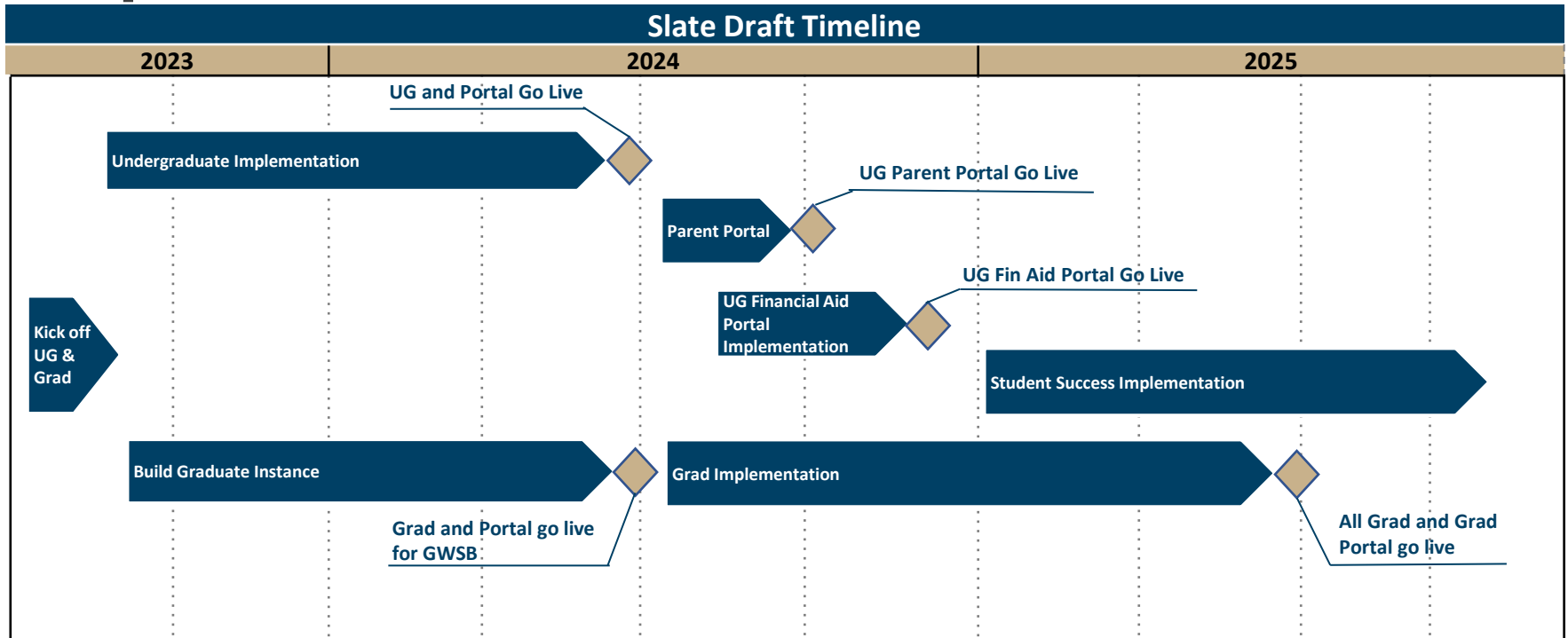


Slate CRM Implementation Phase II

Office for Student Success
May 30, 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**

