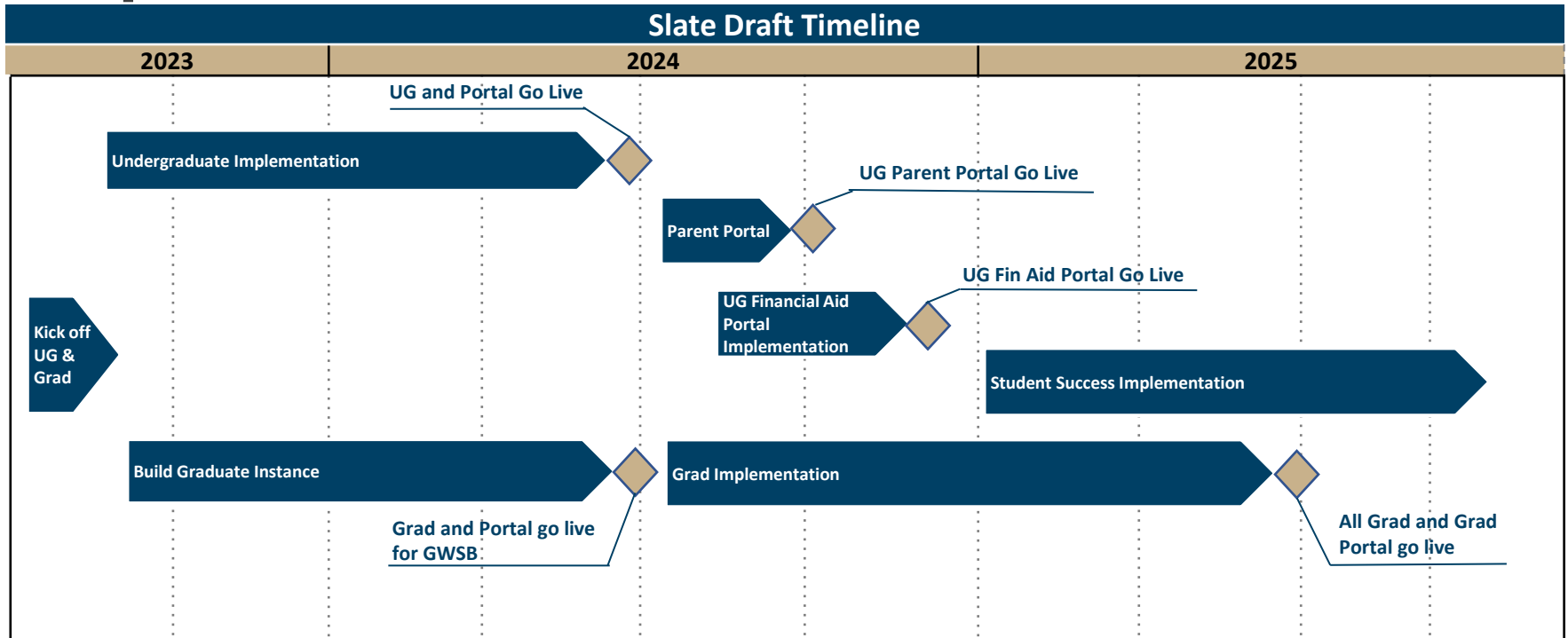

THE GEORGE
WASHINGTON
UNIVERSITY

WASHINGTON, DC

Slate CRM Implementation Phase II

Office for Student Success
February 21, 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**

