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Slate CRM Implementation Phase II

Office for Student Success
November 13, 2024

Implementation Timeline

Slate Draft Timeline

2023	2024	2025

UG and Portal Go Live

Undergraduate Implementation

UG Parent Portal Go Live

Parent Portal

UG Fin Aid Portal Go Live

UG Financial Aid Portal Implementation

Kick off UG & Grad

Student Success Implementation

Build Graduate Instance

Grad Implementation

Grad and Portal go live for GWSB

All Grad and Grad Portal go live
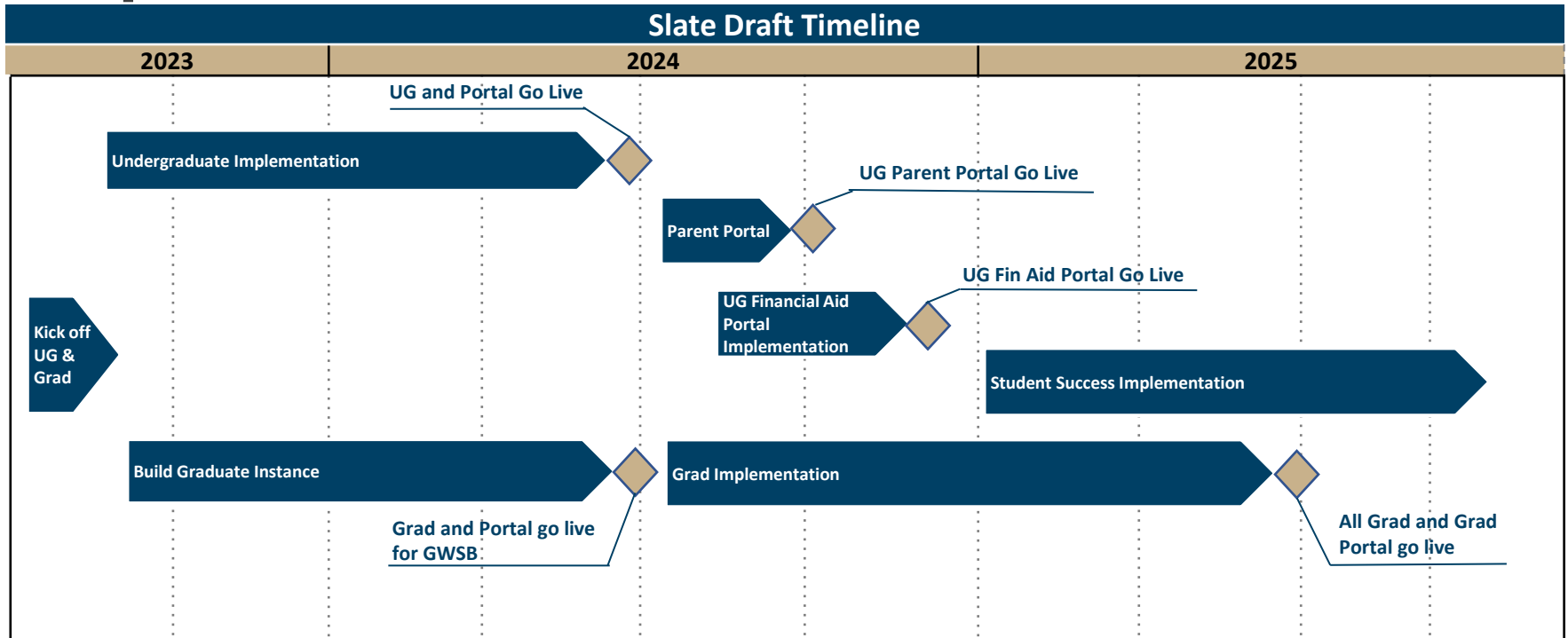
Phase II Implementation (2024- 2025)

July 8, 2024: Graduate Phase II Implementation Project **Kickoff**

July 8, 2024: UG Parent Portal **Kickoff**

August 1, 2024: UG Financial Aid Portal **Kickoff**

End of Fall: UG Prospective Parent Portal **Go-Live**

End of Fall: UG Financial Aid Portal **Go-Live**

March 1, 2025: Graduate Instance **Developed**

June 30, 2025: **Full go-live** for Remaining Graduate Schools/Programs

DEFINE GOALS

Create a path forward by outlining a specific goal that can be measured and keep it in mind when completing requirements.