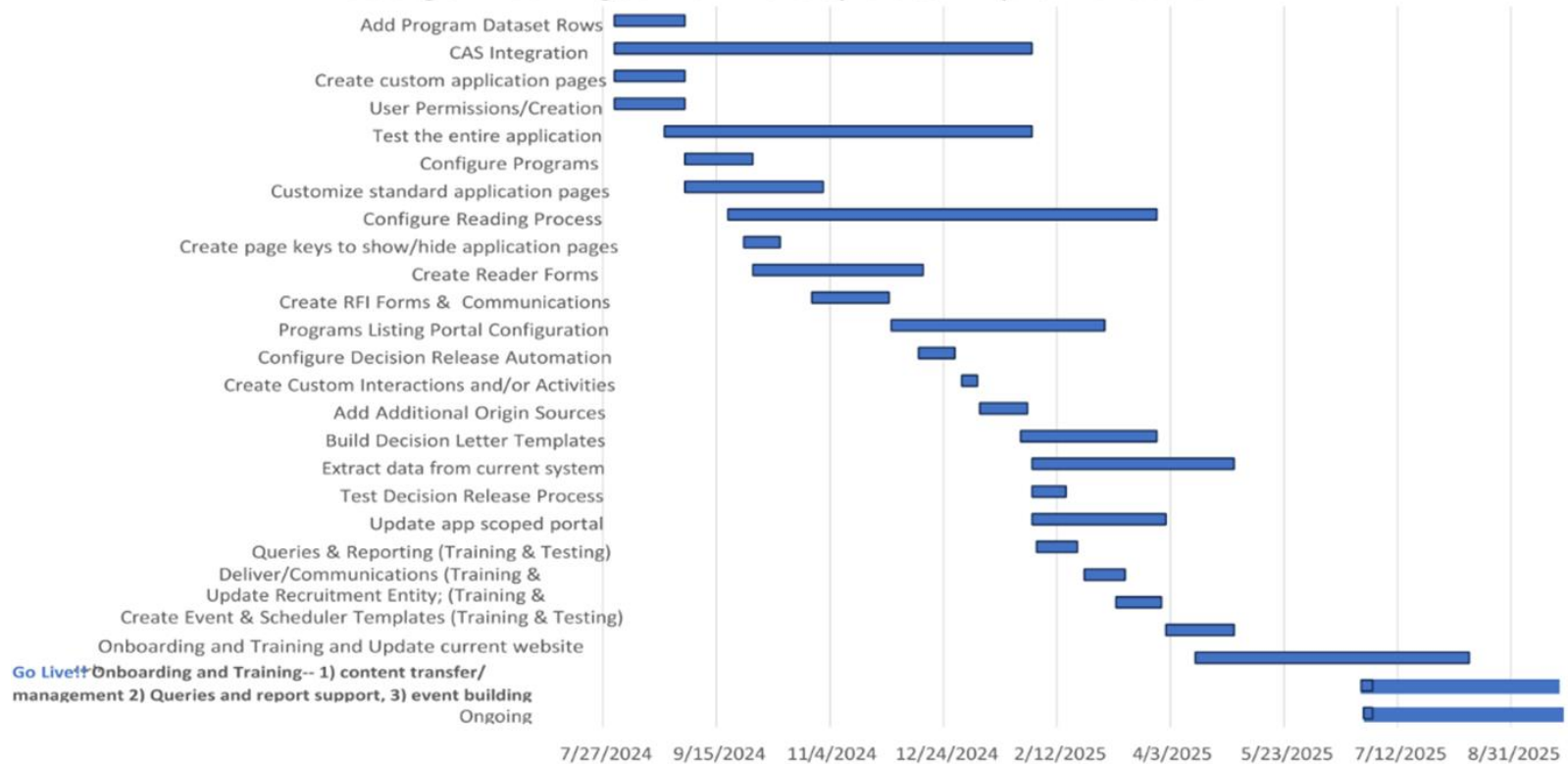
Spring/Summer- Onboarding and Training-- 1) Content transfer/management 2) Queries and report support, 3) Event building support

April- June 2025: **Various Go-Live Dates**

Post-go live: **Ongoing Support**

Slate Implementation Timeline

George Washington University Slate Implementation



Phase II Implementation Go Live Dates

Application Go-live Date	School	Program(s) Launch
4/24/2025	SMHS	CASPA
6/2/2025	SEAS	Combined programs
6/20/2025	SMHS	Physical Therapy
7/1/2025	SMHS	Translational Health Sciences, PHD
7/1/2025	GSEHD	16 programs (See detailed tab for list)
7/2/2025	CCAS	CSDCAS program
7/7/2025	SEAS	All programs
7/7/2025	CCAS	All programs - RFI & Events
August 1 (tentative)	Elliot	All graduate programs
7/25/2025	SMHS	Occupational Therapy; Summer 2026 Online Programs
7/28/2025	CCAS	All programs-opening the application
8/1/2025	SON	All programs
8/1/2025	GSEHD	30 programs (See detailed tab for list)
8/12/2025	SMHS	Post-baccalaureate Pre-Medicine
August (tentative)	Elliot	Data Analytics for Policy Professionals (non-degree)
8/15/2025	GWSB	All programs
8/15/2025	Milken	All programs
9/1/2025	SMHS	Leadership in Clinical Practice and Education, DHSc
9/1/2025	CPS	All Programs
9/15/2025	GWSB	Internal Certificate Application
December (tentative)	Elliot	US Foreign Policy (non-degree)
December (tentative)	Elliot	National Security Studies Program (non-degree)

Go-Live Readiness: What to Expect Next

- As we approach the next phase of the CRM rollout, we want to provide a quick overview of the upcoming support schedule related to go-live preparation:
- **Teams with June/July Go-Live Dates**
 - They will begin hearing from the Slate Admin team shortly to schedule go-live prep meetings. These sessions are critical to ensure everything is in place for a smooth transition.
- **Teams with Late July/Early August Go-Live Dates**
 - We will begin outreach to your teams in **June** to schedule go-live prep meetings in advance of your launch window.