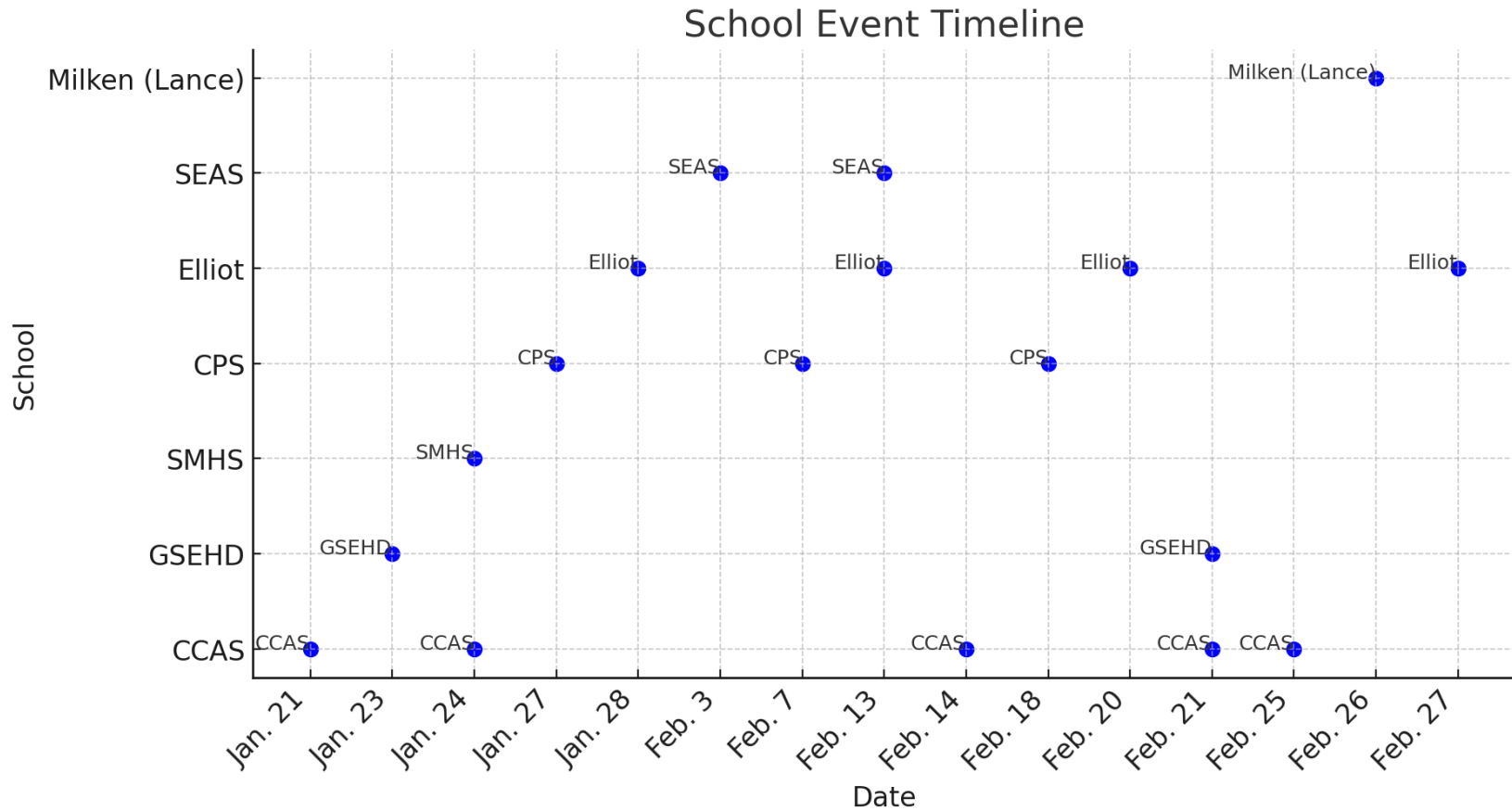
End of Fall: UG Prospective Parent Portal **Go-Live**

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

***April 11, 2025: Graduate Instance **Developed**

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

One-on-One College Meetings to Date



New Senior Slate Administrator!!!

- **Katie Nadorlik joined GW as the Senior Slate Administrator in February 2025.** In this role, she will support event management, inquiry and applicant communication, application cycles, and CRM portal maintenance.
- Katie will oversee CRM data management for Undergraduate Admissions and assist Graduate Enrollment Management, including user permissions, data integrity, error resolution, daily imports, automation updates, portal monitoring, documentation, and third-party data feeds.
- Reporting to the Associate Vice Provost for Student Success, she will serve as the functional lead in integrating the CRM with GW's SIS and external systems. Additionally, Katie will provide training, documentation, and oversight to enhance recruitment and admission processes.

