

Getting Started Guide

Table of Contents:

- [Guiding Principles](#)
- [Assembling a Slate Team](#)
- [Time Commitment](#)
- [The Slate Roadmap](#)
- [Implementation Strategies](#)
- [Support Structure](#)
- [Submitting Requests](#)
- [Steps for Success](#)
- [Preparation Checklist](#)
- [Project Planning](#)

Guiding Principles

Consider these four guiding principles when starting with Slate, and revisit these principles annually.

★ **Best Practice:** Moving an admissions business processes to Slate is an opportunity to reconsider all of the steps needed in order to accomplish objectives. Many current business processes may have developed based upon the limitations of previous technology tools. For example, an existing 10-step process could become 2 steps in Slate. Use this time at the beginning of implementation to consider efficiencies that can be achieved.

1. Start simple and build over time.

In the first year of implementation, focus on building and understanding the architecture of Slate, taking advantage of the many delivered tools. Don't get bogged down with very special edge cases. Design for the 99%, and the rest falls into place.

2. Use all available resources.

Slate provides documentation, webinars, and integrated help resources to accompany every tool within Slate. It is highly recommended that the implementation roadmap is followed in order to build a strong foundational understanding before moving to the next tool.

3. Commit to creating a sustainable process.

Slate's 'out-of-the-box' functionality immediately offers new and improved ways of doing business. Building processes using best practices will make future updates much easier, with minimal time investment.

4. Be creative.

Instead of simply recreating an old system within Slate, think carefully about how to structure current processes in an ideal world. Slate can support and foster many different, efficient business processes, so be creative – the possibilities are endless!

Assembling a Slate Team

Technolutions requests 2 to 3 admissions office team members to serve as Slate Captains. In addition to the Slate Captains, implementation will require both time and attention from other staff members in a variety of areas.

Slate Captains

Slate Captains will attend Slate Launchpad, oversee the project priorities, and actively take responsibility for creating sustainable business processes within Slate. In addition, Slate Captains will provide staff training for other users in the office.

Slate Captains should be experienced admissions officers or counselors who have a solid understanding of current processes including the application, reading, and decisioning methods and goals. Slate Captains should be organized individuals who can clearly articulate current business processes. They should be creative and willing to re-imagine new business needs. Additionally, they should be able to commit adequate time to focus and go through the necessary build-out and training along the way. Perhaps most importantly, they should be empowered to make decisions throughout the implementation of Slate without consistently relying upon outside support.

There are other essential staff which will be involved in a Slate implementation, including admissions leadership and IT staff, but it is the Slate Captains that are the most suitable fit for the purposes of this initial functional training.

Some possible candidates include the Director of Operations, Associate or Senior Director, or an Admissions Coordinator.



Is Slate implementation an IT project? Slate is not a conventional IT project. It is important to acknowledge that Slate is built for the admissions world and will be used primarily by admissions staff.

95% of the tasks related to implementation will be focused around business processes and can be completed directly by the Slate Captains. IT will play an important role with regards to integration with external systems.

Other Stakeholders

It is important to carefully plan and delegate projects throughout implementation. Much like an admissions office, Slate is an integrated system, and as such, different team members may be called upon to support particular phases during the transition to Slate.