These meetings will help **confirm readiness, review key workflows, and address any outstanding technical or training needs**. Please encourage your team members to respond promptly to scheduling requests so we can stay aligned with your go-live timelines.

College Go-Live Checklist

- **Program Dataset Updates**

- Re-review your programs and make any necessary updates
- Reach out to Slate Admins ASAP about any new programs that need to be activated
- Reach out to Slate Admins ASAP about any existing program that need to be inactivated
- Important: All terms data is updated on Program Dataset Terms tab

- **Deliver**

- Emails built and scheduled for all Prospect related items
- Emails built and scheduled for all Applicant related items
- Note: All transaction/System emails will be activated by the Slate Admins team. You can read more about this in our GW Slate GEM Instance System Emails documentation.

- **Events**

- Any necessary Prospect related Events are built in Slate
- Template
- Communications
- Events themselves
- Any necessary Applicant related Events are built in Slate
- Template
- Communications
- Events themselves
- Website links updated with new Slate Event links

- **RFI Forms**

- RFI Forms tested by college/school staff members
- RFI Form communications updated with college/school-specific branding
- Website links updated to new Slate RFI links
- Use program specific embed codes if needed.
- Make sure an UTM tracking that is needed is set up.
- Add the new Program Preferences link to any follow up emails so prospects can self-service adjust their preferences.

- **Application**

- Website links updated to new Slate-hosted application link

- **Reader**

- Staff Assignments - Update as needed
- Double check your reviews. Reminder: Only 1 committee chair per program
- Remove yourself anywhere you may have put yourself as a reviewer for testing
- Bin Digest Email Opt in/Out settings

- **Data Migrations: Policy Document Coming Soon**

- Prospect list has been pulled from Salesforce and imported to Slate (Slate Admins will be involved)
- In-progress Applicants have been pulled from Salesforce and imported to Slate (Slate Admins will be involved)

College Go-Live Checklist

- Queries/Reports: Note: This should be your “must have” and essential queries and reports for monitoring purposes.
 - Any queries necessary for initial go-live/day-to-day monitoring have been created
 - Any reports necessary for initial go-live/day-to-day monitoring have been created
- Miscellaneous
 - All necessary college/school staff members have been added to Slate as users
 - All necessary faculty members have been added to Slate as users
 - Note: If you have a long list of staff and/or faculty to add to Slate, please reach out to the Slate Admins for assistance.
 - Deposit Banner Codes are all added to this list
 - College/school specific documentation has been created
 - If not done so already, send Slate Admins your fee waiver codes for input and also which Events attendance should allow a fee waiver.
- Post Go-Live
 - Decision Letter finalization



**INDIVIDUALIZED
SUPPORT OPTION**



**COLLEGE STAFF –
GENERAL SLATE
TRAINING SESSIONS**



**FACULTY –
GENERAL SLATE
TRAINING**



**COLLEGE STAFF –
SLATE OPERATIONS
OVERVIEW**



**FACULTY –
SPECIALIZED
TRAINING**



**COLLEGE STAFF
SPECIALIZED
TRAINING**

Slate Training Opportunities – Summer 2025

◆ Individualized Support Option

- **1:1 Help Sessions (July–August)**
- **Facilitator:** Katie
- **Format:** 30-minute individual virtual sessions
- **Availability:** 8 time slots per week (except the week of August 4)
- **Scheduling:** Sign-ups will open in late June
- **Note:** Days and times will vary weekly

◆ College Staff – General Slate Training Sessions

- **Hosted by the Slate Admins Team**
 - **Primary Presenter:** Katie
 - **Co-Presenter:** Diana (based on availability)
 - **Format:** Virtual, 2 one-hour sessions
 - **Frequency:** 4 sets of offerings
- **Topics Covered:**
 - System overview and navigation
 - Understanding a Slate record
 - Applicant journey walkthrough
 - Introduction to the Reader experience
- **Training Dates & Times:**
 - **Week of June 2:** Monday & Wednesday at 9:00 a.m.
 - **Week of June 9:** Tuesday & Thursday at 3:00 p.m.
 - **Week of June 16:**
 - Monday & Wednesday at 10:00 a.m.
 - Tuesday & Wednesday at 3:00 p.m.