Executive Summary

Completed Tasks for the Overall Project:

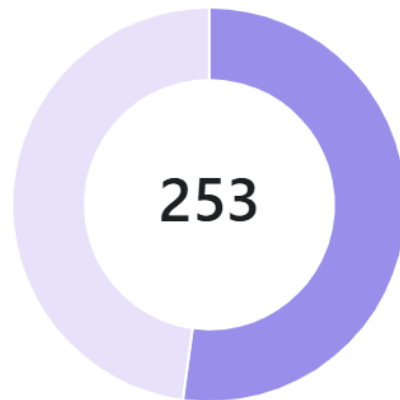
Our collective efforts have resulted in 136 completed tasks.

Incomplete Tasks for the overall Project:

While celebrating our successes, it's crucial to acknowledge the 121 tasks that still require our attention.

Executive Summary

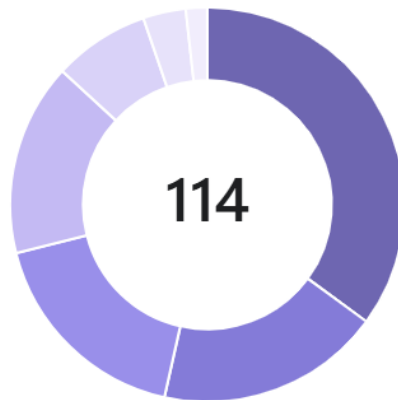
Total tasks by completion status



- Completed: 132 tasks (52%)
- Incomplete: 121 tasks (48%)

Executive Summary

Incomplete tasks by section

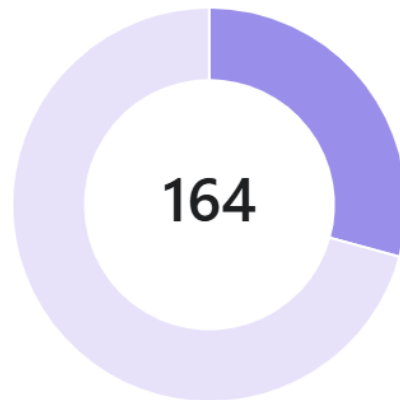


- Backlog of Tasks: 40 tasks (35%)
- GW Parking Lot - Second Priority: 2...
- GW Parking Lot-High Priority: 20 ta...
- Done: 18 tasks (16%)
- In Progress: 9 tasks (8%)
- GWSB Pending tasks: 4 tasks (4%)
- To Do: 2 tasks (2%)

February Dashboards By College (As of Feb. 28, 2025)

Public Health

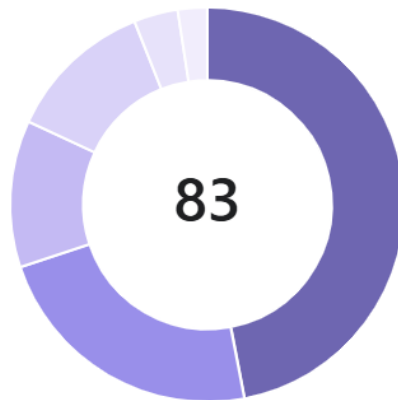
Total tasks by completion status



- Completed: 48 tasks (29%)
- Incomplete: 116 tasks (71%)

Public Health

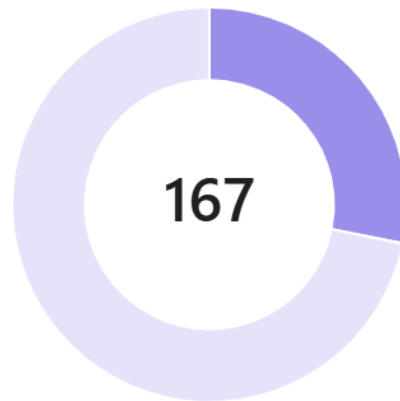
Incomplete tasks by section



- Done: 39 tasks (47%)
- In Progress: 19 tasks (23%)
- Backlog of Tasks: 10 tasks (12%)
- Sign-Offs: 10 tasks (12%)
- Resources: 3 tasks (4%)
- To Do: 2 tasks (2%)

