Briefing SUNY Poly’s President on why we should continue with Slate as our official CRM

Aaron J. Swancott
SUNY Polytechnic Institute

Author Note:
Prepared for the Institution and the Information Design + Technology (MS) program.
Abstract

Slate is a comprehensive platform for admissions & enrollment management, student success, and alumni & advancement. Slate, by Technolutions, is the only customer relationship management software (CRM) to provide a single interface for outreach communications, travel management, online applications, alumni and donor engagement and more. I will include a review of how SUNY Polytechnic Institute (SUNY Poly) previously processed applications, hosted events, and effectively communicated with students before the use of Slate. Then I will assess how Slate has enhanced SUNY Poly’s undergraduate admissions office improvements on production and effective communication with students. My goal is to provide advanced data to show a proposal on why Slate should be your institutions official CRM and include recommendations on how to be a premier user. A journal will demonstrate the theories and methods on how other institutions use Slate and how they have designed and implemented successful plans at their institution. This conclusion should explain why Slate is the best CRM for any institution, specifically SUNY Poly.

Keywords: Technolutions, CRM, SUNY Polytechnic Institute, Slate.
# TABLE OF CONTENTS

Methods........................................................................................................................................Pg. 5

Overview of Customer Relationship Management (CRM).................................................................Pg. 7

What is a CRM?...............................................................................................................................Pg. 7

Why do College Institutions use CRM software programs?.........................................................Pg. 8

Choosing the Right CRM for your College Institution.................................................................Pg. 9

What is Slate?...................................................................................................................................Pg. 9

Features..........................................................................................................................................Pg. 10

Marketing, Communication, Queries, Reports and Data Management..........................................Pg. 11

SUNY Polytechnic Institute..............................................................................................................Pg. 12

SUNY Polytechnic Institute before CRM.......................................................................................Pg. 13

SUNY Polytechnic Institute Now....................................................................................................Pg. 14

Future of SUNY Polytechnic Institute with Slate as your Official CRM........................................Pg. 15

"Roadmap” for Advancing Slate on Campus.....................................................................................Pg. 16

Resource Savings with Slate.............................................................................................................Pg. 17

Untapped Potential to Become Premier Users of Slate.................................................................Pg. 17

Conclusion.......................................................................................................................................Pg. 18

References.......................................................................................................................................Pg. 20

List of Figures..................................................................................................................................Pg. 22

Research Journal...............................................................................................................................Pg. 24

Research #1 – Freestorming Session.................................................................................................Pg. 25

Research #2 – Delphi Method...........................................................................................................Pg. 29

Research #3 – Qualitative Research Method....................................................................................Pg. 32
Slate which is a CRM has been a passion of mine for the past 4 years since SUNY Poly contracted with Technolutions. I have been designing and implementing ever since for the Undergraduate Admissions office. I am currently expanding my role with different campus partners which had me realize, how can I show our new incoming president that Slate should be our official CRM at SUNY Poly. What untapped potential are we missing and how do we get there? With a new incoming president coming in to SUNY Poly, I felt this is a perfect opportunity (if I ever have the chance to) to present to our president about where we were, and where we could be.

College admissions, before the days of using a customer relationship management (CRM) tool, accomplished everything manually. From reviewing applications with documents in a manila file folder to planning your own travel recruitment, processes were tedious and manual in nature. A software called Slate, created by the company Technolutions, is currently the most advanced CRM on the market today. There are many alternative CRM out there, such as, Element451, TargetX, Ellucian, and Salesforce to name a few that are competitive CRM software’s.

Methods

In order to start this project, I first did some “Freestorming” with a colleague of mine, Alyssa Steele who is the Coordinator of Enrollment Marketing at SUNY Poly. She is also an adjunct professor at SUNY Poly and teaches COM 307. With her assistance, she helped me formulate my paper and organized all of my ideas for a president. I needed to get all my ideas out and start creating a plan because there are multiple components to Slate. Once I had my thoughts organized, I needed to do some research. I adopted the Delphi method which is a technique
where you can ask a survey-based question to help systematically process a prediction using collective opinions from other members. I proposed a question on Slate’s Knowledge Base (Journal, pg. 28) which is a Slate community where you can explore documentation and training videos but also ask questions, share tips and discuss best practices. I also proposed this on social media, specifically Facebook to a group called “Super Slate Technolutions Friends” (Journal, pg. 29). This method helped me interact with Super users of Slate and provide what they think are the most important messages about Slate.

