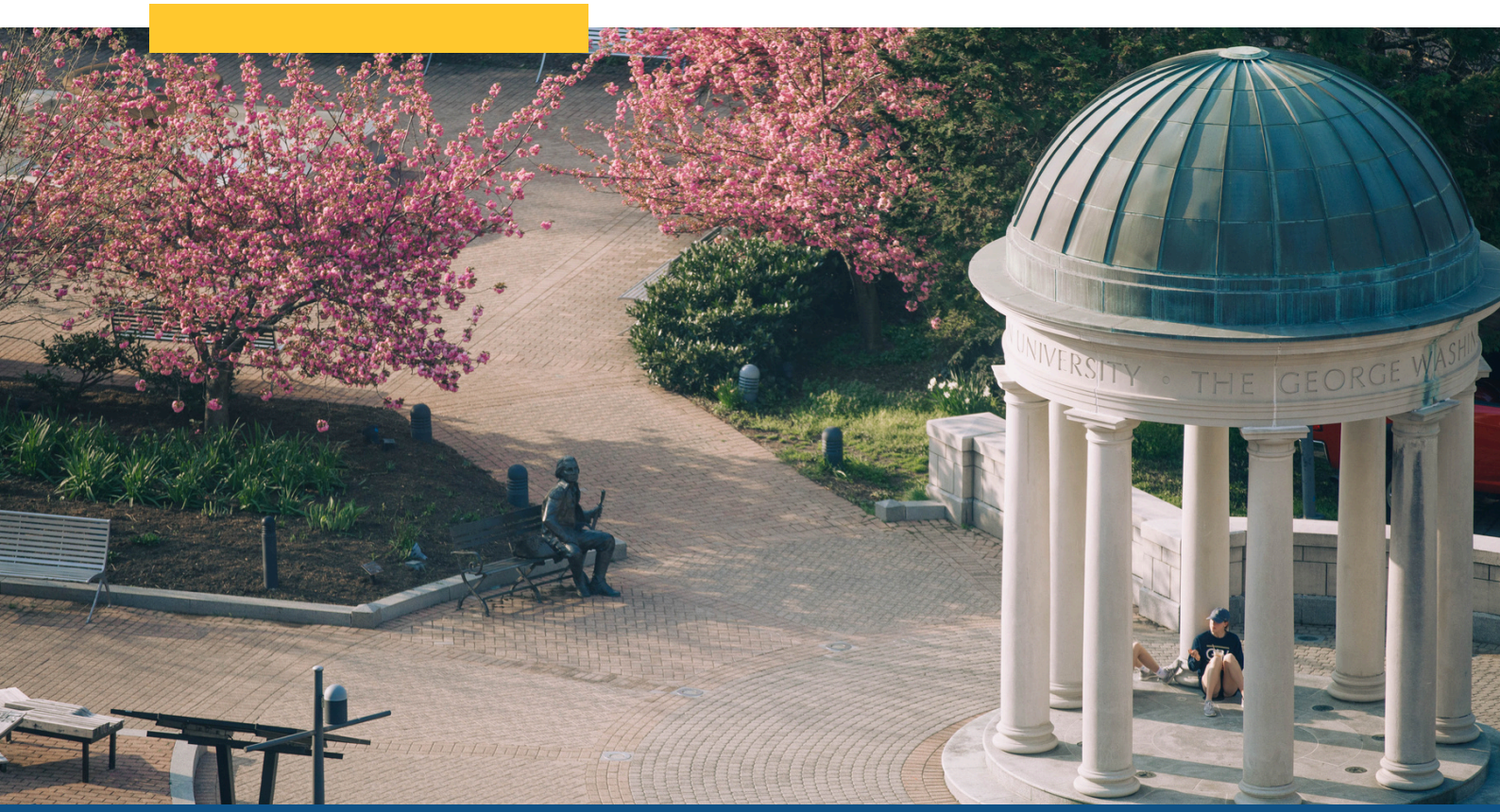
SLATE IMPLEMENTATION

APRIL
2024

SLATE ROUNDTABLE



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SLATE CRM IMPLEMENTATION

Slate will manage domestic and international, undergraduate and graduate, non-degree and online students. The implementation will take place in two phases; Phase I from 2023-2024, and Phase II from 2024-2025.

