that department in so they know this is going
- iv. The Get-it-done events used in this process and it went well

V. Axiom Enhancements

- a. We are utilizing and using TargetX for used names

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b. Preferred Names

- i. If it is in the preferred name slot when Axiom tries to change the name it bombs out, It is not inserting the name slot, and we do not know this has happened until it is found
- ii. It is working on a way for them to notify when that has occurred
- iii. Testing to try to fix this then it will be ready to launch

c. Last enhancement was after the cyber security incident

d. No major upgrades are known to be happening

VI. Form assembly Licensing/Program Admissions

a. Major licensing

- i. those without it can only see the major forms and files
 1. they are missing options to download CSB
 2. those with it are able to do everything
 - a. we can limit what someone is doing, but we must put in the limitations, the default is full access

b. We are not currently compliant with licensing

- i. Each License is \$400
- ii. We might have to buy full licenses to be compliant
 1. they may be able to get by with limited individual application access
- iii. They might get the information from other things, Evan and Mike will follow up with this to find out

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VII. Social Security Numbers/ PII

- a. We still use this to stop duplications, not sure we will be able to fully remove the use of these
- b. Concern that the information would remain in salesforce but it appears now that there is not an appropriate time to remove it
- c. When we first implemented and went live we didn't bulk download in the index
 - i. the applications and we implemented a product that when you printed is not the application and to index all the information out of TargetX and this needs to be fixed
 - 1. possible fix through elusion extender
 - 2. we need to get all those applications out and indexed before they can be removed
 - a. Renee might be able to accomplish this (You're a wizard Renee)
 - 3. a batch index would be good or an indexable format
- d. Holding this for now if needs to be confirmed as a secure practice before moving forward

VIII. Other

- a. Nothing at this time

IX. Meeting adjourned