



MAXIMIZING SALESFORCE *for Recruitment and Admissions*

March 27th, 2019
Portland, Oregon

With co-hosts:

 salesforce

and

Portland State
UNIVERSITY 

Portland State University, Karl Miller Center | 615 SW Harrison Street | Portland, OR 97201 | [Register](#) | [Parking Info](#)

AGENDA

10:00 am – 10:10 am

Room 258

Opening Remarks, Introductions, Agenda, Top of Mind

Lawrence Levy, President (ERX) | Joe Wiggins, Director of Sales and Wendy Papkoff, Account Executive (Salesforce)

10:10 am – 10:30 am

Room 258

Trends in Higher Education Admissions

Margo Martinez, Director of Industry Solutions (Salesforce)

Hear how admissions offices are changing the way they find, attract, and engage with their prospective students, giving them fresh insights into what drives yield and identify applicant and enrollment trends across geographies, demographics, clusters of personas, and devices.

10:30 am – 11:00 am

Room 258

Voice of Clients

Lawrence Levy, President and Matt Palmer, Implementation Consultant (ERX)
Margo Martinez, Director of Industry Solutions (Salesforce)

Clients will share their success stories during a panel discussion.

11:00 am – 11:10 am

Break

11:10 am – 12:00 pm

Room 258

Solutions Demo Overview

Lawrence Levy, President (ERX)

How are leading institutions maximizing Salesforce for Recruitment and Admissions?

12:00 pm – 12:30 pm

Room 258

How to Recruit and Find More Students

Adam Martin, Lead Solution Engineer (Salesforce)

Learn how schools are revolutionizing digital marketing across admissions and recruiting. Including the social channels with your marketing strategy and how to engage prospective students through targeted journey campaigns.

12:30 pm – 1:00 pm

Lunch (3rd Floor Commons Area)

1:00 pm – 2:15 pm

Room 258

Events Rx Workshop

Enrollment Rx

This training session will focus on Events Rx, Enrollment Rx's event & visit management tool. We will review step by step how to create, manage, and publish an event, and how to create a custom event registration form.

2:30 pm – 3:45 pm

Room 258

Enrollment Rx Client Pardot Workshop

Enrollment Rx

If you are a user of the Salesforce Pardot marketing tool, or interested in seeing how Pardot works, come learn from Salesforce Marketing Cloud experts on general functionality as well as some best practices followed by other higher ed Pardot users.

4:00 pm – 5:15 pm

Room 258

Reports & Dashboard Workshop

Enrollment Rx

Learn how to get the detailed information you want, graphed in a way that's easy to understand.

5:30 pm – 7:30 pm

Cocktail Reception: wine, beer and hors d' oeuvres will be served (1st Floor Atrium)