I knew I needed to collect some information in 3 different areas. A super user of Slate, the history of SUNY Poly, and a someone who is currently in charge at SUNY Poly. The Qualitative Research method was an opportunity to discuss some important components of my paper. I have known each individual for many years and I sat down with them to have a conversation about Slate. First was Tyler Lowell, who used to work at SUNY Binghamton and was one of the first SUNY’s to use Slate. Tyler then went to SUNY Systems where he helped with the RFP process in which SUNY contracted with Slate to help onboard 30 other SUNY schools with Slate. He then took a job at the University of Albany where he is currently the Associate Director of Admissions Technology and Research. He is a Slate Guru for the SUNY schools.

I meet with Maryrose Raab who is currently SUNY Poly’s Associate Vice President for Enrollment Management. Maryrose has been at Poly for 20+ years and her knowledge of Admissions before the day of Slate was very humbling for me. I gained so much knowledge and understanding on how specifically SUNY Poly operated before the use of Slate. Then finally, I had the opportunity to meet with Dr. Andrew Russell, who is currently the Office-in-Charge at SUNY Poly. This was an opportunity for someone who has a bird's-eye-few to make those types
of decisions to gain insight on what someone in their position would like to know more about Slate.

**Overview of Customer Relationship Management (CRM)**

From the beginning, college institutions did not have CRM systems to operate their admissions office. Application review, travel, and the relationship between students and prospective students were communicated the old fashion way. The “old fashion” way was buying names from companies, sending “snail mail” and hoping you will lead that student to your institution. You would then review paper applications and keep track of them in using a filing cabinet with paper records. With the use of a CRM system, we can now centralize data storage and access, automate administrative tasks, improve marketing, and enhance internal communication with other campus partners.

**What is a CRM?**

By definition, customer relationship management (CRM) is a technology software for institutional relationships and interactions with students and potential students. CRM systems help institutions stay connected with students, streamline processes and improve effectiveness. CRM systems accumulate student data across different platforms to utilize them in one database. Platforms such as marketing, communication, documentation, student interactions, and more are all located in one database for sophisticated data analysis.
Why do College Institutions use CRM Software Programs?

Many college institutions today have adopted some sort of CRM software to improve their customer service relationship to increase enrollment. This specifically applies to admission’s offices. There are many reasons in what institutions hope to achieve using CRMs. In (figure 1) the biggest hope is to improve customer service. When we interact with students, and they have a great customer service experience, likelihood for students to enroll at your institution would be higher than those who do not.

We use CRM in higher education as a “one-stop-shop” (Noori, 2023). From recruitment events, outreach efforts and practically anything a college engages in regarding student-based needs, a CRM software can provide senior leadership with actuate data to drive the institution in the right direction. Decision-makers can take that information they pull from a CRM and use it to improve programs and empower stakeholders from admissions and academic departments to keep data organized and current. You can personalize your outreach using college branding templates, streamlined admission processes, event management and many other sophisticated features meant to improve college recruitment and increase enrollment.

“CRM software has revolutionized how we do business” (Talarico, 2022). These powerful tools can increase data support, internal communications, and even operation management. Today’s modern CRM theories refer to the idea of integrating the customer. This look for colleges is the theory that today’s generations need instant gratification, and a powerful CRM can provide that for a student. In return, CRMs will increase application numbers, enrollment, alumni engagement and even donor contributions. Colleges are able to automate processes, build workflows, and optimize staff productivity when most college institutions are
understaffed due to the COVID-19 pandemic. CRMs have given many colleges the ability to be efficient in communicating and working with college aged students.

Choosing the Right CRM for your College Institution.

When choosing the right CRM for your institution, there are many components to consider. There are, “5 key considerations as you decide whether to build or buy” a CRM (Lees, 2021). (These considerations are: the integration, converged CRM which is an all in one CRM, adaptability and cost, capacity, and growth). You should also be cautious because CRM system’s can have some drawbacks. If we purchase a CRM software, how could we pivot if something happens with that software. Luckily, When SUNY Poly was considering these options, we met with 4 other venders before we choose the best software for our needs. Those competitors, such as, Element451, TargetX, Ellucian, and Salesforce all have great functionality, but lacked the design and tools needed for SUNY Poly to be successful. It was decided that the best software was by a company by Technolutions, called Slate. SUNY Central also created a contract with Slate in which other SUNY campuses like us signed a contract is if something did happen with the software, we would have a contact in place.

What is Slate?