School of Nursing

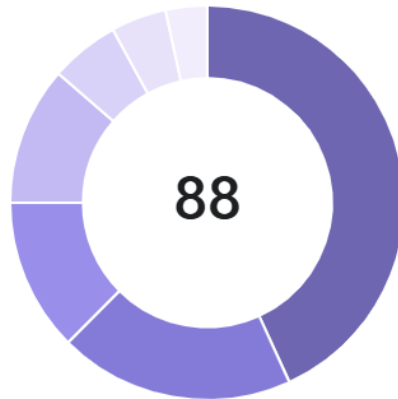
Total tasks by completion status



- Completed: 47 tasks (28%)
- Incomplete: 120 tasks (72%)

School of Nursing

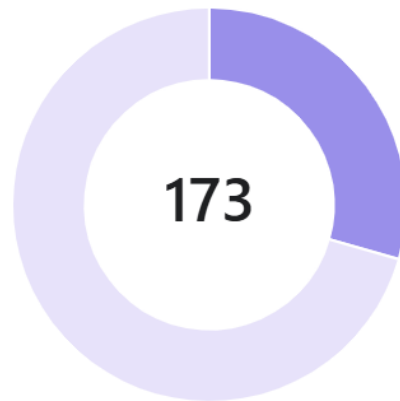
Incomplete tasks by section



- Done: 38 tasks (43%)
- In Progress: 17 tasks (19%)
- Sign-Offs: 11 tasks (13%)
- Backlog of Tasks: 10 tasks (11%)
- To Do: 5 tasks (6%)
- Not Needed: 4 tasks (5%)
- Resources: 3 tasks (3%)

Med & Health Sciences

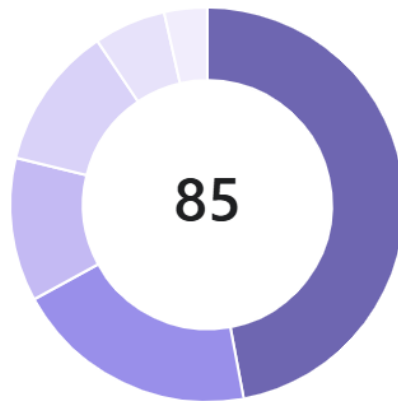
Total tasks by completion status



- Completed: 51 tasks (29%)
- Incomplete: 122 tasks (71%)

Med & Health Sciences

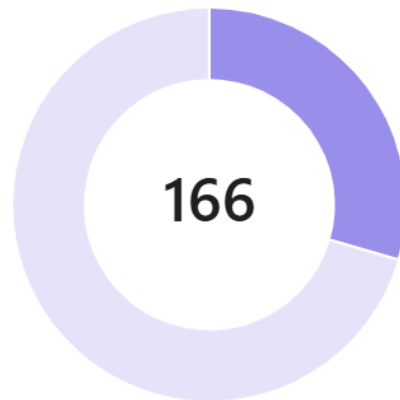
Incomplete tasks by section



- Done: 40 tasks (47%)
- In Progress: 17 tasks (20%)
- Backlog of Tasks: 10 tasks (12%)
- Sign-Offs: 10 tasks (12%)
- To Do: 5 tasks (6%)
- Resources: 3 tasks (4%)

Elliott School

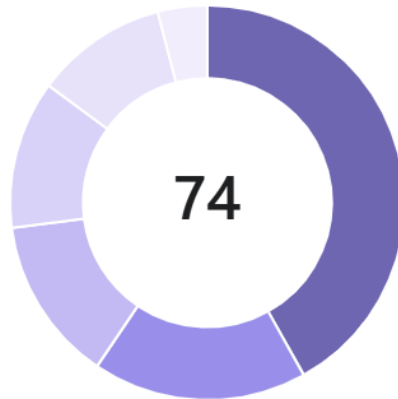
Total tasks by completion status



- Completed: 49 tasks (30%)
- Incomplete: 117 tasks (70%)