GATHER BUSINESS REQUIREMENTS

Analyze factors such as what systems you're using, what infrastructure you're working with and the challenges your team is facing.

REVIEW CURRENT SYSTEMS

Don't begin an implementation with the intention of replicating your old processes in a new environment. The goal is to deconstruct your current solution and reconstruct it to an improved one.

CHANGE MANAGEMENT

Migrating to the cloud is both a cultural transformation and technological one. Companies should invest time and resources into preparing the organization for this move.

1 **2** **3** **4** **5** **6** **7** **8**

Gather essentials like test case results, gap analysis and feedback from departments. This will allow you to choose what data you'll migrate, and which processes you'll keep and replace.

Create standard operating procedures, develop a training plan, and participate in user acceptance testing to obtain a holistic view of your organization.

Check to make sure all artifacts and necessary configurations are solidified during deployment. Documents need to be reviewed and reporting needs to be addressed.

Maintaining your new system is an essential part of success. You'll need to complete performance checks, create a budget for overtime staff and ensure your data is backed up.
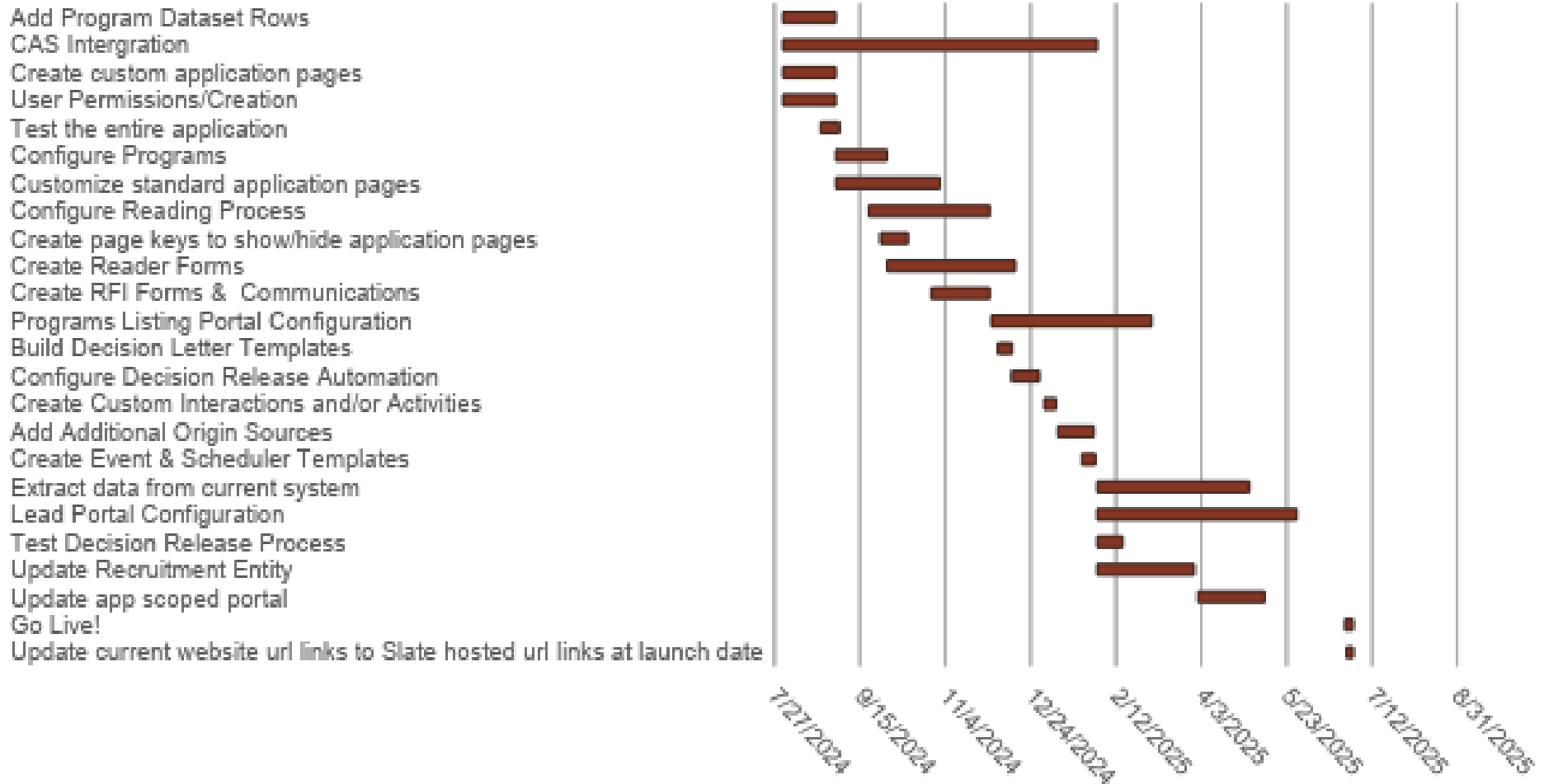
DESIGN