Slate is a comprehensive platform for admissions & enrollment management, student success, and alumni & advancement (technolutions.com, 2023). Slate is one of the most comprehensive software’s in the market and is a one stop shop for all administrative areas of a college institution. With many CRM software companies out there, Slate CRM is specifically designed and developed for higher education (figure 3). With their single unified interface,
students enjoy the experience of instant notifications and admissions decisions. Slate started in 2000, and has evolved to service more than just the admissions office. Slate started having close to 100 colleges utilizing their platform and as the years went on, they now have over 1700 colleges and universities using their product. Slate has never stopped progressing, marketing to many other campus partners. In fact, among the top 50 universities in the United States, 48 use Slate (*figure 2*). Many institutions start with admissions and branch out to other areas such as graduate admissions, intuitional research, alumni, and donors.

**Features**

Slate proposed a solution to handle the evolving needs of admissions and enrollment management. Slate has countless features that should excite any user. Features such as:

- Multiple communication channels (SMS, email, voice, social media, print)
- Dynamic marketing automations
- Drag and drop form builders
- Customized fundamental portals
- Event management and automatic communication
- Embedded communication statistics & analytics
- Appointments and interview (in-person and virtual)
- Trips and travel
- Data visualization & analytics
- Powerful queries, reporting, and data management
- Document hosting & management
SLATE AS YOUR OFFICIAL CRM

- Duplicate record management
- SFTP batched import/export
- Custom applications and student status portals
- Application review from anywhere at any time
- Instant decision release and customized decision letters
- Intuitive record management
- Automated multi-office workflows
- Custom Dashboard
- Rules & automations
- Bi-directional integrations with Student Information Systems (SIS) (EX. Banner)
- Secure web service cloud (Campus Single Sign-on (SSO))
- Educational resources such as knowledge base and community forms

Marketing, Communication, Queries, Reports and Data Management

Over 6.5 billion email messages are sent every year. Why? Because it is “free” marketing. Many college institutions email recruits and applicants as their official form of communication. Sending even 100 emails manually would be very time consuming. Slate has the ability to send numerous emails with one click. It also has the ability to automatically send communication based on triggers. These can occur upon registration for a campaign or event, and can be communicated hours before and/or after an event. Along with the communication aspect, you have the ability to capture detailed communication analytics. In addition to standard data points (opens/clicks/bounces/opt outs/etc.), you have the capability to generate delivery reports about the device, location, and other details for enhanced tracking. Slate also provides email address
deliverability and validation, helping you understand why particular messages may have bounced or skipped in transit.

Knowledge is power. The availability of rich data obtained and use to drive more accurate predictions and stronger personalization is some of the most robust options Slate has to offer. Any data point, anytime, by any user. Slate has powerful query builders that let users build queries without the need for IT assistance. Any data point is easily accessible with just a few clicks. Besides the queries, Slate can provide influential reporting tools for year to year predictive modeling containing data tables, charts and geo maps. This is very useful for any college institution when Directors and Vice Presidents for Enrollment Management need to make decisive decision.

**SUNY Polytechnic Institute**

SUNY Polytechnic Institute (SUNY Poly) dates back to 1966 when it was formally known as “Upper Division College at Herkimer/Rome/Utica” in New York State. ([History of SUNY Polytechnic Institute](#)). With enrollment growth, the institution added additional buildings in Utica, NY and Rome, NY and adopted the new name in 1977: The State University of New York College of Technology at Utica-Rome. A few years later, construction began in Marcy, NY where the first building, Kunsela Hall, was completed in 1984. In 1989, the college name changed once again to the “State University of New York Institute of Technology (SUNY IT)”.

Then as luck would have it, the Chancellor of SUNY and New York Board of Trustees approved the merger of SUNY IT and the College of Nanoscale Science and Engineering (CNSE) in Albany, NY to change its name to SUNY Polytechnic Institute.
SUNY Polytechnic Institute before CRM

I was fortunate enough to interview Maryrose Rabb who is the Associate Vice President for Enrollment Management at SUNY Polytechnic Institute (Journal p. 13-14). Maryrose has been in higher education for over 20 years and has worked in SUNY Poly’s admissions office from 1995 to 2004. During the interview, I was able to gain more knowledge on how SUNY Poly has previously operated their admissions office to carry out daily processes. During those years, internet and email was still fairly new, so their official form of communication was mail. SUNY Poly adopted a Student Information System (SIS) from SUNY Central in which their data was stored for recruits and enrolled students. Paper applications were fading away as time went on and became entirely electronic. Data loads were sent from SUNY Central to SUNY Poly’s SIS. As the application data loads were sent to SUNY Poly, manila folders were sent to the campus to hold official paper transcripts, letters of recommendations, etc. Since mail was still their form of communication, carbon copy checklists were created and sent to the student and were housed in these folders for references. Phone calls were made to students about their application and phonathons were utilized to enroll students.

