Slate CRM Implementation Phase II

Office for Student Success
Dec. 13, 2024

Implementation Timeline

Slate Draft Timeline

2023	2024	2025

Undergraduate Implementation — UG and Portal Go Live

Parent Portal — UG Parent Portal Go Live

UG Financial Aid Portal Implementation — UG Fin Aid Portal Go Live

Student Success Implementation

Kick off UG & Grad

Build Graduate Instance — Grad and Portal go live for GWSB

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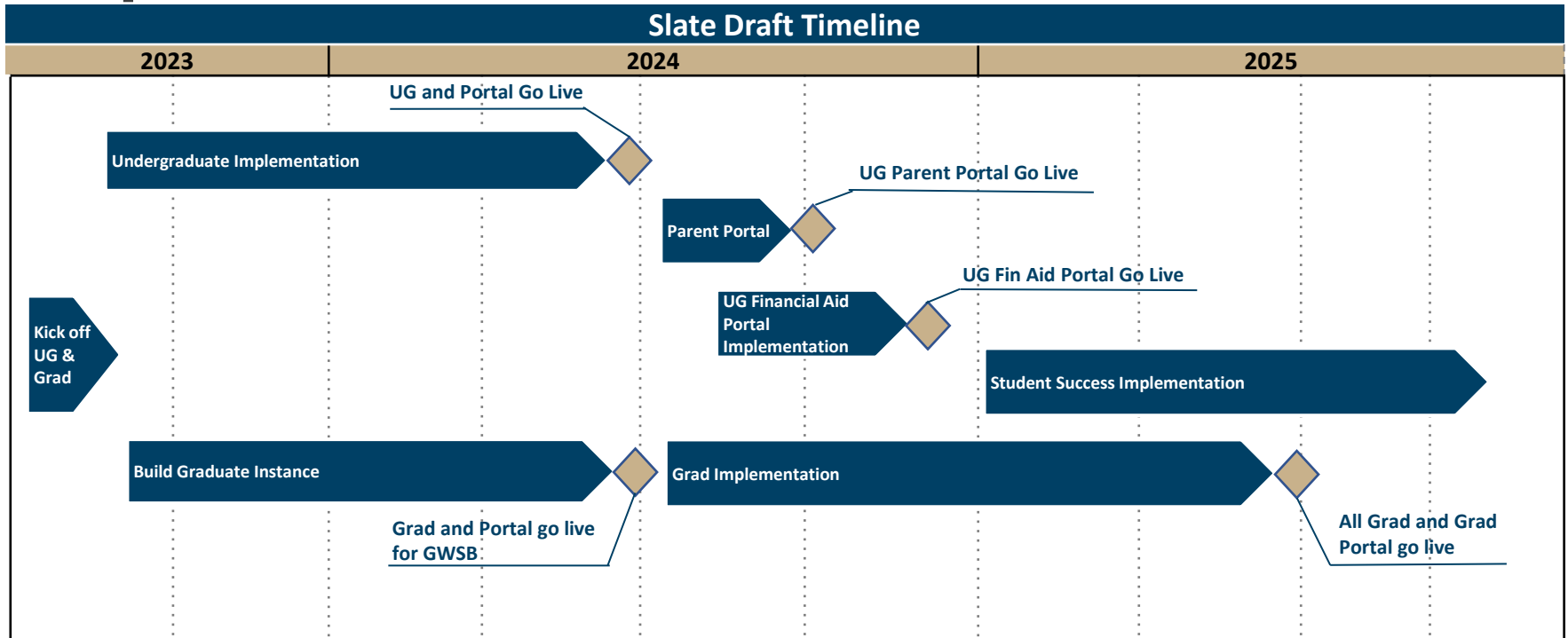
Phase II Implementation (2024- 2025)