Roles in Slate

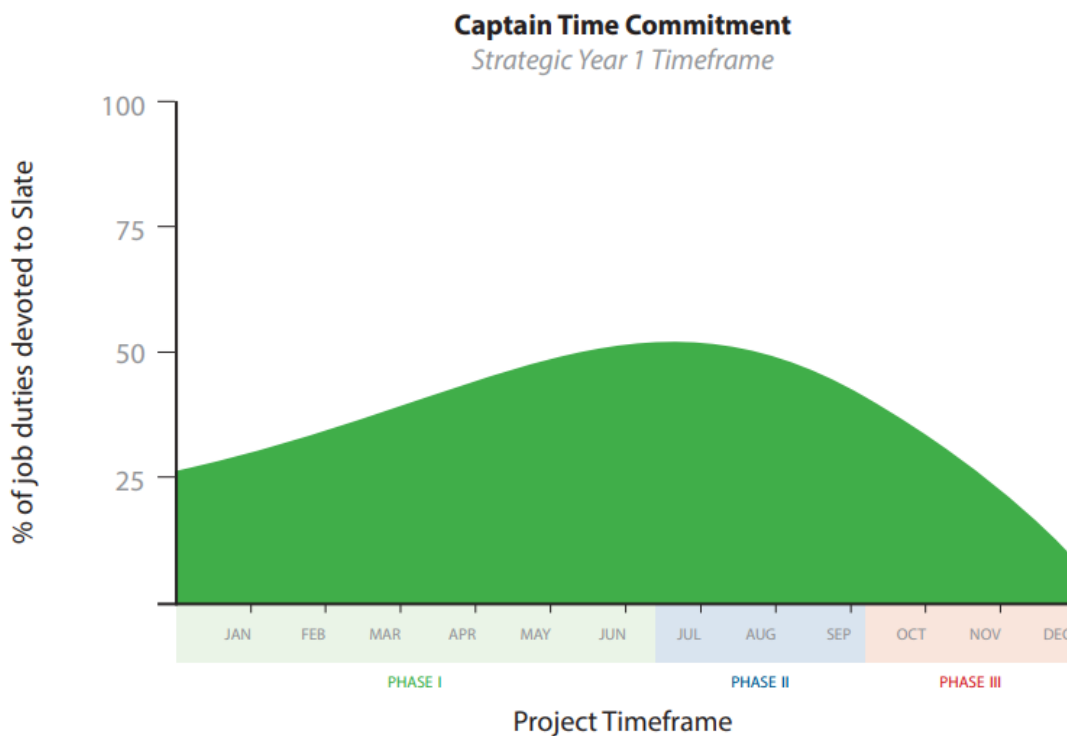
Integration Team
Leadership Team
Outreach Team
Superusers
As needed

Candidate

IT Staff
Dean, Director of Admissions
Director of Marketing
Admissions Counselors / Operations
Consultants (optional)

Time Commitment

How much time Slate Captains will need to devote to Slate depends on the project timeframe and resources that the team can allocate throughout the implementation. In general, the more aggressive the timeframe, the more time Slate Captains will need to devote to Slate.

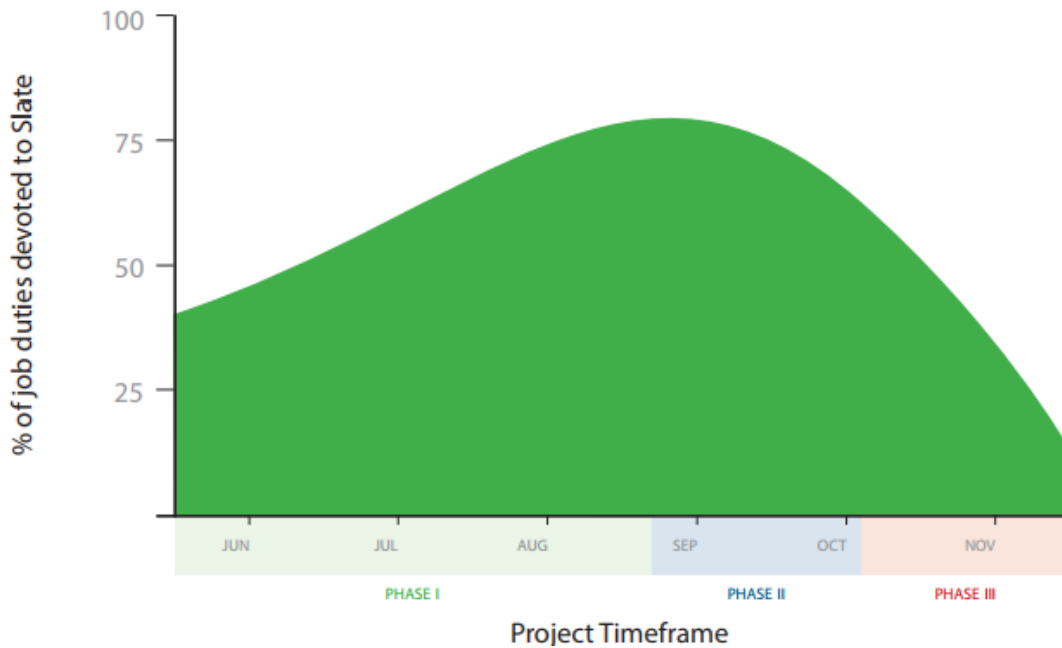


Best Practice: Make an office commitment to build a strong knowledge of all fundamental functionality in your first year. Focusing on Slate tools allows Slate Captains to move through the implementation as quickly and nimbly as possible.