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SLATE IMPLEMENTATION

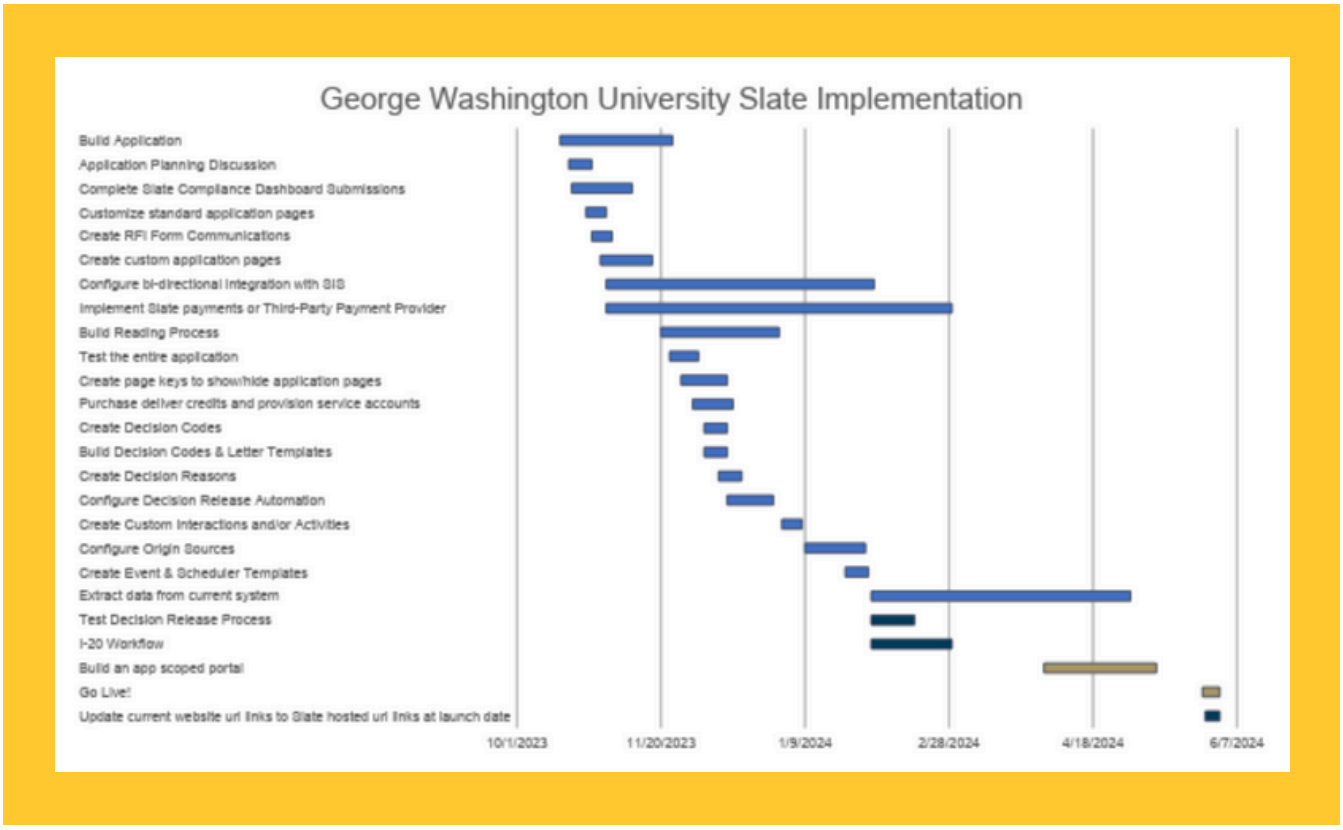
APRIL UPDATE

In a March 2024 roundtable meeting, the Slate Implementation inner core team (Kimberley Williams, Diana Dahl, Brittany Kemmer, Kashmira Mehrotra, Mira Smith, Tyson Brown, Jeanne Fiander, and Mark DeLong), reflected on Phase I of the project and the impact Slate is going to have here at GW. The purpose of a roundtable discussion is to facilitate an open exchange of ideas, opinions, and perspectives among participants on a particular topic or issue. Unlike a formal presentation or lecture, a roundtable discussion encourages active participation and collaboration among all