TESTING

DEPLOYMENT

POST GO-LIVE

George Washington University Slate Implementation

Add Program Dataset Rows
CAS Intergration
Create custom application pages
User Permissions/Creation
Test the entire application
Configure Programs
Customize standard application pages
Configure Reading Process
Create page keys to show/hide application pages
Create Reader Forms
Create RFI Forms & Communications
Programs Listing Portal Configuration
Build Decision Letter Templates
Configure Decision Release Automation
Create Custom Interactions and/or Activities
Add Additional Origin Sources
Create Event & Scheduler Templates
Extract data from current system
Lead Portal Configuration
Test Decision Release Process
Update Recruitment Entity
Update app scoped portal
Go Live!
Update current website url links to Slate hosted url links at launch date

7/27/2024   9/15/2024   11/4/2024   12/24/2024   2/12/2025   4/3/2025   5/23/2025   7/12/2025   8/31/2025

Executive Summary

Completed Tasks for the Overall Project:

Our collective efforts have resulted in 89 completed tasks.

Incomplete Tasks for the overall Project:

While celebrating our successes, it's crucial to acknowledge the 131 tasks that still require our attention.

November Dashboards By College
(Week of November 13, 2024)

Public Health

Total tasks by completion status

154
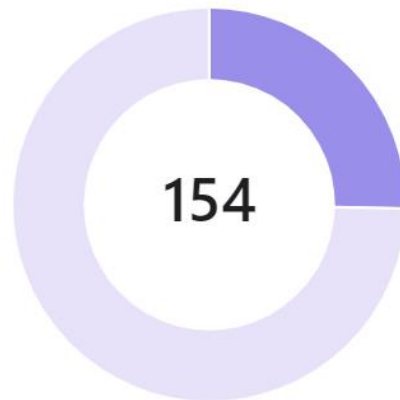
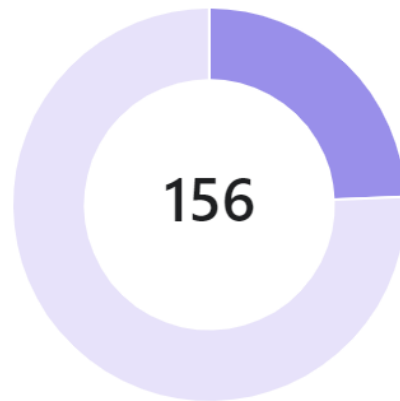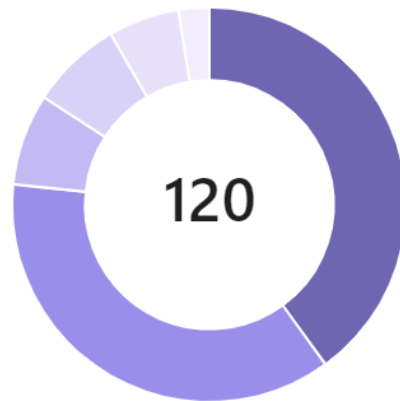Completed: 39 tasks (25%)
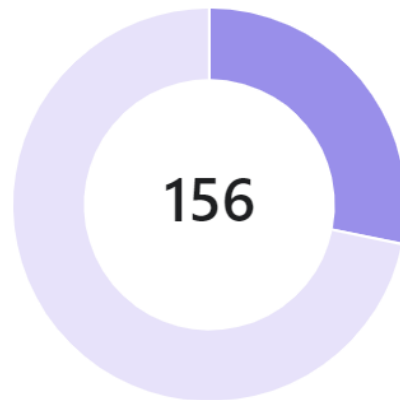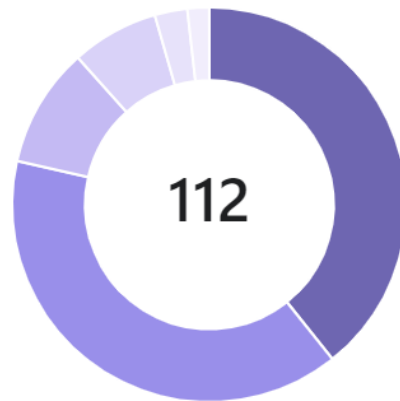
Incomplete: 115 tasks (75%)