Many partner schools start an implementation thinking that their multi-step process must be replicated precisely in Slate. However, as Slate Captains come to learn more about the Slate tools, they will learn that those historical processes may be translated into Slate in a much more efficient way.

Captain Time Commitment

Aggressive Year 1 Timeframe



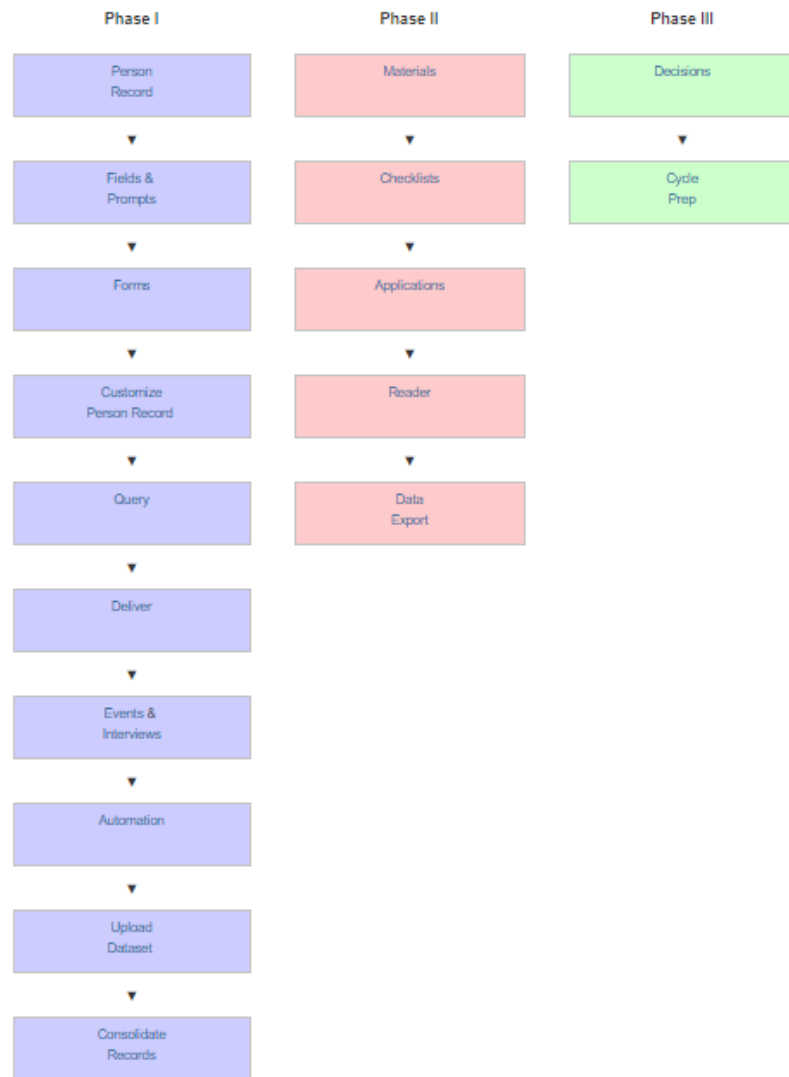
The Slate Roadmap

The Slate Roadmap is used to organize and chart progress during the first admissions cycle. Slate Launchpad will follow this Roadmap to encourage building the Slate instance in a particular order. Proceeding in this order will ensure a smoother and more successful implementation.

Following the Roadmap will ensure that Slate Captains acquire critical Slate skills in a straightforward, strategic, and manageable order. For example, the lessons Captains will learn during the early Phase I boxes (e.g., Inquiry Form, Events) are crucial skills to have in order to guarantee success for later Phase I boxes (e.g., Upload Dataset), as well as all items in Phase II and Phase III.

The Roadmap phases are strategically designed to ensure that Slate Captains acquire their Slate skills in a manageable order and the ongoing admissions cycle is acknowledged and strategically transitioned into Slate.