In order to extract the data, a third-party software was used. Information Technology (IT) professionals had to create query reports for counselors and management to drive their decisions. Once the data was extracted, they then had to manipulate the data for their own professional use. When an admission counselor went out on the road for travel and recruiting territories, SUNY Poly visits was mostly based on historical patterns.

I was hired at SUNY Poly in 2011 where I integrated into the manual daily admission processes. The manila folders, the canned response emails, the multiple third-party software’s were all integral parts of performing your job duties. I was fortunate enough to work extremely
hard and get promoted within SUNY Poly to become the Assistant Director of Admissions Operations. In 2019, as part of SUNY contracting with Technololutions, we purchased Slate as our first CRM at SUNY Poly.

**SUNY Polytechnic Institute Now**

SUNY Poly is currently in its 4th year using Slate as our official CRM. I have had the privilege to design and implement Slate for SUNY Poly’s undergraduate admissions office. The initial set-up was very time consuming since I had to learn and build our custom options to SUNY Poly. We started with a “Request more information” form (most institutions do) to start building student data in our database. Once completed, we developed communication plans to market to our prospective students. Being in the infancy stage, we loaded any name buys (student data) into Slate to grow our database. We were still using third-party software’s such as “MyEmma” to mass communicate to students, “Signal Vine” to text students and “Argo” to export student data for reports.

As the year went on, I created the data mapping for application loads. The purpose for this was so our counselors could read applications online and to move ahead with discontinuing utilizing file folder paper applications. With the data mapping, I setup up secure file transfer protocol (SFTP) processes to obtain documents digitally (previously viewed by a third-party called campus connect), built workflow processes, and created automation for counselors to make real time decisions on applications. At this time, admissions counselors continued to record application data in our SIS (Banner). I created a process where they recorded all the data in Slate which could be exported from Slate to our SIS. Argos, our SIS reporting tool continued being used by counselors to run admissions data for enrollment management. I built multiple user-
friendly reports and dynamic queries for Counselors, Directors, Vice Presidents, and even Institutional Resource (IR) to empower users’ decisions utilizing that data.

Today, because of all these Slate builds, we were able to save time and money and eliminate many manual processes and third-party vendors such as “MyEmma” and “Signal Vine”. All of our data is centralized in Slate so admission counselors no longer need to log into a third-party software to perform their daily responsibilities. In spring of 2020, the COVID 19 pandemic was upon us. In retrospect, this was a great opportunity for SUNY Poly to be creative in the virtual landscape to recruit and enroll students. Today, we still utilize some of these features including virtual One-on-One appointments and previously created content for virtual tours. We are in a very successful place for undergraduate admissions, but there is much more untapped potential.

**Future of SUNY Polytechnic Institute with Slate as your Official CRM**

There is a great deal of Slate functionality that is in store for SUNY Poly. As we have grasped how Slate was built for undergraduate admissions office, we are starting to explore the graduate admissions office. SUNY Poly has their own in-house BannerWeb application for students to apply. I am currently building a new Slate hosted application framework within our Slate database. Their admissions process currently is very manual. This includes manual processing of applications and manila file folders. Once developed and implemented, resources from the graduate office can be utilized elsewhere to empower users and productivity.
“Roadmap” for Advancing Slate on Campus

There are no one-size fits all when creating a CRM for other campus partners. The theory on being successful is assembling a core Slate team (Assembling the core slate team - Slate Knowledge Base, 2023). A core Slate team starts with a “Slate Captain”. Typically, this would just be one captain due to the size of SUNY Poly. I believe choosing the right captain plays a key role in building successful operations and who can lead the transition during implementation. Slate follows a “train-the-trainer” implementation model. The Slate Captain actively takes responsibility for creating supportable business processes within Slate and provide training to other users on campus. They should be knowledgeable in areas such as student success and advise others who understand current processes and how they traverse. Some examples are caseload management, reporting, analytics, communication, and record/event management. I believe with my experience expanding 12 years at SUNY Poly, and 4 years in Slate, I can be a successful captain for this institution.