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

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

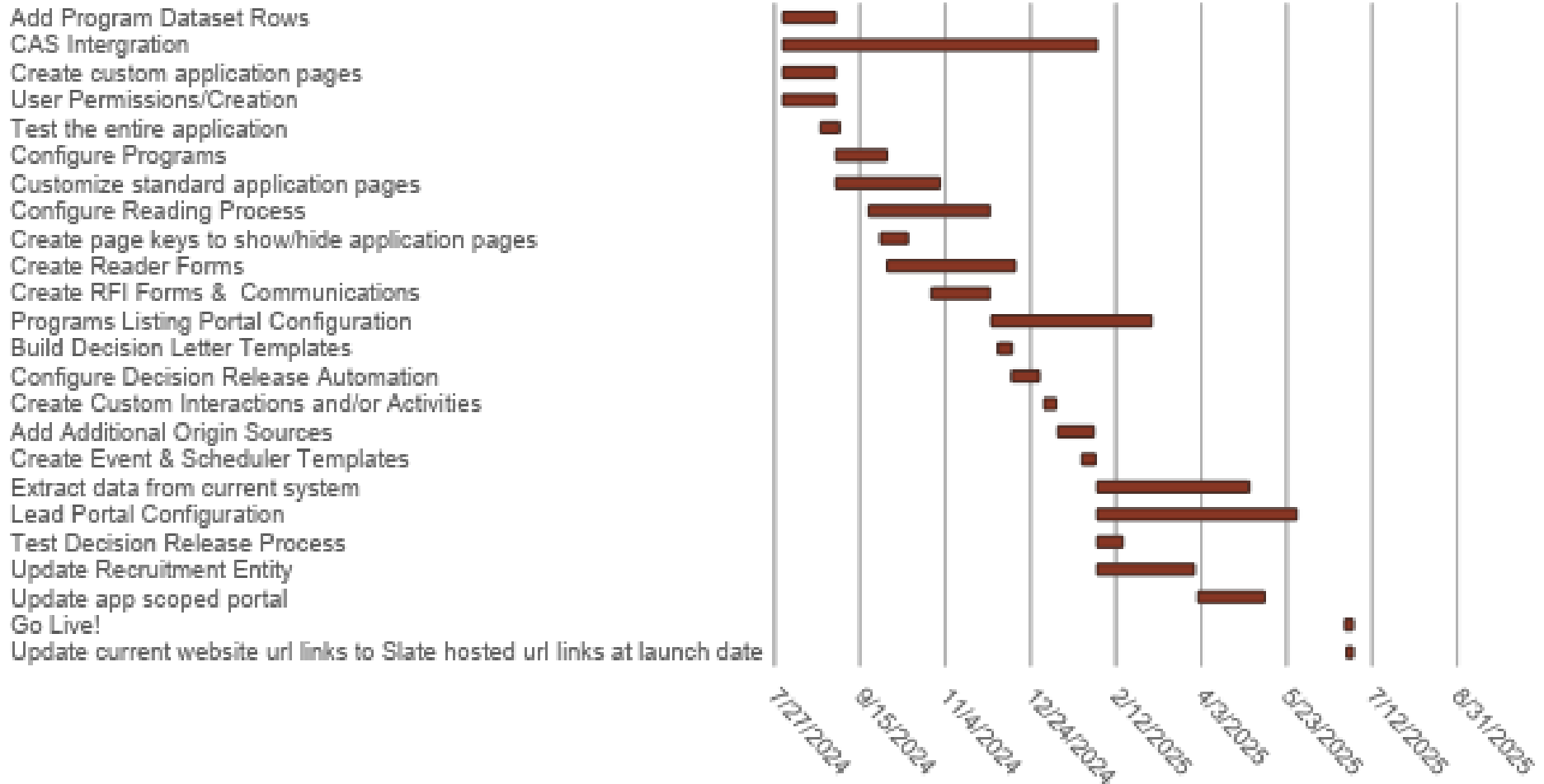August 1, 2024: UG Financial Aid Portal **Kickoff**

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

George Washington University Slate Implementation

Task	
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	

Timeline: 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 123 completed tasks.

Incomplete Tasks for the overall Project:

While celebrating our successes, it's crucial to acknowledge the 111 tasks that still require our attention.

Executive Summary

Overdue Items include:

- ISO - Review and Handoff process
- Combined (4+1) Degree programs-Review process
- Integration: Slate->ServiceNow for CCAS
- CAS applications-Bringing in the official ACT or SAT scores into Slate
- Leads Dashboard
- SEAS-Test Scores, I-20 timing, Post Admit Checklist

