# 2023 TBSr Salesforce Conference

## Event Logistics

### Building Access

Access to the Carlson School of Management is restricted to keycard holders and not open to the public. We will have a student at the door on the north side of the building between 7:45 AM and 9:00 AM on Thursday and Friday. Need help? Please call Keri Poeppe at 612-202-1171 or Nick Lindberg at 651-260-4552.




### Event Rooms

We are meeting in the Executive Center Room 2-260Z, which is on the second floor. We will have signs in the building to help direct you to the Executive Center. All sessions will take place in this room.

# 2023 TBSr Salesforce Conference

## WiFi

Use the UMN Guest Network or Eduroam while you are on campus.

## Help

Please call Keri Poeppe at 612-202-1171 or Nick Lindberg at 651-260-4552.

## Program - Wednesday, July 19, 2023

| | | Location |
|---|---|---|
| 9:00am - 3:00pm | Optional pre-event<br>Upper Midwest Higher Education Salesforce User Group<br>Focus will be on Education Cloud | University of St. Thomas<br>Science Center Room 150<br>39 Cretin Ave<br>Saint Paul, 55105 |
| 5:30pm - 7:30pm | Welcome Reception at Town Hall Brewery<br>Sponsored by Crowe Consulting<br><br>Join us for drinks and appetizers!<br>Conference check-in | 1430 S Washington Ave<br>Minneapolis, MN<br>55454 |

## Program - Thursday, July 20, 2023

| | | Location |
|---|---|---|
| 8:00am - 8:45am | Breakfast at the Carlson School of Management | Carlson School of Management - Executive Center Room 2-260 Z |
| 8:45am - 9:00am | **Welcome by CSOM Dean Jamie Prenkert and Connie Buechele, CSOM's IT Director**<br>Conference Logistics (Wi-Fi, where to find…, dinner plans, sponsors) | |

# 2023 TBSr Salesforce Conference

| | | |
|---|---|---|
| **9:00am - 9:15am** | **Warm Up/Round the horn**<br>All Business School Attendees | |
| **9:15am - 10:15am** | **Applicant Scoring Rubric**<br>Theresa Kenagy, Texas Christian University<br><br>How we took data from Salesforce, added subjective data recruiters learned from essays and interviews and put them on a scale to create a score, weighted differently depending on the program through the use of a screen flow. | |
| **10:15am - 10:30am** | **Break** | |
| **10:30am - 11:00am** | **Welcome to Grad School! Now What?**<br>Zach Rickert , University of Washington<br><br>How we enable grad programs to onboard new students using FormAssembly, Experience Cloud, and connections to other university systems. | |
| **11:00am - 11:30am** | ***Lightning Talk: Share your coolest feature or favorite build**<br>All B-school attendees can participate! Take the stage for 5 minutes to show off your report, dashboard, flow, or other nifty feature.<br><br>Penn State - Form Assembly form | |
| **11:30am - 12:30pm** | Lunch (sponsored by Attain Partners) | |
| **12:30pm - 1:30pm** | ***Education Cloud Overview**<br>Presented by Attain Partners | |
| **1:30pm - 2:30pm** | ***AMA: A Salesforce Solutions Architect**<br>Nathan Baker, Jonathan Maher, Elle McKay - Salesforce | |
| **2:30pm - 2:45pm** | **Break** | |

# 2023 TBSr Salesforce Conference

| | | |
|---|---|---|
| **2:45pm - 3:15pm** | **Group discussion: What happens when you have multiple CRMs, such as Slate and Salesforce?** How do you manage data flowing between systems? How do you ensure accurate data? What lessons has your organization learned from managing multiple CRMs? What do you wish you could do differently**?** | |
| **3:15pm - 3:45pm** | **Tippie Action Portal**<br>**Brandelle Unkrich, Tippie College of Business**<br>Portal faculty and staff use to enter their data. Feeds to digital signs and web profiles and use it for reviews, accreditation, promotion, and more. | |
| **3:45pm-4:30pm** | **Executive Education program management in Salesforce**<br>Nick Jonczak, Wharton | |
| **4:30pm - 5:30pm** | **End of Day/Break Before Cocktail Hour** | |
| **5:30pm - 8:30pm** | **Cocktail Hour and Dinner**<br>Happy hour starts at 5:30pm on the Terrace, buffet dinner at 6:30pm in Conference Rooms A,B, & C<br>We can walk or take the train from the Carlson School<br><br>Co-sponsored by Huron and Salesforce | Coffman Memorial Union - Campus Club |

# 2023 TBSr Salesforce Conference

## Program - Friday, July 21, 2023

| | Leeds School of Business - 995 Regent Drive, Boulder | Location |
|---|---|---|
| 8:00am - 8:45am | **Breakfast** | Carlson School of Management - Executive Center Room 2-260 Z |
| 8:45am - 9:30am | **It Takes a Village: Our journey to providing actionable Placement Data for our Business Buffs**<br>Elicia Suren and Neeha Patel, Leeds School of Business - University of Colorado Boulder<br>The Leeds School of Business shares its never ending quest to provide meaningful placement data, using the power of Data Integrations, Salesforce, and FormAssembly automations. | |
| 9:30 am - 10:00 am | ***Lightning Talk: Share your coolest feature or favorite build**<br>All B-school attendees can participate! Take the stage for 5 minutes to show off your report, dashboard, flow, or other nifty feature. | |
| 10:00am - 10:15am | **Break** | |
| 10:15am - 11:00am | **Integrating Handshake data with Salesforce**<br>Nick Lindberg, Carlson School of Management - University of Minnesota<br>Integrating Handshake to Salesforce is a common request for Career Centers. The Carlson School will share how they have connected Handshake with Salesforce to assist with our corporate relations work.<br><br>**Symplicity to Salesforce Integration**<br>Sara McConkey & Greg Fox - Smeal College of Business - Penn State University | |
| 11:00am - 11:30am | **UX Design**<br>Nick Page, University of Notre Dame | |
| 11:30am - 12:30pm | Lunch (sponsored by Huron Consulting Group) | |

# 2023 TBSr Salesforce Conference

| | | |
|---|---|---|
| **12:30pm - 1:30pm** | **Communication solutions at Wharton**<br>Nick Jonczak, Wharton<br><br>**Lightning Talks/Group Discussion – Let's talk about communication solutions**<br>How are you talking with people? What apps are you using to support messaging campaigns, phone calls and texting?<br><br>All B-school attendees can participate! | |
| **1:30pm - 2:00pm** | **One-on-One**<br>One last chance to trade ideas and see what other schools have created OR join Connie for Tour of the Carlson School and its room tech | |
| **2:15pm** | **Conference Adjourn** | |

**A HUGE thank you to our conference sponsors!**

| **Salesforce:** | **Attain Partners:** | **Huron:** | **Crowe Consulting:** |
|---|---|---|---|
| Elle McKay<br>Nathan Baker<br>Ryan Gunderson<br>Vicki Sell | Kathy Malone<br>Leidy Smith | Dany Warman<br>Joanna Iturbe<br>Derek | Kevin Bailey |