There are other key stakeholders needed to make SUNY Poly a premier institution. Other essential staff that may be asked to support particular phases during the transition to Slate would be the following:

<table>
<thead>
<tr>
<th>Roles in Slate</th>
<th>Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership Team</td>
<td>VP of Enrollment, Deans, Directors</td>
</tr>
<tr>
<td>Outreach Team</td>
<td>Communications and Marketing</td>
</tr>
<tr>
<td>Integration Team</td>
<td>IT Staff</td>
</tr>
<tr>
<td>Slate Users</td>
<td>Counselors, Advisors, Primary Users</td>
</tr>
<tr>
<td>Other Areas</td>
<td>Third-Party Vendors</td>
</tr>
</tbody>
</table>
The first year will be defining key operations and setting priorities for success, which includes developing a clear plan for accomplishment. But once implemented, effective governance is important to ensure proper maintenance.

**Resource Savings with Slate**

As demonstrated earlier, Slate has the ability to eliminate third-party software’s such as Signal Vine and MyEmma. Thus, saving money and resources to maintain those additional software platforms. The real benefit is having one system to do everything is consistent communication, accurate data, and saving time and money. Besides the third-party benefits, Slate has the ability to eliminate certain jobs that are still manual and need an employee to operate. Nearly 80 percent of surveyed respondents said their campus has more open positions this year, than last, and has been more difficult to fill those jobs (Zahneis, 2022). For instance, we are lacking professionals in the IT department and are not receiving any qualified candidates.

Luckily, Slate is not a conventional IT project for setup and implementation. Slate was designed and built for utilization of the primary users of the system. Ninety-five percent of the tasks related to implementation are focused on business process that can be completed directly by the Slate captains without the involvement of IT staff. One last additional benefit or cost savings is that all licenses to Slate include all features and functionality. Other CRM software’s, you would have to pay for additional “Add-ons” to get specialized features.

**Untapped Potential to Become Premier Users of Slate**

There are a number of process that can be built into Slate that can empower the users and the staff. The following is some untapped potential:

- AI Chatbot & Live Agent Chat
- Customized Integral Portals (Alumni, Coaches, School Counselors)
• Early Alert Systems
• Risk Management
• Track Student Lifecycles
• Alumni & Advancement
  ▪ Create Unlimited Giving Forms
  ▪ Communications
  ▪ Personalized Call Campaigns
  ▪ Donor Portal & Alumni Directory
    o Personalized Giving Days

By having a Slate captain at SUNY Poly, we can empower staff in many different areas on campus to personalize the experience for a student and support student success.

Conclusion

Slate is a powerful all-inclusive CRM software that is designed and developed exclusively for higher education. It is not a conventional IT project that needs IT personnel to maintain and develop for users. In fact, it was designed and built for those who will be primary users of the system. Ninety-five percent of the tasks related to implementation are focused on business processes and can be completed directly by a Slate Captain(s). Slate has the ability to become SUNY Poly’s primary CRM for multiple areas on campus. I believe we need to have a Slate Captain to help drive success and implement processes for campus partners to provide a better customer experience for students, faculty, staff, and alums. I recommend that each area of implementation has a user of Slate that will have the knowledge base and tools to be successful. Slate has already demonstrated that we can save time, money, and resources when implemented
properly. It can also create a unique customer service experience that can be useful and knowledgeable to those end users while empowering the Slate user. This is why, Slate should continue to be our official CRM for SUNY Polytechnic Institute.
References


WHAT ARE THE MAIN BENEFITS YOUR BUSINESS HOPES TO ACHIEVE USING CRM?

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve customer service</td>
<td>74%</td>
</tr>
<tr>
<td>Improve customer satisfaction</td>
<td>66%</td>
</tr>
<tr>
<td>Improve customer retention</td>
<td>56%</td>
</tr>
<tr>
<td>Increase sales</td>
<td>54%</td>
</tr>
<tr>
<td>Generate new business</td>
<td>53%</td>
</tr>
<tr>
<td>Ability to share and distribute data</td>
<td>48%</td>
</tr>
<tr>
<td>Market products &amp; services more</td>
<td>37%</td>
</tr>
<tr>
<td>Improve market intelligence</td>
<td>29%</td>
</tr>
<tr>
<td>Manage customer renewals</td>
<td>24%</td>
</tr>
<tr>
<td>Reduce costs</td>
<td>24%</td>
</tr>
<tr>
<td>All of these</td>
<td>8%</td>
</tr>
</tbody>
</table>

Figure 2

technolutions

- 96 of the top 100 national universities
- 25 of the 27 Association of Jesuit Colleges & Universities
- 58 of the 65 Association of American Universities
- 145 of the 148 member institutions
- 16 of the top 25 best B-schools
- 650+ of the 1,000+ member institutions
- 41 of the 44 CTCE
- 96 of the top 100 liberal arts colleges
- 10 of the BIG
Figure 3