# December Dashboards By College (Week of December 9, 2024)

Public Health

Total tasks by completion status

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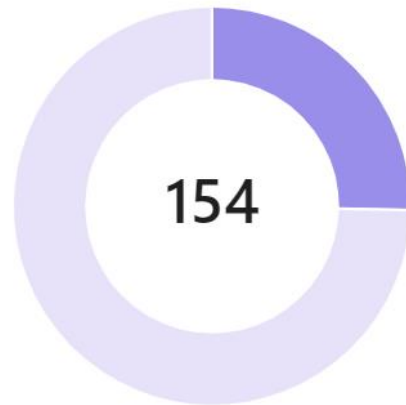
Completed: 39 tasks (25%)
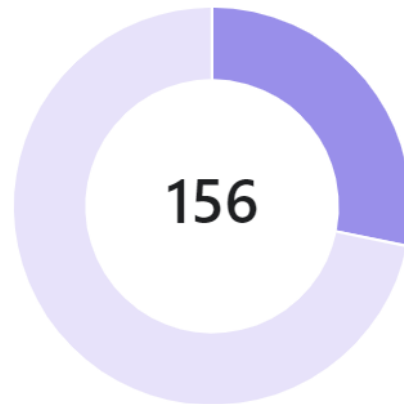
Incomplete: 115 tasks (75%)

Public Health

Incomplete tasks by section

115
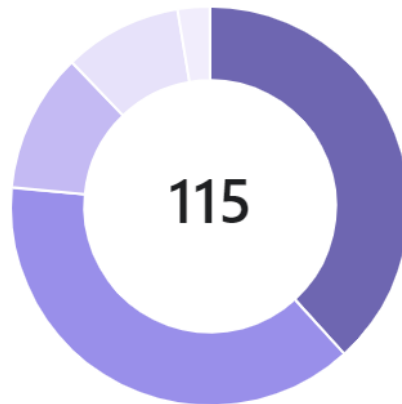
- Backlog of Tasks: 44 tasks (38%)
- Not Needed: 44 tasks (38%)
- In Progress: 13 tasks (11%)
- Done: 11 tasks (10%)
- Resources: 3 tasks (3%)

School of Nursing

Total tasks by completion status

156
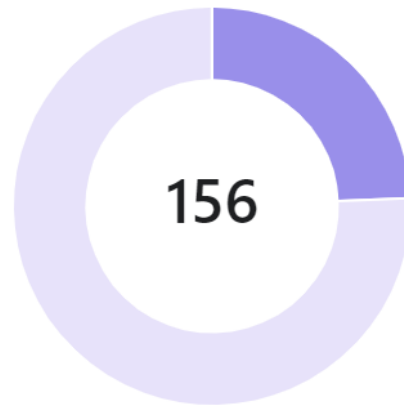
■ Completed: 38 tasks (24%)

■ Incomplete: 118 tasks (76%)

School of Nursing

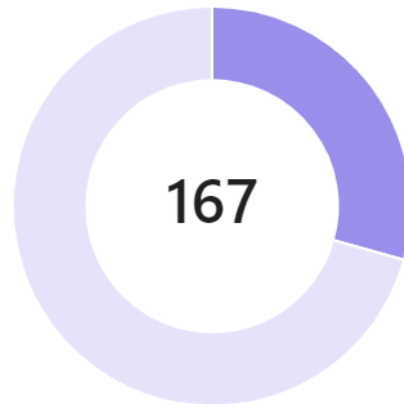

Incomplete tasks by section

118
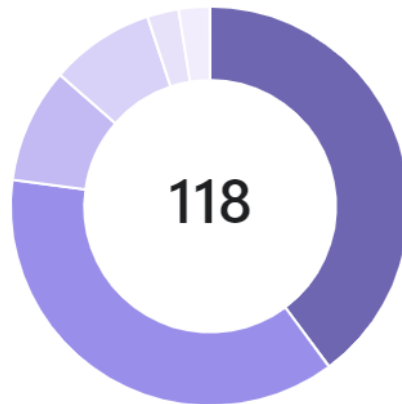
Backlog of Tasks: 47 tasks (40%)

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
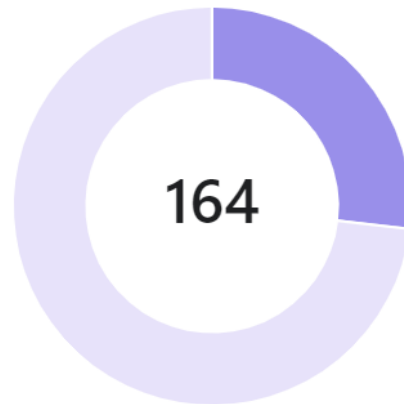
Completed: 44 tasks (27%)

Incomplete: 120 tasks (73%)