Public Health

Incomplete tasks by section
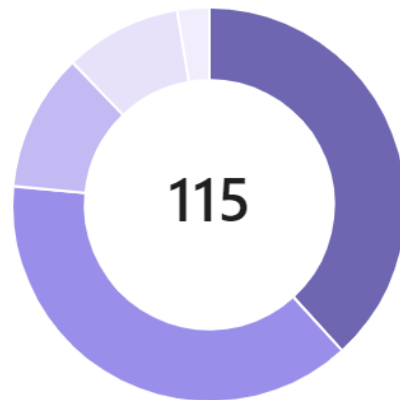
- Backlog of Tasks: 44 tasks (38%)
- Not Needed: 44 tasks (38%)
- In Progress: 13 tasks (11%)
- Done: 11 tasks (10%)
- Resources: 3 tasks (3%)

Center of donut chart: 115

School of Nursing

Total tasks by completion status

156

■ Completed: 38 tasks (24%)

■ Incomplete: 118 tasks (76%)

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School of Nursing

Incomplete tasks by section

118
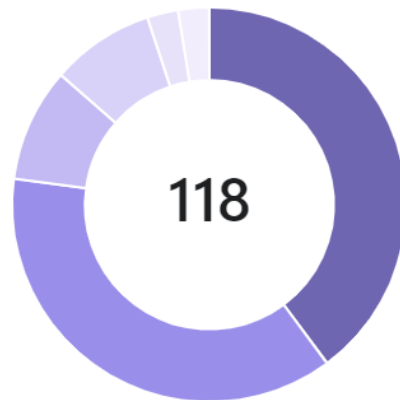
- Backlog of Tasks: 47 tasks (40%)
- Not Needed: 44 tasks (37%)
- In Progress: 11 tasks (9%)
- Done: 10 tasks (8%)
- Resources: 3 tasks (3%)
- To Do: 3 tasks (3%)

Med & Health Sciences

Total tasks by completion status

164
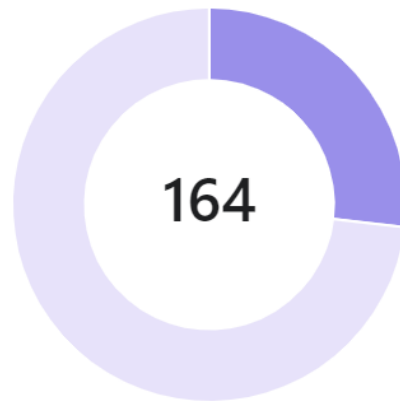
■ Completed: 44 tasks (27%)

□ Incomplete: 120 tasks (73%)

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Med & Health Sciences

Incomplete tasks by section

120

- Backlog of Tasks: 48 tasks (40%)
- Not Needed: 44 tasks (37%)
- In Progress: 9 tasks (8%)
- Done: 9 tasks (8%)
- To Do: 7 tasks (6%)
- Resources: 3 tasks (3%)

Elliot School

Total tasks by completion status

156

Completed: 44 tasks (28%)

Incomplete: 112 tasks (72%)

Elliot School

Incomplete tasks by section

112

- Backlog of Tasks: 44 tasks (39%)
- Not Needed: 44 tasks (39%)
- In Progress: 11 tasks (10%)
- Done: 8 tasks (7%)
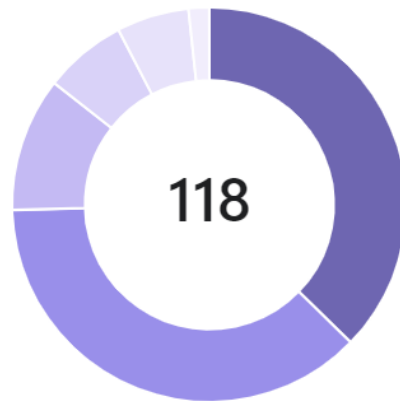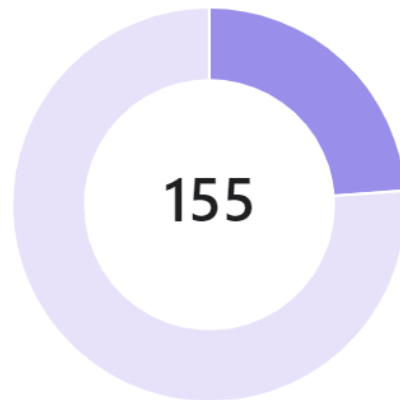- Resources: 3 tasks (3%)
- To Do: 2 tasks (2%)