Top Industries that use Technolutions Slate

Distribution of companies using Technolutions Slate by Industry

- Higher Education: 475
- Education: 32
- Hospital & Health Care: 6
- Information Technology: 4
- Marketing and Advertising: 4
- Primary/Secondary Education: 3
- Computer Software: 2
- Music: 2
- Writing and Editing: 1
- Political Organization: 1
RESEARCH
JOURNAL

IDT 599 - CAPSTONE
BY: AARON SWANCOTT
Research #1
Freestorming Session
With: Alyssa Steele
Coordinator of Enrollment Marketing
Freestorming Session

Research #1
February 1, 2023

Overview of potential Study:

A. Intended session:

As a college admissions advisor for the past 12 years, I have had the opportunity to observe how SUNY Polytechnic Institute's (SUNY Poly) undergraduate admissions office has previously operated without the use of a Customer Relationship Management (CRM) software. In 2011 when I first starting working at SUNY Poly, I was introduced to many third-party software programs to complete the task at hand. Programs such has Banner, Argos, Discoverer, Campus Connect, Document Management and others to utilize data analytics and document reporting. We also used general email with canned responses to communicate with students. Currently, I have designed and implemented Slate and fostered growth within admissions over the past 3 years. It has revolutionized the way we think and process applications.

B. Why do a freestorming session:

A Freestorming session allows myself and a participant to think and write about anything and everything that comes to mind. Typically, you find a quiet place and allow yourself to completely immerse in freestorming. My participant that freestormed with me is Alyssa Steele who is the Coordinator of Enrollment Marketing at SUNY Poly. Alyssa also has hosted many freestorming sessions and she facilitated by writing all of my ideas down for this project. We used a giant whiteboard and wrote out our topics, structure, and processes to complete the task at hand.

C. Relationship to the participant(s):

Alyssa has been a co-worker of mine for over the past year. She also is an adjunct professor at SUNY Poly and teaches COM 307. She has a Master’s of Science in Student Affairs Administration and has hosted many freestorming sessions at SUNY Poly and SUNY Oswego.
D. The data was collected and analyze:

Once we completed this session, I then broke down all the ideas to form a topic. Once I had a topic, I started identifying my research methods and partners to gain an expert understanding about Slate. Once I have all the research findings, I can create a project to show college presidents why Slate should be your college’s official CRM.

E. The significance of this process:

In order to know where to go, sometimes you have to know where you came from. A session like this helps me get all of my thoughts out so I can begin organizing them to create a smooth project. Without this freestorming session, I believe my thoughts would be over the place regarding my topic.
Research #2
Delphi Method - 1
Surveying Slate Knowledge Base

Briefing a New Incoming President about Slate

Aaron Swancott
Assistant Director of Admissions Operations, SUNY Polytechnic Institute
Thursday at 09:48

My capstone project is to prepare a briefing for our new incoming President on why we should keep Slate as our official CRM (not comparing this to another CRM). I am hoping that you Slate experts could provide me some advice on what you think are the most important messages about Slate? I appreciate any feedback!

Comments

Matthew Schieren, Community Moderator
Assistant Director of Technology Operations. The University of Chicago
Thursday at 13:59

Hi Aaron Swancott,

I've not had to make a pitch like this before, so I take my words with a grain of salt. FWIW our school has been on Slate for 12+ years, and I've worked in it for almost 11...

Why you should keep Slate:

Slate is the 'Google' of admissions systems. It's extremely flexible and constantly being updated and improved with input directly from the community itself. While this may cause heartburn for some IT folk, it's arguably better than the alternative big-box systems which rarely introduce major changes and instead just iterate on the same basic software platform that's been in use since 1999.

With that being said, you do have to put on your work boots and build it yourself. There's no real out-of-the-box setup that exists with, it's all based on what you make of it. Because of this, it's much more friendly and interactive than other systems and Technologies is constantly striving to make Slate easier to use so that you don't need a degree in computer science or several years of coding knowledge to run the system. (Former art-school grad here).

Best,
Research #2

Delphi Method - 2

Super Slate Technolutions (Facebook)
Survey-Based framework:

A. Intended study:

I have only been a Slate super user for 3 years. At SUNY Poly, I had designed and implemented everything and try to empower my coworkers to be super users as well. Unfortunately, I am great at what I know which is now hindering my performance to expand my knowledge of Slate and spread it across SUNY Poly campus partners. In order for me to gain more knowledge about Slate, I adopted the Delphi method. The Delphi method is a technique where you can ask a survey-based question to help systematically process a prediction using collective opinions for other members. Slate was developed and introduced in the year 2000, so I knew there are users out there that have more than 3 years of experience to help gain a foundation of knowledge about Slate.