Slate Training Opportunities – Summer 2025

◆ College Staff – Slate Operations Overview

- **Primary Presenter:** Colby
- **Co-Presenter:** Katie
- **Format:** Virtual | 2 one-hour sessions
- **Frequency:** 3 scheduled offerings
- **Audience:** Staff managing programs, terms, and access
- **Key Topics:**
 - Managing the Program Dataset
 - Granting access to faculty and staff
 - Making changes to terms, review processes, and program requirements
- **Important Note:**
Schools are encouraged to group together for this training when possible. **Elliott and CCAS** should attend the same session due to their shared **Materials Processing Workflow**.

◆ Faculty – General Slate Training

- **Primary Presenter:** Colby
- **Co-Presenter:** Katie
- **Format:** Virtual | 1 one-hour session
- **Dates:** August (exact days/times to be announced)
- This session will provide a high-level overview of the Slate environment as it relates to faculty decision-making and review responsibilities.

Slate Training Opportunities – Summer 2025

◆ College Staff – Specialized Training

- **Primary Presenter:** Your school-based Slate Functional Lead
- **Modality/Frequency:** Customized based on your school's needs
- **Recommended Topics:**
 - Operational workflows in Slate
 - Marketing and Deliver (email) functionality
 - Events management
 - Reading and decision responsibilities
 - Query and reporting basics

◆ Faculty – Specialized Training

- **Primary Presenter:** Your school-based Slate Functional Lead
- **Modality/Frequency:** Customized based on your school's needs

Recommended Topics:

- Faculty-level reading and decisioning responsibilities

Background: Train-the-Trainer Model

- Between **February and May**, all school-based Slate Functional Leads received hands-on training through:
 - Weekly **Inner Core Sessions** (events, Deliver, recruitment tools, queries, reporting)
 - One-on-one sessions with Slate Admins for school-specific workflows
- This **train-the-trainer approach** equips Functional Leads with the knowledge to tailor and deliver Slate training that aligns with your school's processes and priorities.

FAQs

- **How was the training plan developed?**

- The training schedule was created based on feedback from the **GEM Slate Instance Training Survey** and informed by the staffing resources currently available.

- **Will training sessions be recorded?**

- Yes. All training sessions will be recorded and stored in the **Slate Project Phase II folder** for on-demand access.

- **Will there be make-up sessions?**

- Yes. We will schedule make-up sessions as needed. Additional opportunities will be shared throughout the summer.

- **Will training continue after the summer?**

- Yes. Refresher sessions will be offered in the fall for staff who need additional support.

- **How do staff sign up for training?**

- Staff can sign up for June sessions using the link below. Sign-ups for July and August sessions will be shared soon.

- **Will documentation be available?**

- Yes. The Slate Admin team will use **Scribe** to generate visual documentation during training sessions.

- **Is there an asynchronous option?**

- Yes. The team is developing a **microcredential** based on this summer's training sessions. This will be available to staff for independent learning later in the year.

Post–Go-Live Development Pause and Support Priorities

As we enter this critical phase of the project, it's important to set clear expectations for what happens after go-live:

- **No new development is planned for at least 6–12 months** (per Katie) to allow schools the time and space to fully acclimate to the new system.
- **All edits, configuration tweaks, and bug fixes will be reviewed and prioritized** based solely on their impact on system functionality.

Rationale for Development Pause and Support Strategy

1. Ensure System Stability and Reliability

- A pause in development helps identify and resolve any unforeseen issues that may not have surfaced during testing.

2. Support User Adoption and Confidence

A development freeze allows users time to:

- Adjust to the new interface and workflows
- Gain comfort and confidence through consistent use
- Avoid confusion caused by frequent changes or new features

3. Focus on Risk Management and Quality Assurance

By pausing new development, we can:

- **Concentrate resources on addressing high-impact issues**
- Prevent the introduction of instability from new, untested features
- Maintain a consistent, reliable user experience across all schools

Questions

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GW Slate Implementation Homepage

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

THANK YOU!