participants, creating a more interactive and dynamic environment. This report includes highlights from this meeting.

BRINGING IDEAS AND INNOVATION TO LIFE THROUGH TECHNOLOGY

PIPELINE-CENTRIC SYSTEM IMPLEMENTATION

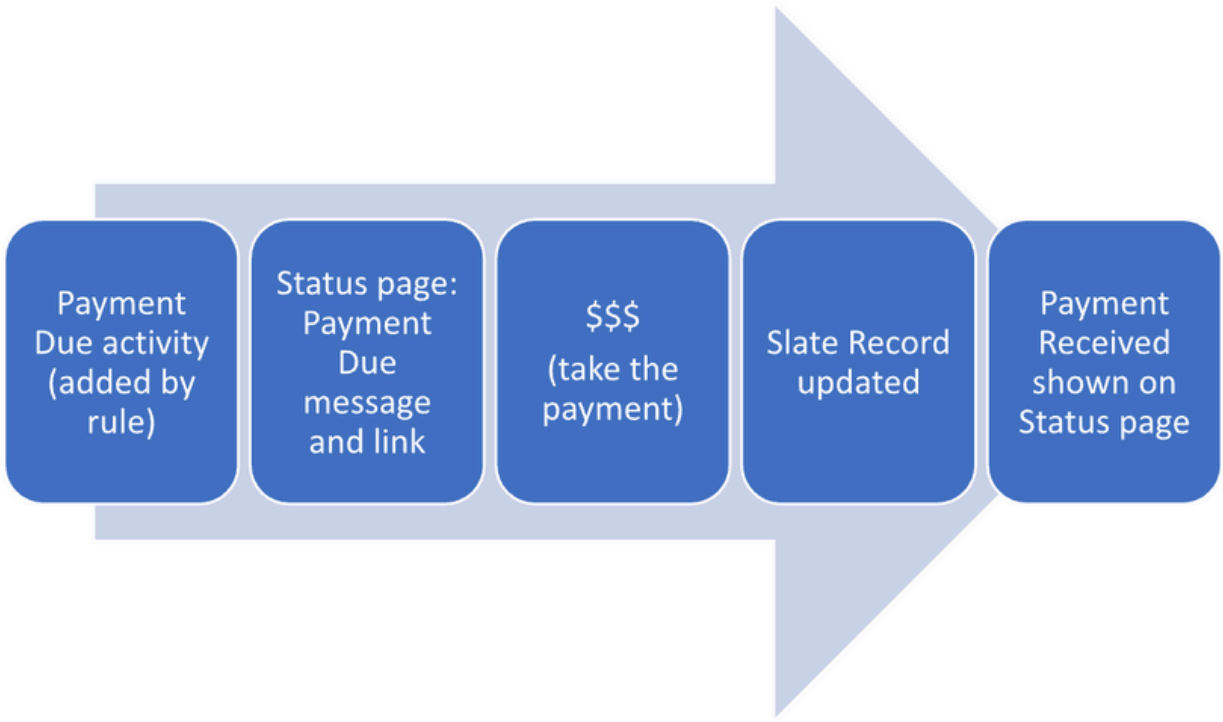
This project has been described as “pipeline centric”. A pipeline-centric system implementation design refers to an approach in software development where the focus is on constructing and managing workflows or pipelines to facilitate the efficient execution of tasks or processes. This design pattern is commonly employed in systems where there is a need to process data or perform operations in a sequential or parallel manner; see phase I approach below.



