THE GEORGE WASHINGTON UNIVERSITY

WASHINGTON, DC

Slate CRM Implementation Phase II

Office for Student Success January 31, 2025

Implementation Timeline



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

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 RELForms & 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



Executive Summary

<u>Completed Tasks</u> for the Overall Project:

Our collective efforts have resulted in 129 completed tasks.

Incomplete Tasks for the overall Project:

While celebrating our successes, it's crucial to acknowledge the 119 tasks that still require our attention.



Executive Summary

Incomplete tasks by section



- Backlog of Tasks: 41 tasks (38%)
- GW Parking Lot-High Priority: 23 ta...
- Done: 18 tasks (17%)
- GW Parking Lot Second Priority: 1...
- In Progress: 9 tasks (8%)
- GWSB Pending tasks: 4 tasks (4%)
- To Do: 2 tasks (2%)

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Executive Summary

Total tasks by completion status



Completed: 125 tasks (52%)

Incomplete: 115 tasks (48%)



Elliott

Incomplete tasks by section



Not Needed: 44 tasks (36%)
Backlog of Tasks: 34 tasks (28%)
Done: 18 tasks (15%)
In Progress: 11 tasks (9%)
Sign-Offs: 11 tasks (9%)
Resources: 4 tasks (3%)

Elliott

Total tasks by completion status



Completed: 44 tasks (27%)

Incomplete: 122 tasks (73%)

Medical & Health Sciences





- In Progress: 6 tasks (5%)
- Resources: 3 tasks (2%)

Medical & Health Sciences

Total tasks by completion status



Completed: 51 tasks (29%)

Incomplete: 122 tasks (71%)

Columbian College





Columbian College

Total tasks by completion status



Completed: 56 tasks (31%)

Incomplete: 122 tasks (69%)

School of Nursing

Incomplete tasks by section



Not Needed: 44 tasks (37%)
Backlog of Tasks: 34 tasks (28%)
Done: 19 tasks (16%)
Sign-Offs: 11 tasks (9%)
In Progress: 6 tasks (9%)
Resources: 3 tasks (3%)
To Do: 3 tasks (3%)

School of Nursing

Total tasks by completion status



Completed: 47 tasks (28%)

Incomplete: 120 tasks (72%)

Public Health





Public Health

Total tasks by completion status



Completed: 48 tasks (29%)

Incomplete: 116 tasks (71%)

SEAS



- Not Needed: 44 tasks (38%)
- Backlog of Tasks: 34 tasks (29%)
- Done: 13 tasks (11%)
- In Progress: 11 tasks (9%)
- Sign-Offs: 10 tasks (9%)
- Resources: 3 tasks (3%)
- To Do: 2 tasks (2%)

SEAS

Total tasks by completion status



Completed: 46 tasks (28%)

Incomplete: 117 tasks (72%)

GSEHD





GSEHD

Total tasks by completion status



Completed: 50 tasks (30%)

Incomplete: 115 tasks (70%)

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Questions

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GW Slate Implementation Homepage

https://studentsuccess.gwu.edu/constituentrelationship-management-crm

THANK YOU!

