SLATE CRM IMPLEMENTATION

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"OUR PARTNERSHIP WITH SIG SAVED US FROM EVERY POTENTIAL PITFALL ON OUR IMPLEMENTATION PATH, AND LED US TO SUCCESS." -MITCH ALEMAN, CRM MANAGER

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INSTITUTIONAL PROFILE

Founded in 1891, the University of La Verne is composed of the College of Arts & Sciences, College of Business & Public Management, the LaFetra College of Education, College of Law, and a Regional Campus Administration that oversees seven regional campuses. It awards both undergraduate and graduate degrees, and many of their classes are taught at smaller campuses throughout the greater Los Angeles area. Serving more than 8,000 traditional age and adult learners, the university is a pioneer in adult education, offering specialized programs at the main and regional campuses.

PROJECT BACKGROUND

Initially, this service was to revitalize the their incumbent CRM as part of the Enrollment Improvement Initiative (EII) of which SIG served as a permanent member for the duration of the project. This was a cross functional group of strategic decision makers and day-to-day managers empowered with making change to improve enrollment and the student experience. Once it was clear their current system could not be salvaged SIG provided services to help find a new CRM looking at both Salesforce® and Slate. Eventually Slate was selected, and SIG provided the implementation services of the project conducting process-based BPA's and serving as the technical liaison and CRM administrator until one was hired. SIG held a Slate Captain's license for the duration of the project.

PROJECT DESCRIPTION

Services provided by SIG included:

- Project management
- Process analysis
- Data import builds for all test scores (SAT, ACT, GRE, TOEFL, GMAT)
- Legacy files from CRM Recruit and Banner
- Integrations with programs like Duolingo and Front Rush

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PROJECT DESCRIPTION CONT...

SIG also worked on Zapier integrations via Carnegie Dartlet and other inquiry files as needed. Inquiry forms, event forms and voyager were built out by SIG, and the management and oversight of a third-party consultant who built out the application and reading system was included. SIG was also responsible for helping with the drip marketing campaigns and decision letters.

SIG also served as the technical liaison between SSD Axiom and the college for the interface build. SIG was primarily responsible for the common app and EAB (Royall) Application import as well as files out to EAB. SIG also handled the interface to BDMS Xtender.

BENEFIT/VALUE

- The implementation helped La Verne expose themselves to more prospects than ever before by giving them control of groups like common app suspects, prospects and front rush
- It put a responsive marketing system into their hands to reach parents, students and counselors in ways that were not possible before
- It aligned procedures so that applications were processed faster and more accurately than before
- It removed over a dozen access databases that manipulated data in unnecessary ways before sending it off to various parties on campus
- It increased automation and put power in the hands of the admissions team to respond and connect with students
- It ended a system of moving paper files from department to department

HOW SIG CAN HELP

SIG offers signature implementation and consultation services that help leverage the full capabilities of the Slate system, with processes that meet institution's specific objectives. And, if Slate has already been adopted SIG can help maximize your instance through advanced implementation services and personalized consultations with our in-house experts.

As a Slate Preferred Partner, SIG can provide the following services:

- Expedited implementation to align with institution goals and needed functionality for just-in-time deployment
- Advanced implementation to assess and build custom campaigns, events, applications and configure workflows in ways that will allow you to make the most of Slate
- Training sessions to amplify your Slate instance
- A diagnostic review and assessment of business practices and how they align to the parts of Slate that will maximize ROI and staff effectiveness
- Slate support including CRM training and on-going assistance