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Med & Health Sciences

Incomplete tasks by section

120
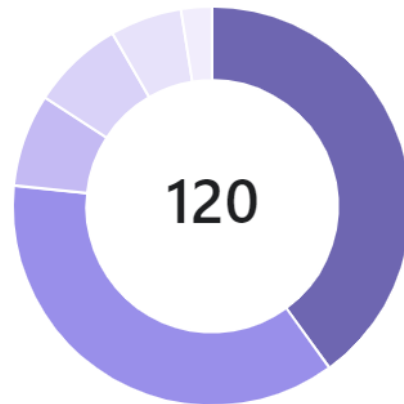
- Backlog of Tasks: 48 tasks (40%)
- Not Needed: 44 tasks (37%)
- In Progress: 9 tasks (8%)
- Done: 9 tasks (8%)
- To Do: 7 tasks (6%)
- Resources: 3 tasks (3%)

Elliot School

Total tasks by completion status

156

Completed: 44 tasks (28%)

Incomplete: 112 tasks (72%)

Elliot School

Incomplete tasks by section
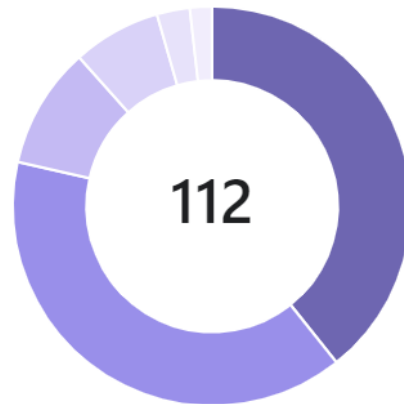
112

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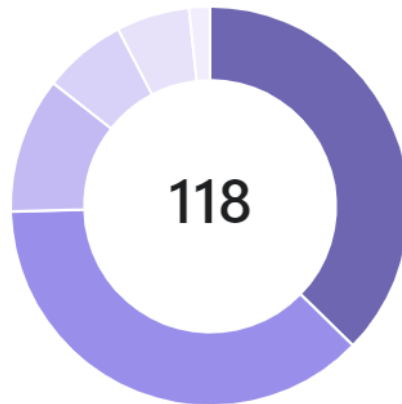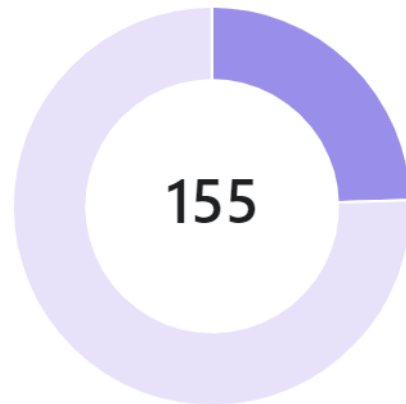- To Do: 2 tasks (2%)

Columbian College

Total tasks by completion status

167

■ Completed: 49 tasks (29%)

■ Incomplete: 118 tasks (71%)

Columbian College

Incomplete tasks by section

118

- 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%)

CPS
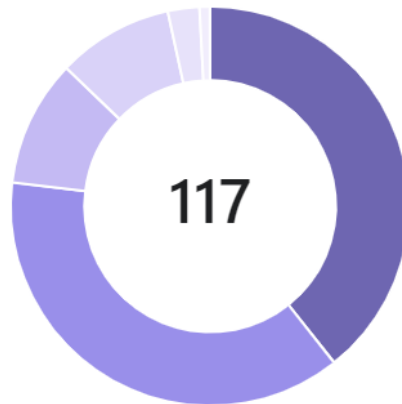

Total tasks by completion status

155

Completed: 38 tasks (25%)

Incomplete: 117 tasks (75%)
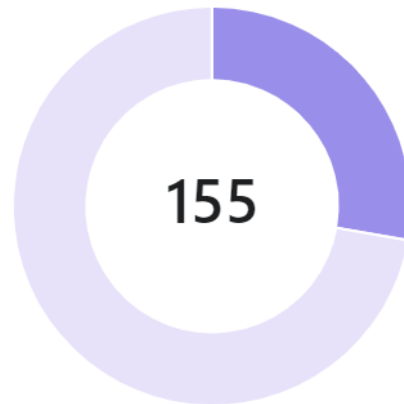
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CPS