The Roadmap



Implementation Pace

If the project timeframe permits, a good strategy is to have Slate Captains focus their efforts on at least one Roadmap box per week. Some boxes will require more time and some will require less. In general, this is a reasonable pace to expect.

When can data be imported?

Importing data into Slate requires fundamental Slate skills that Captains will acquire during Phase I. Once these skills have been acquired, data can be brought into Slate.

Captains who follow the Roadmap and focus on building sustainable business processes will easily transition into Slate as the system of record.

Implementation Strategies

The Slate implementation process may seem very different from a traditional software system implementation. It can be helpful to understand and embrace a few important elements of the Slate implementation process before attending Slate Launchpad.

★ **Best Practice:** The best way to learn about Slate is to use it. A test environment may be provisioned to try out tools and build and test processes with actual data in a playground. While it may feel daunting to “go live” before every part of the admissions process is build, it is strongly recommended that certain tools be utilized in the production environment when initial work on a particular Roadmap box is completed.

The sooner staff begins to access and use the Slate administrator screens, the sooner their comfort level with Slate will begin to grow!

When to “Go Live”

One of the biggest differences between Slate and other systems is that Slate does not typically have one system-wide “go live” date. Slate is designed to “go live” gradually as tasks on the Slate Roadmap are accomplished. For example, when an inquiry form and on-campus events are set up, these may “go live” before the interviewing process is ready to launch.

A sample Slate “go live” schedule may look like this:

Tool/Process	"Go Live" Date
Inquiry Form*	February 1
On-Campus Events*	March 1
Interviews/Trips*	April 1
Off-Campus Events*	April 15
Upload Dataset - Prospects*	May 1
Prospect Deliver Campaigns*	May 15
Upload Dataset - Applicants	June 1
Application	July 1
Checklists/Student Status	August 1
Reader	September 1
Exports to SIS	October 1
Decisions	November 1
Post Decision Process	December 1

* Alternatively, Slate Captains may opt to prepare all prospecting tools (inquiry form, events, prospecting email campaigns, etc.) and “go live” on the same day.

Please submit a request to the Service Desk and Technolutions can help strategize a smart “go live” schedule.

Test Environments

While Slate does offer a fully-featured test environment, it is a best practice to develop all business processes in the production database. Rest assured that these processes will not be available to the general public until they are ready. Furthermore, it is relatively easy and safe to adjust and manage data and procedures in the production database.

Support Structure

In addition to Slate Launchpad, there are a myriad of Slate resources that should be utilized before submitting a Service Desk request and users should familiarize themselves on how to access these resources.

Slate Support Resources

Slate Cycle	Slate Launchpad	Focused Calls	Service Desk	Forums, Slate TV, Documentation	Webinars	Slate Summit
First cycle using Slate <i>(First-Year Slate Schools)</i>						
At least one cycle in Slate <i>(Veteran Slate Schools)</i>						

Slate Launchpad

Slate Launchpad is where implementation truly begins. Up to three Slate Captains from each school are invited to Portland, Oregon or New Haven, Connecticut for a four-day training course that lays the foundation for implementing Slate. A team of Technolutions experts will guide them through the interconnected tools of Slate and help strategize ways of maximizing Slate's versatility and customizability to meet individual institutional needs.

Focused Calls

Once Slate Launchpad is completed, Focused Calls may be requested with Technolutions. These 30-60 minute phone calls with specialists require clear agendas and detailed project explanations.

Submitting Requests to the Service Desk

The Technolutions Team

Technolutions is organized like the traditional liberal arts education model. Each institution is assigned a program manager who is a generalist in all things Slate. In addition, each program manager specializes in a specific functional area of Slate, where they are developing the product direction, building new features and functionality, providing support for existing features and functionality, and identifying and communicating best practices.



Tip! Access the Service Desk by clicking the “Service Desk” link in the Database page of Slate. Take time to read through the requirements for each type of request. Spending time on clearly articulating a request will result in a more timely response. Please note that all requests are not equal, so some may take a longer response time than others.

When a Service Request is submitted, a category selection is required to ensure that it is routed to the team specializing in that particular topic. Since requests may be answered by any program managers, it is imperative that the request is written with clear instructions:

How to be CLEAR within a request

Categorize

Requests will be routed to specialists, so proper categorization will result in faster response times.

List examples and URLs

Requests should always include examples with full URLs that link to them.