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Columbian College

Total tasks by completion status

167
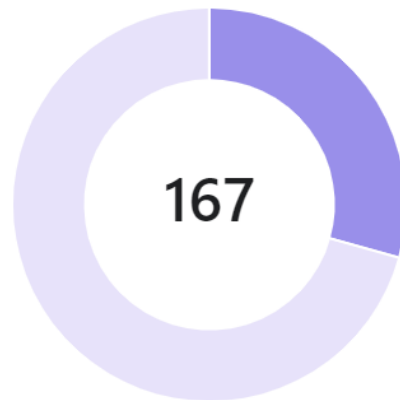
- Completed: 49 tasks (29%)
- Incomplete: 118 tasks (71%)

Columbian College

Incomplete tasks by section

- Backlog of Tasks: 44 tasks (37%)
- Not Needed: 44 tasks (37%)
- In Progress: 13 tasks (11%)
- Done: 8 tasks (7%)
- To Do: 7 tasks (6%)
- Resources: 2 tasks (2%)
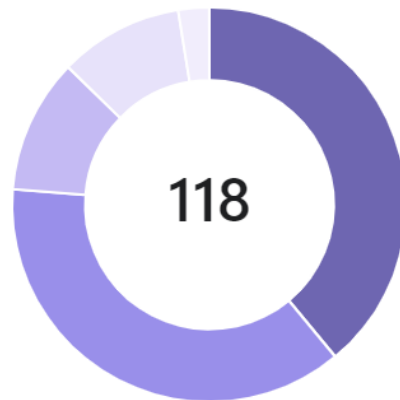
118

CPS

Total tasks by completion status

155

■ Completed: 37 tasks (24%)
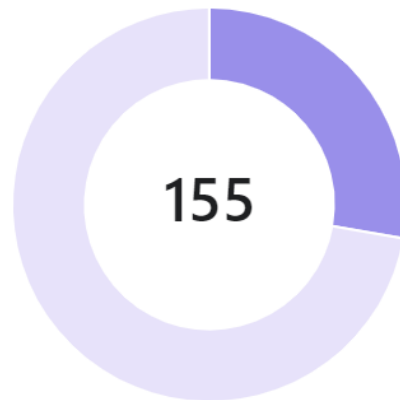
□ Incomplete: 118 tasks (76%)

CPS

Incomplete tasks by section

- Backlog of Tasks: 46 tasks (39%)
- Not Needed: 44 tasks (37%)
- In Progress: 13 tasks (11%)
- Done: 12 tasks (10%)
- Resources: 3 tasks (3%)

118

GSEHD

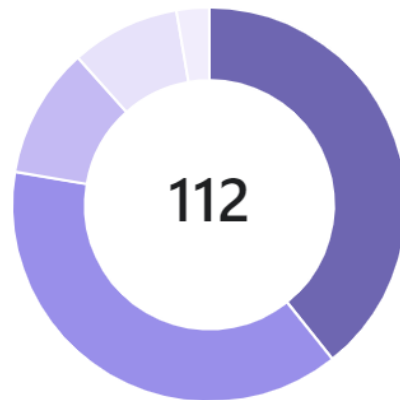**Total tasks by completion status**

155

■ Completed: 43 tasks (28%)
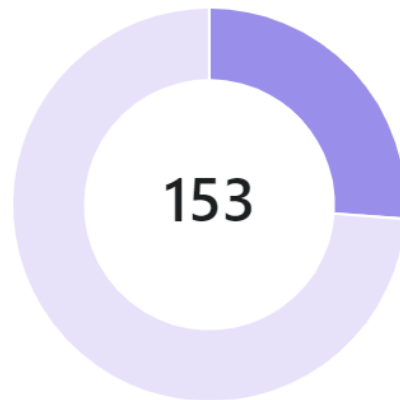
■ Incomplete: 112 tasks (72%)