Incomplete tasks by section

117

- Backlog of Tasks: 46 tasks (39%)
- Not Needed: 44 tasks (38%)
- Done: 12 tasks (10%)
- In Progress: 11 tasks (9%)
- Resources: 3 tasks (3%)
- Sign-Offs: 1 task (1%)

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GSEHD

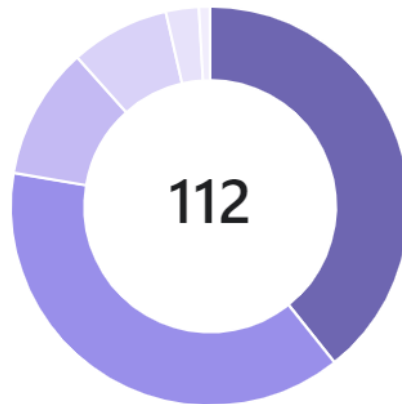**Total tasks by completion status**

155

■ Completed: 43 tasks (28%)

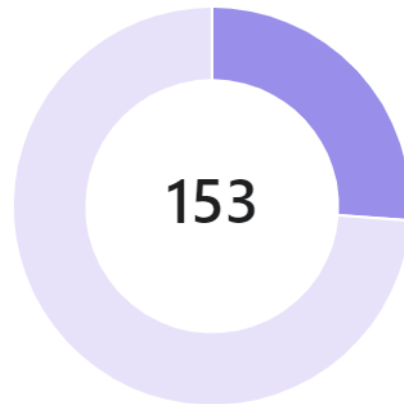□ Incomplete: 112 tasks (72%)

GSEHD

Incomplete tasks by section

112

- Not Needed: 44 tasks (39%)
- Backlog of Tasks: 43 tasks (38%)
- Done: 12 tasks (11%)
- In Progress: 9 tasks (8%)
- Resources: 3 tasks (3%)
- Sign-Offs: 1 task (1%)
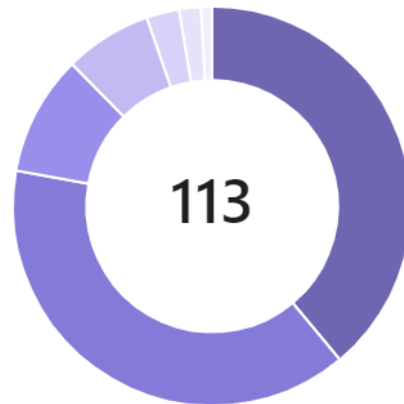
SEAS

Total tasks by completion status

153

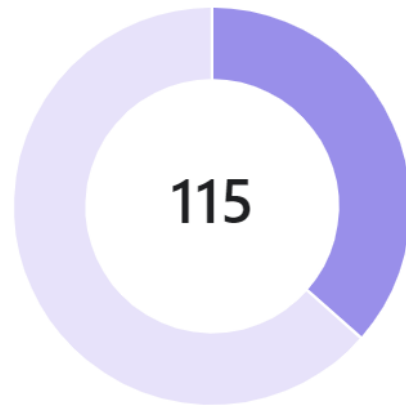■ Completed: 40 tasks (26%)

■ Incomplete: 113 tasks (74%)

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%)

Pre- College & Non- Degree
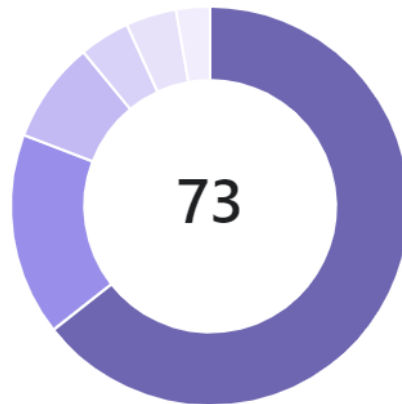
Total tasks by completion status

115

■ Completed: 42 tasks (37%)

■ Incomplete: 73 tasks (63%)

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%)

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News & Updates

Staffing:

The Senior Slate Administrator (Captain) candidates will participate in open forums next week. The goal is to make an offer before we leave for break.

Meetings:.

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

On the Horizon

Parking Lot Items, Integrations, and Testing Log:

- Kashmira will take the lead on these tasks, including scheduling meetings and coordinating with both the HCRC and Inner Core teams.

- Dr. Williams will escalate any challenges she encounters to the Executive/Sponsor team for support or situational awareness.

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Questions

**Contact: Dr. Kimberley Williams
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GW Slate Implementation Homepage

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

THANK YOU!