IMPLEMENTING A NEW STUDENT PAYMENT SYSTEM

Slate will allow incoming students to pay their deposits directly through the application system via their application portal enhancing the student experience which is so important. This change was deemed necessary due to the level of complexity of the current process of setting up GWeb accounts. When paying the deposit in GWeb, applicants had to go to multiple portals, which was not ideal customer service. The new system is also expected to provide real-time updates in the CRM.

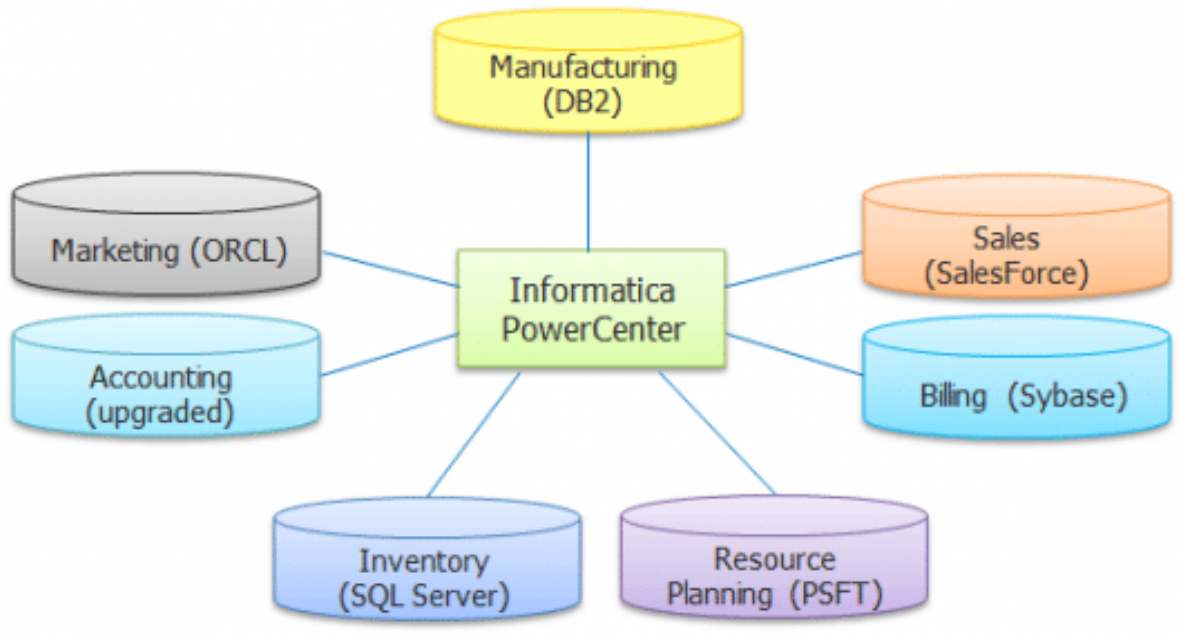
The implementation of this new system will be a significant change and a step towards a more user-friendly process for applicants.



DATA INTEGRATION (OLD WAY)

UGA ONLY

In addition to eliminating the need for Perceptive Content (PC22), Slate will eliminate the need for the software Informatica. Informatica, over the years, has been the leader in data integration technology. GW has been one of over 5,000 customers using Informatica for data integration. Below is an example of how some businesses use Informatica.



BENEFITS AND LIMITATIONS DISCUSSED

IT IS NOT ENOUGH TO BE BUSY, SO ARE THE ANTS. THE QUESTION IS: "WHAT ARE WE BUSY ABOUT?"

-HENRY DAVID THOREAU

Slate will allow many users to work smarter, not harder. For example, Slate will help separate records, reduce overlap, and ensure cleaner data ownership. In addition, using Slate will reduce duplicates, especially for returning applicants. It is important to note architectural differences between Slate and Salesforce (i.e., need for a recruitment entity in Graduate Slate). The shift to Slate will ultimately enhance efficiency, provide a better experience for all offices, and allow for more rapid changes.

