TargetX Committee
Dec 4, 2023
2:30pm – 3:30pm
Meeting Minutes

In attendance: Ryan St. John, Sarah Hubbell, Erin Dominianni, Renee Daudert, Mike Thompson, Evan Pauken

Absent: Angela Marsh-Peek, Nick Yahr

1. ConexEd / Salesforce Integration
    a. ConexEd is up and running on a limited basis, for a small group of staff
        i. Students can sign up using the custom links generated by ConexEd for specific users
        ii. Not yet published to the website, just being communicated via email
    b. Discussion regarding the integration between appointment scheduling system, ConexEd, and Salesforce
    c. Nick Y, Renee D and Evan P working to add custom ConexEd scheduling links to the "MyAdvisor/Campus Contact" display in MyValley
        i. This functionality relies on FormAssembly prefilling data for the user logged into MyValley
        ii. Need to determine the additional users, beyond advising and counseling, which may also have contacts assigned to them within the Salesforce CRM
        iii. Need to ensure that usernames are consistent for all users for the formula to generate the proper URL
    d. Unsure of the integration ConexEd may have with Salesforce
        i. Calendar integration may be the extent of integration
2. Caseload updates
    a. Angela M-P and Evan P have been reviewing and making updates to advising and counseling caseloads, including caseload updates to new advisors and Kalamazoo Promise advisors
    b. Worth researching the ability to store (and generate) contact owner/primary advisor in Banner as opposed to Salesforce
        i. What would this process look like
    c. Check timing for Salesforce "Inactive" status
3. Recruitment caseload adjustments – Timing
    a. Discussion around funnel communication for students that have applied but have outstanding enrollment requirements
    b. There is a need to development automated email and SMS campaigns personalized from contact owners to share information about next steps
        i. During heavy recruitment seasons, automated response would ensure that communication happens soon after students complete steps
    c. Integrate student ambassadors to interject additional communication and outreach to supplement system generated communication
        i. Drip campaigns

        d. A/R/R sends personalized checklists to students
- i. Need to trigger off of the "admitted" status and "decision date"
  1. Sarah H will follow up with the fields/statuses needed to generate the reports

        e. Group visits need attention
- i. Challenging to manage group visits with HS counselors, because of the back and forth communication required
  1. Consider TargetX Events or Microsoft Bookings as options to help manage this
  2. Ryan will connect with Evan P and Renee D

4. Capital Requests due December 15
- a. If there are any software needs, contact Mike before the deadline

5. Other
- a. Axiom engagement
  - i. Prioritized the things that we need updated
    1. Many smaller thing
  - ii. Used names
    1. Was working but then something has shifted functionality twice after the process was working during testing
  - iii. Next item on the priority list is moving back the NAC to Salesforce from Banner so it can be displayed on the student's electronic account information
    1. Student will need their username/email address and the NAC to provide information needed to create their MyValley student account
  - iv. Also working with Axiom to reactivate students that have been marked inactive, for those that reapply to the college
    1. The determined method would work for the majority of students
- b. Upgrade has been delayed for some time due to ongoing testing
- c. Considering changing the name of the committee to capture the focus multiple systems that integrate with Salesforce

Adjourn: 3:51pm