# Implementation of Slate: a New CRM Platform

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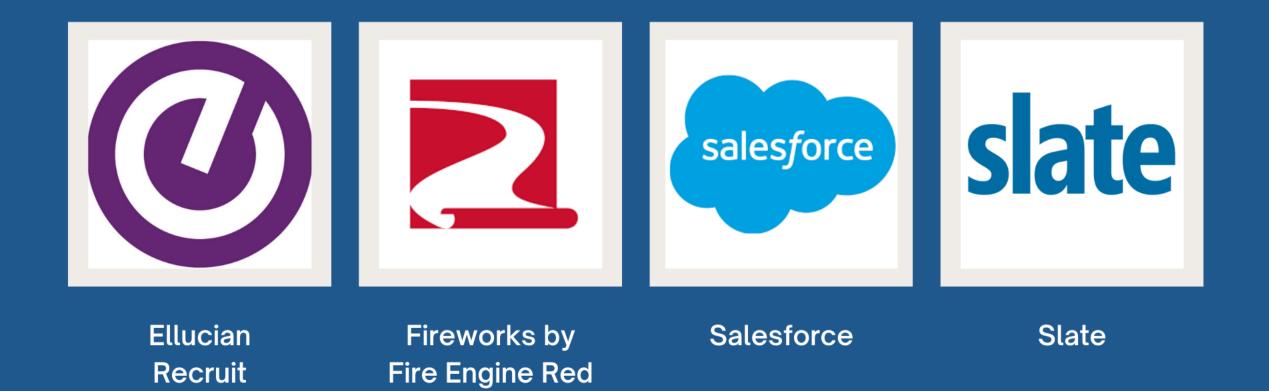**Slate Implementation Team**

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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** |
| | | **Ivy Tech** | **University of Evansville** |
| | | **Indiana University/Purdue University Indianapolis** | **Vincennes University** |

| Other Products |
|---|
| Murray State University |
| Starfish |
| Southern Illinois Univ. Edwardsville |
| Target X/Radius |
| Southeast Missouri |
| Element 451 |

Slate (continued):
- **Western Kentucky University**
- **University of Indianapolis**
- **University of Tennessee, Martin**
- **Tennessee Tech University**
- **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 | Intigration with Banner and TouchNet |
| Real-time data | | Used Currently by UG Admissions | User friendly data analysis & visulaization |
| 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