Elliott School

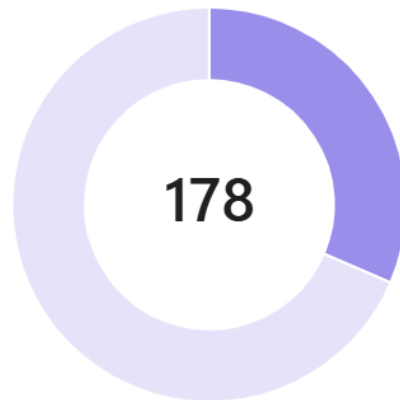
Incomplete tasks by section



- Done: 31 tasks (42%)
- Backlog of Tasks: 13 tasks (18%)
- Sign-Offs: 10 tasks (14%)
- In Progress: 9 tasks (12%)
- To Do: 8 tasks (11%)
- Resources: 3 tasks (4%)

Columbian College

Total tasks by completion status

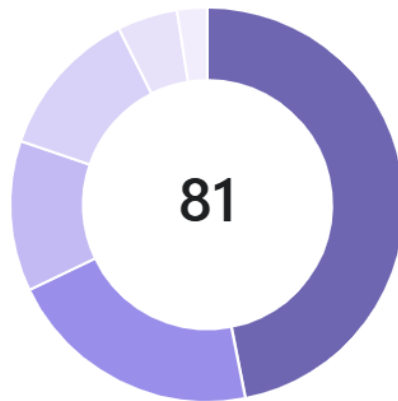


■ Completed: 56 tasks (31%)

■ Incomplete: 122 tasks (69%)

Columbian College

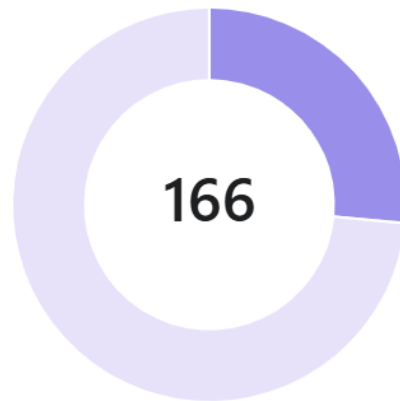
Incomplete tasks by section



- Done: 38 tasks (47%)
- In Progress: 17 tasks (21%)
- Backlog of Tasks: 10 tasks (12%)
- Sign-Offs: 10 tasks (12%)
- To Do: 4 tasks (5%)
- Resources: 2 tasks (2%)

CPS

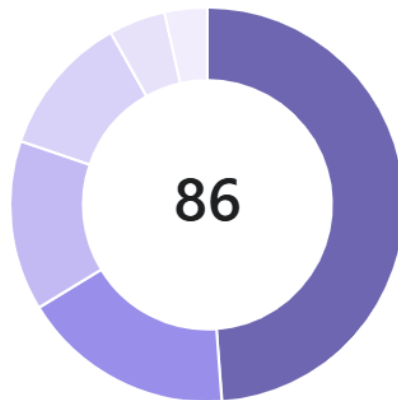
Total tasks by completion status



- Completed: 44 tasks (27%)
- Incomplete: 122 tasks (73%)

CPS

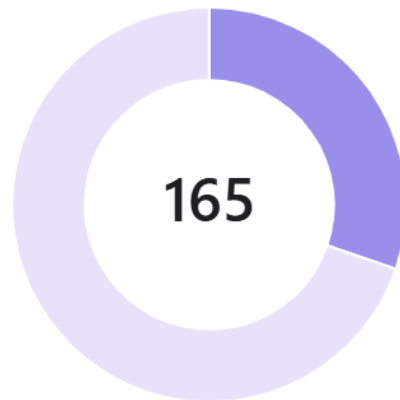
Incomplete tasks by section



- Done: 42 tasks (49%)
- In Progress: 15 tasks (17%)
- Backlog of Tasks: 12 tasks (14%)
- Sign-Offs: 10 tasks (12%)
- Resources: 4 tasks (5%)
- To Do: 3 tasks (3%)