We've built the recruitment entity in Slate to replicate and further build upon some functionality that previously existed in Salesforce. Entities provide the flexibility to create these custom tables for any scenario of grouped data points. Entities are custom-built data tables that are exclusive to your database and process.

ABOUT ENTITIES

- **Scope & Display** - Entities can be created for and displayed on person records, application records, or dataset records. These data are displayed as a table on the record using **custom tabs** and an **entity widget**.
- **Multiple entries of similar data** - Entities store multiple entries of similar data. Each entry is a "row," and the collected data points are the "columns."
- **One-to-many data** - Entities are used to store one-to-many data on records. For example, a list of the scholarships received by a student, or a list of their past schools attended.
- **Merge Fields & Queries** - Entity data can be used as merge fields and query exports to display dynamically in other ways.

A few examples for using an Entity include:

- Scholarships
- Class schedules
- Courses
- Programs of interest

SLATE SYSTEM: ACCESS AND PERMISSIONS

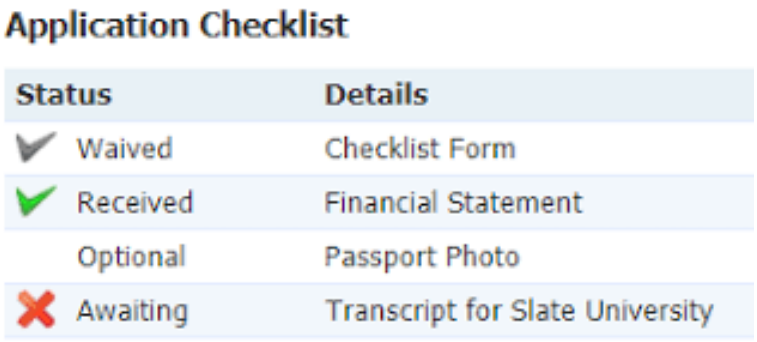
SLATE BENEFIT

With Slate, we won't face the same license limitations and can extend access to more users without concern. Additionally, Slate functionality provides detailed user roles and permissions that will allow users to see only the information that is relevant to their role. This will enable users to have a focused view of information while preventing data security concerns.

User access to records in Slate is determined by permissions granted to the user. Users can be granted read and/or write access to all records in the database, or access can be granted to records enrolled in a specific population(s). Individual records can also be protected such that only specific users can access the record in Slate.

PORTALS

Slate will improve the student experience and provide better visibility across offices, which will be especially beneficial for the Admissions office. With Slate, checklist items will be uploaded, processed and displayed to applicants all in one system, which eliminates a number of integrations along with their limitations and weaknesses, and allows applicants to see the most accurate view of their checklists with minimum delay, if any. See illustration below:



Application Checklist

Status	Details
Waived	Checklist Form
Received	Financial Statement
Optional	Passport Photo
Awaiting	Transcript for Slate University

This checklist is dynamic and will change as the applicant status changes - upon admission, new checklist items may appear that allow the applicant to deposit and enroll. In UGA, during Phase II, we will also be creating a portal for parents, which will allow them to track student progress. For UGA only, at the end of Phase II, applicants will be able to see a Financial Aid checklist. See illustration below:

Admissions | Financial Aid

Financial Aid Checklist

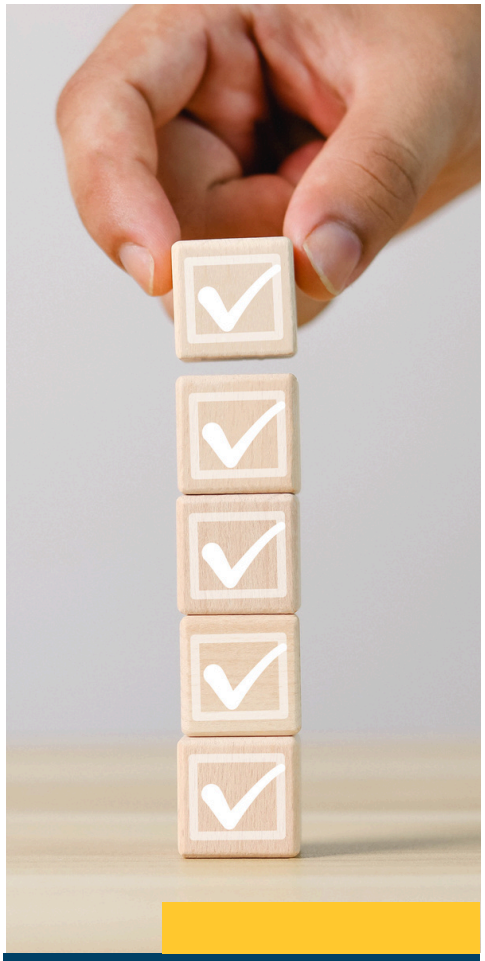
Status	Details
Received	CSS Financial Aid Profile
Awaiting	Non-Custodial Profile
Received	Parent(s) Prior Year Federal Tax Return
Awaiting	Parent(s) Prior Year W-2

COUNSELOR PORTAL

UGA ONLY

"Slate.org is an extremely helpful and convenient way to monitor the progress your students are making with their applications. I especially appreciate the convenience of being able to update applications with official school records if anything needs to be submitted urgently."

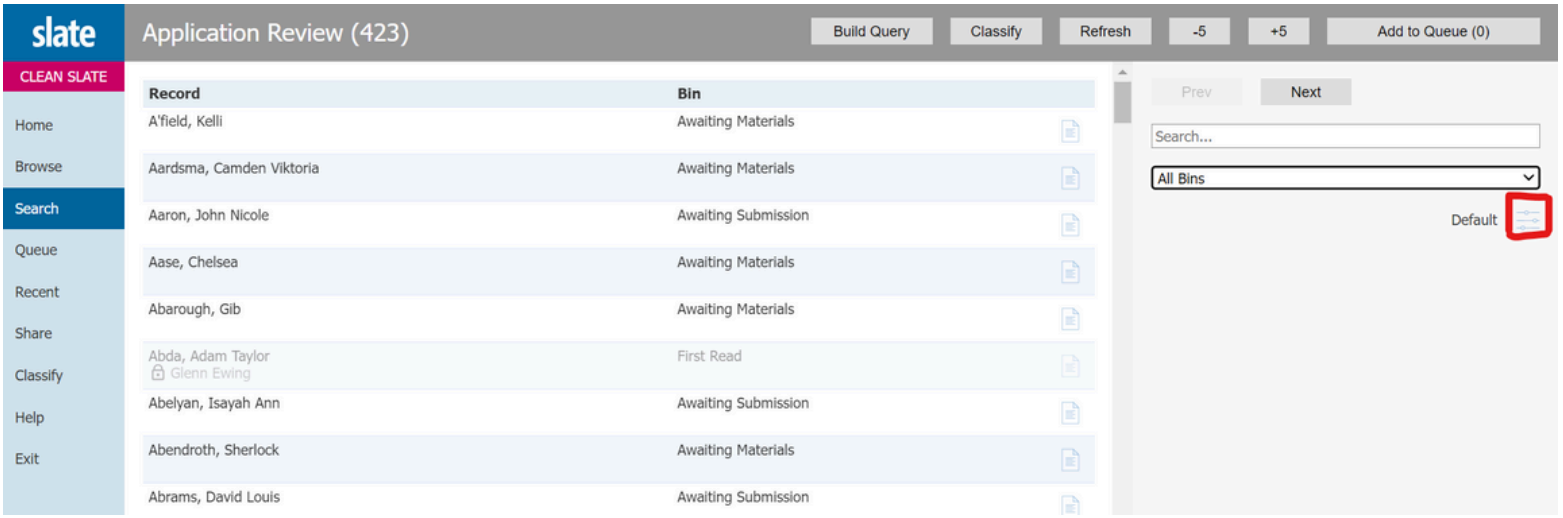
~Christopher Miller, Sandy Spring Friends School



