

A vertical column of ten small, light blue dots on the left side of the page.A cluster of yellow and white geometric shapes in the top right corner, including a solid yellow triangle, a white outline triangle, and a yellow rectangle.

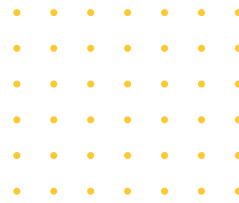
SLATE IMPLEMENTATION

AT-A-GLANCE

JAN 2024

go.gwu.edu/SlateCRM

At-a-glance Report as of January 2024



An Overview

As we approach the halfway mark of the first phase of our SLATE CRM project, it's time to take stock of our progress, milestones achieved, and the road ahead. The overall success of Phase I, set to end in June, has been a testament to the collective dedication and expertise of both GW staff and our partners at HCRC (Human Capital Research Corporation).

Information shared in this report serves as both a reflection on our accomplishments and a compass that will guide our actions and decisions in the upcoming months. Since the Slate Implementation committee's inaugural meeting in October 2023, over one hundred tasks of the 238 outlined in Phase 1 of this project have been completed. This At-a-Glance report highlights the following:

01

**Phase One:
Completed Tasks**

02

Future Updates

At-a-glance Report

Project Tracking



113

Completed Tasks in Phase One

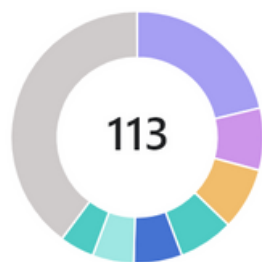
Phase I

The project management tool being used to track the progress of this implementation is Asana. Asana provides two main visuals for team members to track and respond to project milestones.

Although donut charts resemble pie charts, they are much easier to interpret due to their ability to help viewers focus on the changes in values instead of stressing the relative sizes of the sectors (Jaspersoft).

Below is a chart that illustrates the 113 completed Phase I tasks (as of 1/8/24).

Total tasks by Category



- Application Development: 24 selections (21%)
- Slate-Hosted Application: 9 selections (8%)
- Decisions: 9 selections (8%)
- Communications: 8 selections (7%)
- Rules/Automation: 7 selections (6%)
- Data Architecture: 6 selections (5%)
- Forms: 5 selections (4%)
- Other: 45 selections (40%) + 15 more

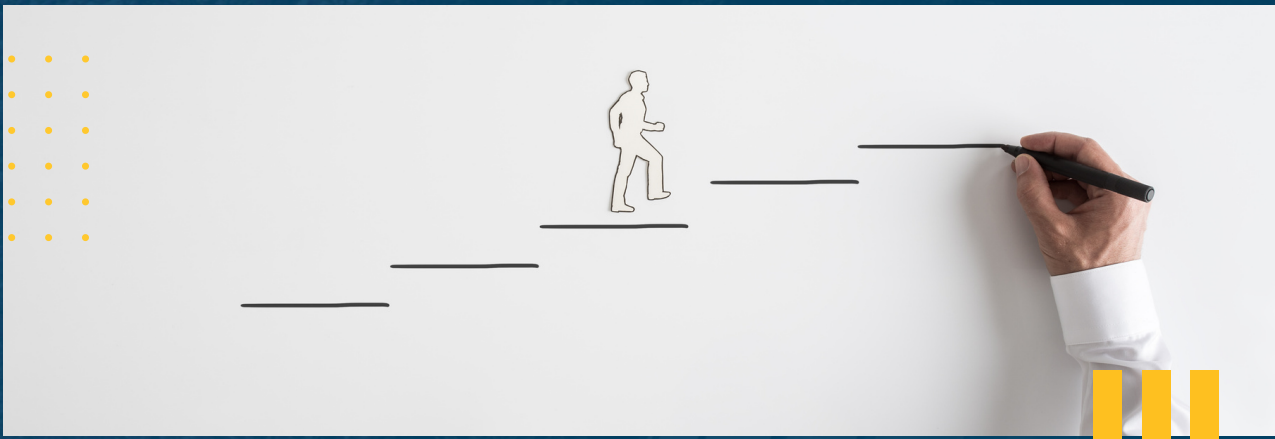
Phase One: Completed Tasks

As of January 8, 2024:

- Build Source Format
- Add Lead Scoring on Export/Import
- Recent Source Collected - UTM Collection
- First Source Collected - UTM Collection
- Last Activity Date
- Lead Rating
- Lead Disposition
- Recruiter Last Contact Date
- Lead Stage
- Status (Active or Inactive)
- Winning Source
- Staff Assigned
- Grad Certificate Selection
- UG References
- UGA Majors by Category
- Grad Financial Aid/Funding
- Grad Employment
- UG Disciplinary (incorporated into application information)
- Grad Term Selection
- Grad Admissions Information
- Grad Academic History
- Grad Personal Background
- UG Academic History
- UG Personal Background
- First & Recent Source Tracking (UTMS)
- Recruitment Entity Fields

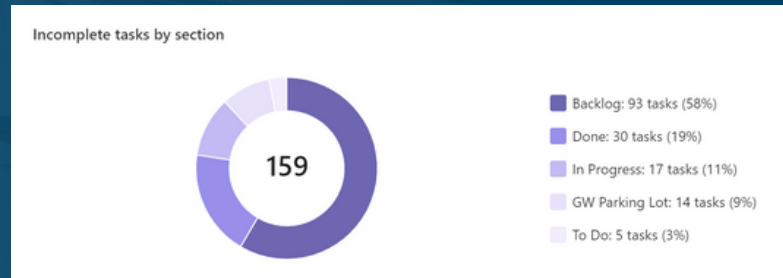
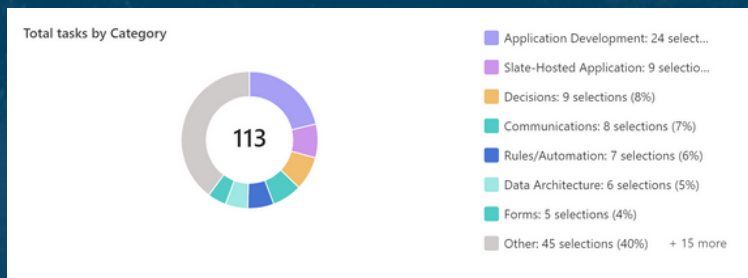


January 2024



Future Updates

Beginning in February 2024, project updates (i.e., Total tasks by completion status and the Incomplete tasks by section) will be available on the CRM project website.



In summary, in this report we have highlighted the significant strides made since the project's launch and provided an outline of the roadmap that will guide us towards the finish line. Our journey thus far has been characterized by the pursuit of excellence, innovation, and adaptability in the face of an ever-increasing competitive higher education marketplace.

Committee member's unwavering commitment to collaboration, innovation, and relentless pursuit of distinctiveness has been the driving force behind the milestones we've achieved thus far.

Connect:



Website
go.gwu.edu/SlateCRM



Email Address
kimberley.williams@gwu.edu