GSEHD

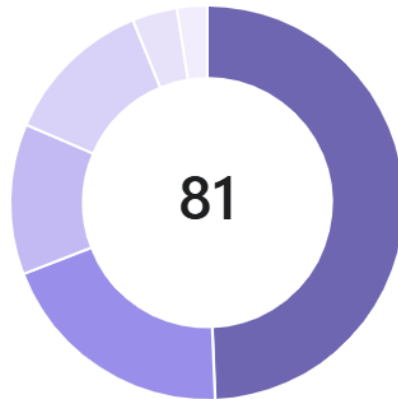
Total tasks by completion status



- Completed: 50 tasks (30%)
- Incomplete: 115 tasks (70%)

GSEHD

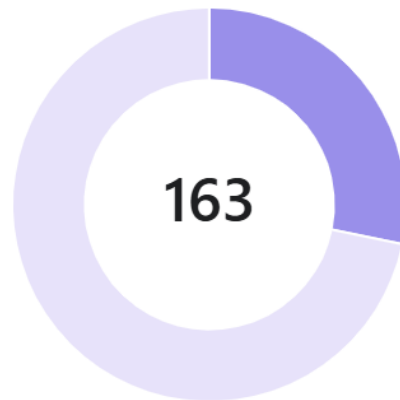
Incomplete tasks by section



- Done: 40 tasks (49%)
- In Progress: 16 tasks (20%)
- Backlog of Tasks: 10 tasks (12%)
- Sign-Offs: 10 tasks (12%)
- Resources: 3 tasks (4%)
- To Do: 2 tasks (2%)

SEAS

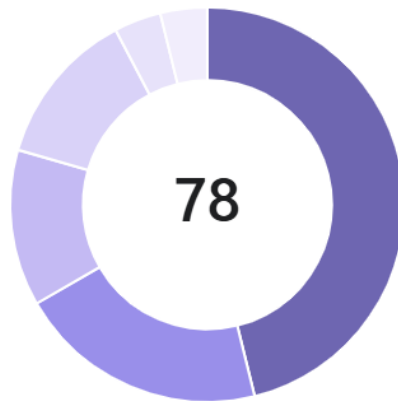
Total tasks by completion status



- Completed: 46 tasks (28%)
- Incomplete: 117 tasks (72%)

SEAS

Incomplete tasks by section



- Done: 36 tasks (46%)
- In Progress: 16 tasks (21%)
- Backlog of Tasks: 10 tasks (13%)
- Sign-Offs: 10 tasks (13%)
- Resources: 3 tasks (4%)
- To Do: 3 tasks (4%)

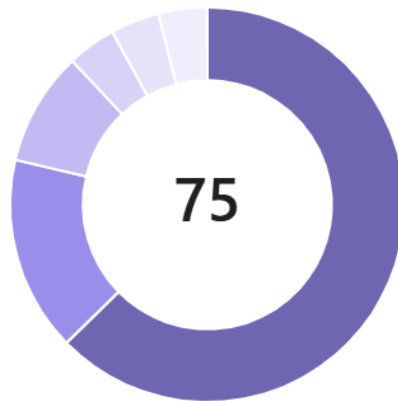
Pre- College & Non- Degree

Incomplete tasks by section



Pre- College & Non- Degree

Incomplete tasks by section



- Backlog of Tasks: 47 tasks (63%)
- Done: 12 tasks (16%)
- In Progress: 7 tasks (9%)
- Resources: 3 tasks (4%)
- To Do: 3 tasks (4%)
- Sign-Offs: 3 tasks (4%)

Questions

Contact: Dr. Kimberley Williams
AVP for Student Success
kimberley.williams@gwu.edu

GW Slate Implementation Homepage

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

THANK YOU!