Through Slate.org, a counselor portal, applicants' school counselors can see status updates and upload necessary documents. Slate.org will include an ability to view the checklist, application decisions, applicants' recently attended events, and a document upload function to aid applicants in completing checklists. These features will enhance their operations and reach, and aid high school students in completing tasks in a timely manner.

AUTOMATION IN DECISION-MAKING PROCESSES

In this implementation, we have incorporated automation into the decision-making process. Reader Bin Movement Rules will move the application into the specified Reader bin. See a few visuals of the process below.



IMPLEMENTING PING FOR STUDENT ENGAGEMENT

We will be implementing Slate's Ping feature. This is an online behavioral tracking tool. With this Slate tool we can track records and engagement on various application pages. See below:

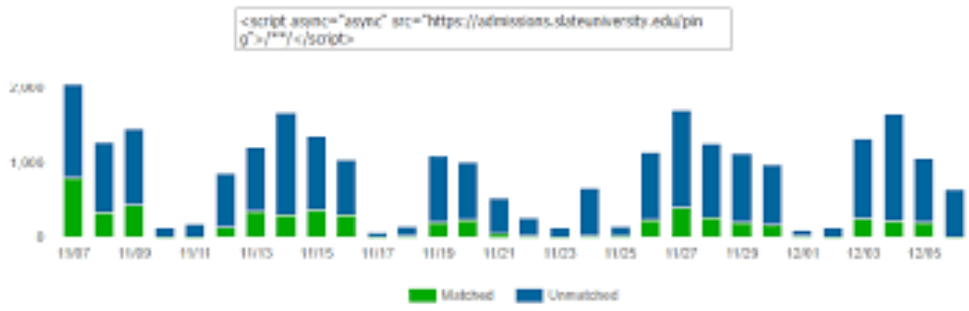
Ping Destinations

Browse destinations captured by Ping by host and URL.

All Hosts / admissions.slateuniversity.edu 11/29/2018 12/06/2018

Path	Count
admissions.slateuniversity.edu/portal	373
admissions.slateuniversity.edu/register	204
admissions.slateuniversity.edu/apply	68
admissions.slateuniversity.edu/share	35
admissions.slateuniversity.edu/account	3

Ping will allow us to see which pages students are visiting (if we are able to match them) and how long they interact with that site.



In addition, Ping can influence modeling of enrollment and application likelihood. This information will tie into and work alongside the recruitment entity and lead scoring for better tracking and understanding of student interest.

Lastly, digital footprints left by prospective college students can be helpful in many ways. Overall, while online behavioral tracking itself doesn't influence the admissions decision, the digital footprint that students leave behind can play a role in informing those tracking funnel metrics.