GSEHD

Incomplete tasks by section

112

- Not Needed: 44 tasks (39%)
- Backlog of Tasks: 43 tasks (38%)
- Done: 12 tasks (11%)
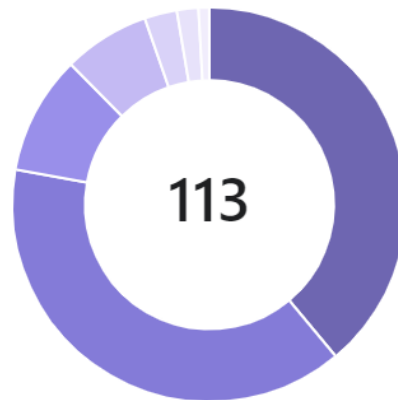- In Progress: 10 tasks (9%)
- Resources: 3 tasks (3%)

SEAS

Total tasks by completion status

153

■ Completed: 40 tasks (26%)

■ Incomplete: 113 tasks (74%)

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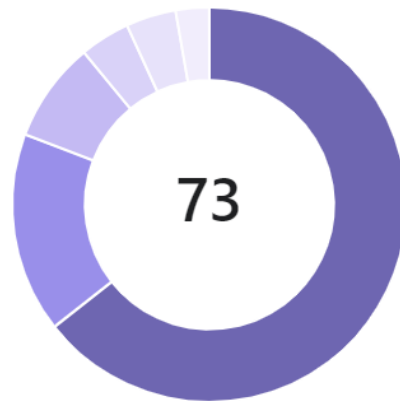WASHINGTON
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SEAS

Incomplete tasks by section

113

- Backlog of Tasks: 44 tasks (39%)
- Not Needed: 44 tasks (39%)
- In Progress: 11 tasks (10%)
- Done: 8 tasks (7%)
- Resources: 3 tasks (3%)
- To Do: 2 tasks (2%)
- Sign-Offs: 1 task (1%)

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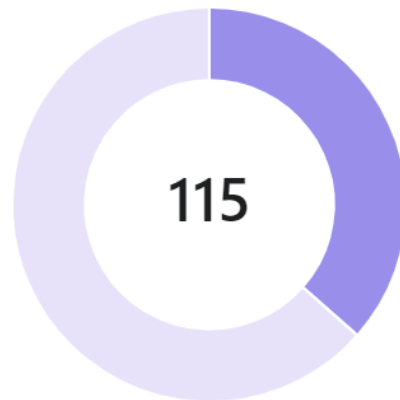WASHINGTON, DC

Pre- College & Non- Degree

Incomplete tasks by section

- Backlog of Tasks: 47 tasks (64%)
- Done: 12 tasks (16%)
- In Progress: 6 tasks (8%)
- Resources: 3 tasks (4%)
- Sign-Offs: 3 tasks (4%)
- To Do: 2 tasks (3%)

73

Pre- College & Non- Degree

Total tasks by completion status

115

■ Completed: 42 tasks (37%)

■ Incomplete: 73 tasks (63%)

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News & Updates

Staffing:

The Senior Slate Administrator (Captain) position will be posted next week. I've been collaborating with HR for several weeks to update this role.

Meetings:

- A refresher meeting is scheduled for **November 22 at 10** am to provide an overview of changes from Phase I.

- Weekly Coffee Chats are scheduled for **Fridays at 2 pm**, starting in December. Once the Slate Captain is on board, he/she will host these sessions.

- Monthly meetings with HCRC will take place on **select Fridays at 10** am to cover topics relevant to all colleges (dates TBA).

Documentation:

- Diana Dahl, who served as the inaugural Slate Captain, is assisting with documenting processes from both Phase I and Phase II and will also support the onboarding of the new Captain. Her continued, focused involvement will be invaluable in ensuring a smooth transition.

On the Horizon

Parking Lot items

- Meetings will be scheduled this month to address important parking lot items.

    - In technical terms, a "parking lot item" refers to a topic, idea, or question that **arises during a meeting or discussion** but is not directly relevant to the current agenda, so it **is temporarily "parked" to be addressed later, allowing the primary discussion to stay focused**; essentially, it's a way to capture important information that needs to be discussed but not right now

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Questions

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GW Slate Implementation Homepage

https://studentsuccess.gwu.edu/constituent-relationship-management-crm