I do not have a social media presence. For my experiment, I created a Facebook and joined a group called “Super Slate Technoutions Friends”. On this group, I was able to survey my question and have Slate super users to comment. I was also able to do this on the Slate Knowledge Base where only Slate users can assess as well. I gave each survey question 2 weeks in time and allowed me to respond and have these users elaborate their answer.

B. The Research Question:

I used this opportunity to pitch myself. “My capstone is to prepare a briefing for our new incoming President on why we should keep Slate as our official CRM. I am hoping that you Slate experts could give me some advice on what you think are the most important messages about Slate?”

C. Relationship to the participant(s):

I have no personal relationship with the participants. These were just good people with lots of Slate knowledge who commented on my post.
D. The data was collected and analyze:

The primary data will come through these 2 focus groups. The qualitative and anecdotal information provided me with the foundation of this study. Besides having the users tell me all the Slate features, they discussed more about the accuracy of your data. I also found an understanding of how some institutions eliminated third party contracts because they moved those processes to Slate.

I felt like the feedback was honest and truthful. Feedback like Slate is the “Google” of admissions systems and that data feels “100% accurate” is the feeling I have when using Slate. Slate’s functionality and architecture, allows you the ability to expand beyond the undergraduate admissions office.

E. The significance of this process:

Because we are in what I called the “Rookie” years of Slate, the Delphi method allowed me to reach out to those who have been using Slate for many years a formulate an outcome of why Slate should be your official CRM for your college institution.
Research #3

Qualitative Research Method - 1

With: Tyler Lowell
Associate Director of Admissions Technology and Research
Research #3
Qualitative Research Method - 2

With: Maryrose Raab
Associate Vice President for Enrollment Management
Research #3
Qualitative Research Method - 3

With: Andrew Russell
Officer-in-Charge
Qualitative Research Method

Research #3
March 1 – March 31, 2023

Interview for Fundamental Research

A. Intended study:

The intent of interviewing these participants was to gain knowledge in three different areas. The first area of study was to interview someone that has over 9 years of experience and was once the first user of Slate in the SUNY System. Understanding how other SUNY institutions are using Slate and why they still use it today. The second area of study was to interview someone who has many years of admissions experience. I gained a tremendous amount of information about how the undergraduate admissions offices use to operate to how they operate today. The last area of study was to interview someone who has a “birds eye view” of someone who may be in a situation to make Slate your official CRM. For these purposes, I used a phenomenological study to understand their beliefs, experiences, behaviors, and interactions to gain qualitative research.

B. The Research Question:

Each research question(s) for the three participants were different. The first was Tyler Lowell, who was one of the first Slate users at SUNY Binghamton. His questions where, “How did Binghamton operate having Slate as their first CRM?” Then Tyler transitioned to SUNY Systems and was part of the RFP process to help SUNY contract with other SUNY schools. He was an integral part of helping other SUNY schools such as SUNY Poly adopt Slate as their first CRM. Tyler now works at the University of Albany where they have had Slate for over 6 years now. “How do you effective communicate technology to non-technology users? What is your return on investment (ROI)?”

Maryrose Raab has been in higher education for over 20 years. Working in undergraduate admissions from 1991 to 2008, I had the opportunity to understand what the admissions life was like without a CRM. My focus was to ask her questions that make admissions then seem so archaic, to where we are now as an institute with the CRM Slate. Also, Maryrose is the Associate Vice President for Enrollment Management and is in a position that would support my proposal on why we should keep Slate as our official CRM. I wanted to find out what are some of her goals for the future of Slate and what she thinks we need to become a premier user of Slate at SUNY Poly.
Dr. Andrew Russell who is currently SUNY Poly’s Officer-in-Charge has the most birds eye view on someone in a decision-making process to inform a business decision on whether to keep our contractual obligation with Slate. “If I was to present Slate to a college president, what do you think are some key components to help you make the most informed decision to keep Slate? What might be the best approach to advocate Slate?”

C. Relationship to the participant(s):

Tyler Lowell – I have known Tyler for about 6 years now and I believe he is an expert Slate user. Tyler started at Binghamton University where Binghamton was the first SUNY users of Slate. He then transitioned to SUNY Central where he played a role in getting over 20 more SUNY schools onboarded with Slate. He then transitioned to University of Albany where he has created a more data driven position to help enrollment. Tyler was contracted by SUNY Poly to help implement and onboard myself as a super user of Slate at SUNY Poly.