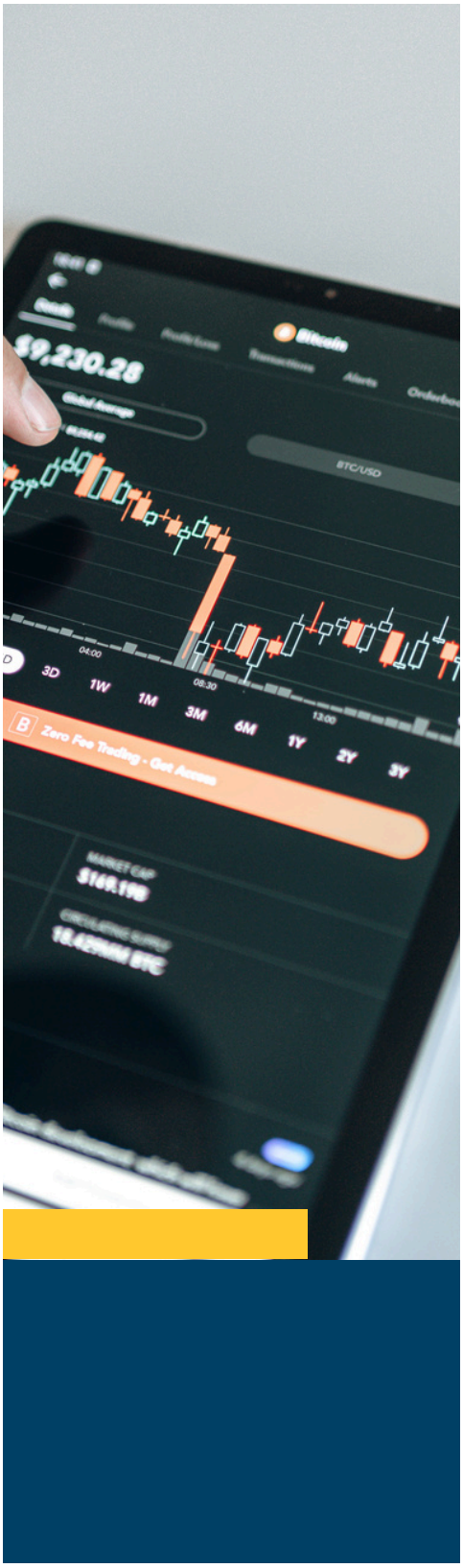
SLATE TEXT MESSAGING, EMAIL, AND OPT OUTS

Slate will improve the process of text messaging. With message groups, prospects have the option of opting out of texting from one office but remaining in texting with other offices. This can also be managed through a portal where prospects are able to configure their program preferences.

CUSTOM DATASETS

Lastly, custom datasets can be created for a number of purposes. Like person records, they can contain custom fields, addresses, devices, and relationships. While Slate's standard datasets are related to schools, custom datasets can keep track of volunteer records, churches, alumni interviewers, community-based organizations, and more.

The creation and maintenance of custom datasets are time consuming processes. Upon creation, they contain almost no features or functionality. Creating a custom dataset is a long-term project that should only be attempted with ample planning time.



USER EMPOWERMENT AND USER GROUPS

It will be important for GW to create both user empowerment and user groups. User groups will play a crucial role in fostering collaboration, innovation, and success in tech projects by providing a supportive community where members can learn, connect, collaborate, and grow together. Specific benefits of user groups include:

KNOWLEDGE SHARING

User groups provide a platform for members to share their knowledge, expertise, and experiences with the technology being used in the project. This can help team members learn from each other, solve problems more efficiently, and discover new ways of utilizing the technology.

NETWORKING

User groups allow individuals with similar interests and goals to connect and build relationships. Networking within user groups can lead to valuable collaborations, partnerships, and mentorships that can benefit the project.

FEEDBACK AND VALIDATION

User groups can serve as a valuable feedback mechanism for the project. Members can provide insights, suggestions, and critiques based on their experiences, helping to validate ideas and identify areas for improvement.

COMMUNITY SUPPORT

Collaborative tech projects often encounter challenges and obstacles along the way. User groups provide a supportive community where members can seek help, advice, and encouragement from others who understand their struggles and can offer practical solutions.

RESOURCE SHARING

User groups often facilitate the sharing of resources such as code libraries, tools, templates, and best practices. This can save project members time and effort by providing access to valuable resources that have already been developed or tested by others in the community.

PROMOTION AND AWARENESS

User groups can help promote the project to a wider audience and raise awareness of its goals, achievements, and contributions within the tech community. This can attract new collaborators, users, and supporters to the project.

CONCLUSION

AS OF APRIL 2024:

As noted, this Slate tool not only addressed limitations and challenges GW faced with Salesforce, but also introduced a range of new and different system functionalities. Stay tuned for more implementation progress updates.

WORK SMARTER, NOT HARDER