



Implementation of Slate: a New CRM Platform

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What can a CRM do for USI?

- A Customer Relationship Management (CRM) solution allows a university to optimize multiple operations across campus
- A lifecycle CRM allows a university to track and communicate with individuals through all stages of the relationship (prospects -> applicants -> admits -> enrolled students -> alumni)
 - Personalized and customized 1:1 communication (email, SMS, etc)
 - Event Management
- Allows for the automation of many manual processes
- Allows for the sharing of data across units through customized visual dashboards
- A lifecycle CRM will position us to be more competitive in an increasingly competitive market

What can a CRM do for USI? cont'd

- If we fully adopt the right solution, the effect can elevate USI's recruitment and retention efforts:
 - Will require commitment and patience of many units
 - Potentially disruptive in the short term, with long-term benefits
 - Potentially expensive up front (grant funded), cost-saving in the long-term
 - Will increase timeliness of our initiatives and expand our capacity for real-time decision making



CRM Solutions



Ellucian
Recruit



Fireworks by
Fire Engine Red



Salesforce



Slate

What CRMs are our peers & competitors using?

Recruit	Fireworks	Salesforce	Slate
Tennessee State	No regional peers or competitors	Indiana University	Ball State University
	Used primarily at community colleges and professional colleges	Purdue University (moving from Slate)	Indiana State University
Other Products		Ivy Tech	University of Evansville
Murray State University		Indiana University/Purdue University Indianapolis	Vincennes University
Starfish			Western Kentucky University
Southern Illinois Univ. Edwardsville			University of Indianapolis
Target X/Radius			University of Tennessee, Martin
Southeast Missouri			Tennessee Tech University
Element 451			Belmont University
			University of Arkansas, Little Rock (moving from Recruit)

Advantages of Each CRM

Recruit	Salesforce	Fireworks	Slate
Easiest to integrate with Banner	User experience is easy to navigate	Great customer service/support	Complete Lifecycle CRM
Product is currently used at USI	Integration with Banner	Designed for higher education use	Integration with Banner and TouchNet
Real-time data		Used Currently by UG Admissions	User friendly data analysis & visualization
TouchNet Integration			Digital media analytics

- **All four products have dashboard capabilities**
- **All four products offer 1:1 SMS capabilities**

Disadvantages of Each CRM

Recruit	Salesforce	Fireworks	Slate
Customer Support/service	Not truly a full lifecycle CRM	No API for Banner integration	Customer Service/Support
Has not improved enough in recent years	Separate applications needed for full lifecycle capacity	Not a full lifecycle CRM; limited to recruitment and admissions	
Not a full lifecycle CRM; additional products needed	No TouchNet integration	No TouchNet integration	

Next Steps: Slate-Student Success

Technolutions Service Desk slate

Search...

Bednell, Kendrick

Enrolled 797771784

Watch Flags: Academic Integrity Violation

- Dashboard
- Timeline
- Fourth Year
- Third Year
- Second Year
- First Year
- Research
- Profile
- Materials
- Class Schedule
- Academic
- Advising Notes

Advisor Snapshot

Level of Study Undergraduate	Class Standing Senior	Program Type Bachelor of Arts (B.A.)	Declared Major Biology
Residence Hall North Towers	Advisor Sarine Telfer	Cumulative GPA 2.00	...A ...45
Overall Risk Score 3.5	Completed Credits 114	Credits Needed 10	Tags Absenteeism, Homesick, Academic Probation

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Tags

- Absenteeism
- Academic Probation
- Athlete
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- Hold - Financial
- Homesick
- Legacy
- Opt Out
- Re-Recruit
- Test Record

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Biographic
Male
Born 03/11/2000, age 21

Fourth Year



Status History
09/15/2020 Prospect
10/05/2020 Enrolled