Maryrose Raab – I have known Maryrose since the day I started back in 2011. She became the VP for Enrollment Management around 2018 and has vital knowledge of how undergraduate admissions has been revolutionized.

Dr. Andrew Russell – I have known Andy for roughly 4 years when he was SUNY Poly’s Dean and professor of the College of Arts & Science program. He was appointed Officer-in-Charge in December of 2022. He has the most senior leadership at SUNY Poly and was an amazing opportunity to interview someone in that highest most level.

D. The data was collected and analyze:

In my phenomenological study, conducting these interviews was an important part to validate Slate as your official CRM. I got to learn that Slate is user friendly and more efficient. It also helps with saving resources that some institution cannot hire for (such as IT). Other CRM may need a lot of IT support or someone with an IT background. I collected information on how admission offices operated without a CRM. Their archaic styles are what has introduced Slate as your one stop shop. As SUNY Poly searches for its next college president, it was a perfect opportunity to interview someone who I have had a relationship with and giving answers on what he thinks a president would like to know about Slate.
Qualitative Research Method

E. The significance of this process:

I found that this process was a key part to why you should have Slate as your official CRM. I gained a lot more knowledge of SUNY Poly and its admissions processes before I was hired in 2011. I also gained a great deal of knowledge in putting together where SUNY Poly needs to be in the future to become a premier user of Slate.
Slate is something I am passionate about and is designed and developed exclusively for higher education. With having 3 years invested entirely into Slate, I may be bias when I believe it’s the best CRM out there. My research shows that our competitors are changing CRM to Slate as well. In the ever-changing world of admissions, we need to stay ahead of our competitors to grow enrollment and retention. We can advance Slate into other department and create a functioning Slate team.
As the data mentioned before, themes are beginning to take shape.

Here are my 12 theme list:

1. **Slate Features:** Build forms using drag-and-drop form builder, add user-configurable conditional logic, embedded forms, ect all with direct integration back to a person’s record. A “Timeline” shows everything that has been communicated out by Slate.
   a. All licenses to Slate include all features and functionality. No add-ons.

2. **Data Analysis:** A centralized actuate software to review and manage all interactions, communications, applications, gift donations, test scores, relationship and materials on one platform.
   a. Any Data Point. Anytime. Powerful query builders without the need for IT assistance.

3. **Events:** Ability to create, schedule, and invite attendees to events. Event templates lets you create recurring events without the need for additional configurations.
   a. Badge Printing & Mobile Passes. Badges are automatically downloaded to a scanning host machine for high-speed printing.
   b. Communication is automated to be triggered upon registrations, hours before and after events within Slate using SMS, print, or email. Automatic check-in for accurate data.

4. **Customized Communication:** Connect with your audiences via fully-integrated text messaging, email, voice, social media, and print communications. Dynamic Marketing Automations. Set it and forget it.

5. **Automations and Integrations:** Many institutions transfer data bidirectionally between Slate and their SIS—and other databases as needed. Data is transferred via SFTP.
   a. Automate Anything by building a wide range of business rules to automate and support college processes and operations with rules editor.

6. **Application Review:** Automate Read & Review Process. Ability to review applications at anytime, anywhere with Slate Reader.

7. **Portals:** Custom student status portal so applicants can manage their checklist. Increase completion rates.

8. **Travel:** Trip allows for aggregating of multiple events, applicant interviews, notes, and even flight information in a one-stop environment. You can also create heat maps of where you are getting applications from to specifically target smart recruitment territories.

9. **Home Grown Applications:** Supports multiple application frameworks in a single database. Collect any supporting documentation, including school transcripts, test scores, activities, etc in one-stop database.

10. **Resources:** Slate Knowledge Base provides comprehensive documentation, training videos, and webinars on Slate’s features and functionality.
    a. Community Forums where Slate users ask questions, share tips, and discuss best practices.
    b. Slate Feedback is where users can suggest, discuss, and upvote community ideas for consideration in future releases of the ever-evolving platform of Slate.
The conclusion of Slate is that we know all the capabilities of Slate, but how can SUNY Poly reach its untapped potential. My research is making me believe that institutions should have a primary Slate user who creates an onboarding process for new employees in different departments. Those users can empower their department and create more opportunities to create that untapped potential to become SUNY Poly’s premier public institution in Slate.