



2020 TBSr Salesforce Conference

Tuesday, February 25, 2020

	Event room 207
7:00am-8:00am	Breakfast/Networking & Conference Check-in
8:00am-9:30am	<p>Demo Jam Demos and discussions from attendees on solutions in progress or deployed. University of Colorado, Wharton, Penn State, Auburn, Georgia and others will present their Salesforce history, success, and painful lessons learned, followed by lively discussion.</p>
9:30am-10:30am	<p>CRM critical success factors in Higher Ed Carrie Marcinkevage, Penn State Susan Winarchick, Penn State</p> <p>Creating & Sustaining a Salesforce Initiative: focusing on the most important people, process, and technology factors; aligning with your KPIs, and working across boundaries internally and with the central university.</p> <p>Crowd sourced discussion</p> <ul style="list-style-type: none"> • How to get started? • Staffing a Salesforce project in a Higher Ed environment. • The use of Consultants • Driving Adoption
10:30am-Noon	<p>Business Process Redesign & Object Architecture Nicholas Jonczak, Wharton</p> <p>Whether you're considering moving to Salesforce, currently transitioning, or years into your org, any change to your Salesforce architecture or interface is an opportunity to reexamine your business process. This session will offer best practices from WRDS on how to build SF to support the future of your business rather than feeling trapped by its history.</p> <p>Org Strategy Lori Sewell, Auburn</p> <p>The pros and cons of single vs multi-org strategies.</p>
12:00pm-1:00pm Terry Third Thursday Room	<p>Lunch</p> <p>Licensing Strategies Cory Hakes, Salesforce</p>
1:00pm-2:00pm	<p>Data Governance, Sharing, & Compliance David Kohnke, University of Colorado-Boulder Stephanie Gillin, University of Colorado Boulder Charles Rejonis, Wharton Nick Lindberg, University of Minnesota</p>



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2:00-3:30	Triggers, Flow, Process Builder & Workflows Joanna Iturbe, University of Colorado-Boulder With all the out-of-the-box automation features Salesforce offers, it can be overwhelming and confusing. Let's review the differences between them, the best practices we've established over the years, and what our favorite automation tool is and why?
3:30-4:30	Integrating Salesforce & Slate Vadim Gorelik Huron Consulting EDA Customer Research Study Salesforce
5:00pm-8:00pm 950 East Paces Ferry Rd NE, Atlanta, GA 30326	TBSr Salesforce Reception (Separate Registration Required)

Sponsors:

Salesforce: <ul style="list-style-type: none">• Elias Ferdoussi• Alex Rich• Chris Coppa• Cory Hakes• Kirstin Rauscher• Drew Holder• Dan Cantrell	Huron: <ul style="list-style-type: none">• Vadim Gorelik• Kyle Schmid• Derek Luther
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2020 TBSr Salesforce Conference

Wednesday, February 26, 2020

	Event room 207
7:00am-8:00am	Breakfast/Networking
8:00am-9:00am	Pardot vs Marketing Cloud vs Marketo Salesforce & Crowd Sourced
9:00am-10:30am	Analytics With Salesforce: Past, Present and Future David Kohnke, University of Colorado-Boulder Joanna Iturbe, University of Colorado Boulder Analytics is one of the hottest topics in higher education. Salesforce touts Einstein Analytics as an easy, DIY solution for all your data crunching needs. Not so fast! Learn how the Leeds School of Business leverages our data within Salesforce to make actionable decisions with and (mostly) without Einstein.
10:30am-12:00pm	Permission Set Groups: The next generation of User Management Alexander Rich, Salesforce The Current Generation of User Management: Permission Sets, Profiles, Roles & Sharing Permissions Joanna Iturbe, University of Colorado-Boulder
12:00pm-1:00pm	Lunch
1:00-2:30	Development, Release Management, and Change control in a “click to configure” platform. Jeff Hilyard, University of Georgia Nick Lindberg, University of Minnesota
2:30pm-4:00pm	Data Management: duplicates, import, and object merge Vadim Gorelik Huron Consulting Integration Pain points – external sources, AppExchange products, etc. Crowd sourced discussion



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4:00pm-5:00pm	Roundtable Discussions Crowd sourced discussion Multiple small table discussions centered on specific interests at each table. Attendee feedback will determine the table topics Topics suggested so far: <ul style="list-style-type: none">• SAL• New to Salesforce• Student recruitment• Alumni & Development• Exec Ed• Event Management• EDA Use Cases and Pain Points• Account Hierarchy and Affiliations
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