Request Categories

A complete list of request categories, including descriptions, is available in a Slate Scholar article “Service Desk category descriptions” which is accessed from the link in the Database page of Slate.

Expected behavior

Provide exactly what is expected or desired to happen.

Actual behavior

Use specific terms to describe what is currently happening.

Rank

After submitting the request, rank it and click “Submit Priorities.”



Service Desk vs. Email

Service Desk requests are routable, trackable, rankable, and updateable. An email to a Program Manager does not benefit from access to the comprehensive array of Technolutions resources and staff.

The Service Desk exposes questions and requests to the entire company. This provides a direct line to specialists in areas where a particular set of skills is needed.

New Feature Development

The existing and delivered features and functionality of Slate enable the articulation of nearly any business process without the development of new features and functionality. Ideas for new features or functionality may be submitted

to the Feature Requests forum where they are crowd sourced for further ideas and comments. Product enhancements are released consistently throughout the year.

Steps for Success

As Slate Captains begin their journey into Slate, there are four main steps for success:

1. Attend Slate Launchpad.

Slate Launchpad is a 4-day intensive training and implementation workshop for both Slate Captains and new employees of an institution. The course material emphasizes the framework of Slate and the interconnectivity of the features and functionality. Slate Captains and other users will leave Slate Launchpad with a foundation of Slate, knowledge to continue with the initial and ongoing build-out of their database, and the knowledge of where to go to obtain guidance around questions and ideas you may have along the way.

2. Read the Documentation.

Technolutions offers extensive documentation on features and functionality throughout Slate. All documentation is available through Slate Scholar. (Access the Forums through the link on the Database page in Slate.) Documentation updates are provided regularly as tools are enhanced.

3. Watch Slate TV Training Videos and Webinars.

Technolutions offers a number of webinars throughout the year. These webinars, led by program manager specialists, demonstrate Slate tools, features and functionality, as well offer best practices for certain processes like importing data and releasing decisions. All webinars are recorded and links are accessible through the link on the Database page in Slate.

4. Request a Focused Call.

After Slate Launchpad, all partners may request unlimited Focused Calls to discuss strategies on how to achieve certain objectives. Focused Calls are submitted through the Service Desk when a discussion is needed that is beyond Slate's documented resources.

Preparation Checklist

Use the checklist below to help prepare for implementation:

Housekeeping

- ☐ Finalize agreement
- ☐ Watch the "Welcome to Slate" webinar
- ☐ Assign Captains
- ☐ Register for an upcoming Slate Launchpad event

Submit Technical Details Form

- ☐ Provision subdomain
- ☐ Provide Single Sign-On (SSO) details

Make a preliminary project plan

- ☐ Make a list of stakeholders
- ☐ Make note of critical “go live” dates (e.g., reading begins, decision release)
- ☐ Indicate when stakeholders will need to be included in the project

Consider all current systems

- ☐ Make a list of most frequently used current admissions systems
- ☐ Understand how each system is used for current business processes
- ☐ Make a list of external data systems that will push or pull data from Slate

Collect Examples

- ☐ Print inquiry form(s)
- ☐ Print complete application(s)
- ☐ Print reader review form(s)
- ☐ Document decision codes

Start Packing

- ☐ Laptop (don't forget the power cord!)
- ☐ Business casual dress
- ☐ Confirm reservations

Project Planning

Use this worksheet to develop the initial scope and timeline for the first Slate cycle:

Outreach				
SLATE RESOURCE		TYPE	GO LIVE DATE	STAKEHOLDERS
Inquiry Form				
On-Campus Events	Event A			
	Event B			
	Event C			
Off-Campus Events	Event A			
	Event B			
	Event C			
Interviews				
Marketing Campaigns				
Applications				
SLATE RESOURCE		TYPE	GO LIVE DATE	STAKEHOLDERS
Slate Application(s)				
Imported Application(s)				
Reading and Decisions				
SLATE RESOURCE		APPLICATION ROUND	GO LIVE DATE	STAKEHOLDERS
Reader	Training			
	Reading Begins			
Decisions	Processing			
	Release			
Data Integration				
SLATE RESOURCE		EXTERNAL SYSTEM	GO LIVE DATE	STAKEHOLDERS
Data Export				
Data Import	Current Data			
	Historical Data			