

Messaging in Slate

Slate Training Guide 2017

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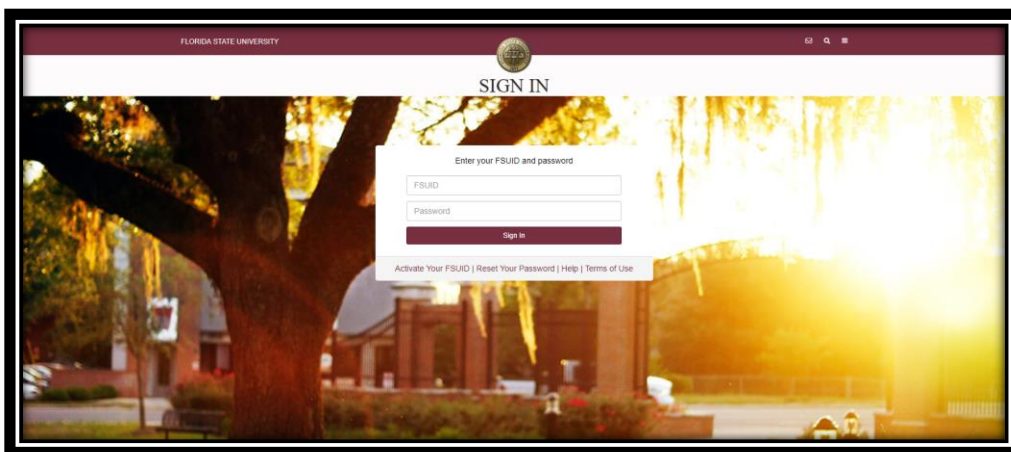
Introduction

Building email campaigns is an essential part of student recruitment. In past CRM models, any message updates you wanted to make had to first go through the Graduate School. With Slate, you now have full control of editing your campaign messages, allowing you to keep your messages over multiple semesters and giving you more time to develop new ones targeted at more specific populations. Want to cater a message to prospective international students? Or students currently working part-time? How about students who fit into both categories? You can do all that right here using Slate's Deliver system.

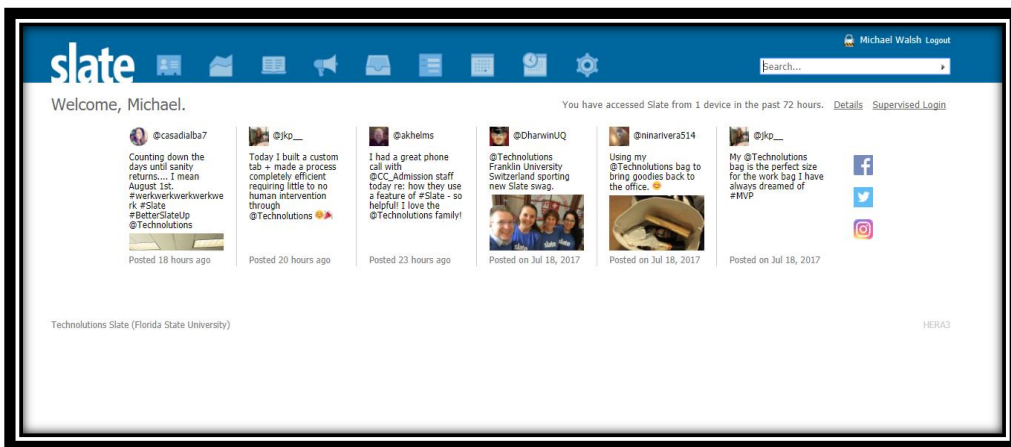
This guide will help you navigate the easy-to-use Deliver system and introduce you to the many new features at your fingertips.

Logging In

To log in, go to connect.fsu.edu and type in your FSUID and password.



Once you Log in, you should see the Slate homepage pictured below.



Population Request Forms

Slate builds email campaigns based on populations. Populations can be defined by details from an application or details from a student's record. Think of them as ways to group, organize, and target the message recipients. To begin a new campaign, simply fill out the Population Request Form and then we will build the population for you. You can access the Population Request Form by following this link:

<https://connect.fsu.edu/register/?id=3a3f2a1d-6908-4646-8650-ef38cfcba032>

The Population Request Form is broken down into six parts outlined below.

FLORIDA STATE UNIVERSITY

FLORIDA STATE UNIVERSITY

ADMISSIONS HOME FRESHMAN TRANSFER GRADUATE INTERNATIONAL VISITOR SERVICES

Population Request Form

Form for grad dept. reps to request an audience/population.

Please fill out this form to request a population for your email marketing. You will receive a notification when your population is built and ready for you to begin building your messaging. If you have any questions, please contact a Marketing Representative with the Graduate School.

- 1 Email Address
- 2 Please describe the population you want to target with this campaign or message.
- 3 Message or Campaign Title
- 4 Number of messages in this campaign.
- 5 Length or Date Range that the Campaign or Message will be active
- 6 Exports Needed

Exports are the data that customizes an email. Examples include "Last Name", "Program of Study", and "Email".

Submit

1. Please enter your email address so we can provide you with access to the population once it is ready.
2. Provide us with the specifics of your population here (remember, it can be as specific as you want!)
3. Title your Campaign here (this is an internal title and will not be seen by students).
4. Tell us how many messages you want in this campaign. When the population has been built, you will have templates ready for each of your messages.

5. If your campaign covers a specific time frame, please enter it. If this campaign is meant to run indefinitely, or if you are unsure when you intend to end it, you can leave this part blank.
6. **Export** is the Slate term for dynamic data. Exports display data that varies from student to student, such as “First Name”, “Email”, “Academic Plan”, etc. List as many as you want on the form and they will be added to your Message Templates, where you can add them as you see fit. In the next section, we’ll show you how to use them.

The form goes to the Graduate School staff once you hit **Submit**. You’ll be notified by email within **48 hours** once the population is complete. If you have any questions regarding your form submission, please contact your marketing representatives:

Courtney Nester: cnester@fsu.edu

Michael Walsh: mawalsh@fsu.edu

***Warning:** make sure to fill out this form as accurately as possible.

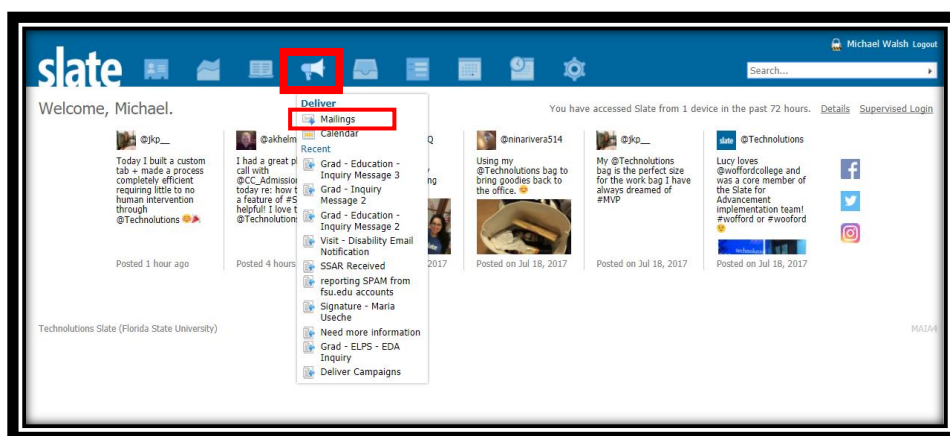
Creating an incorrect population can mean the difference between sending a message to 20 recipients or 20,000 recipients. *

Using Deliver

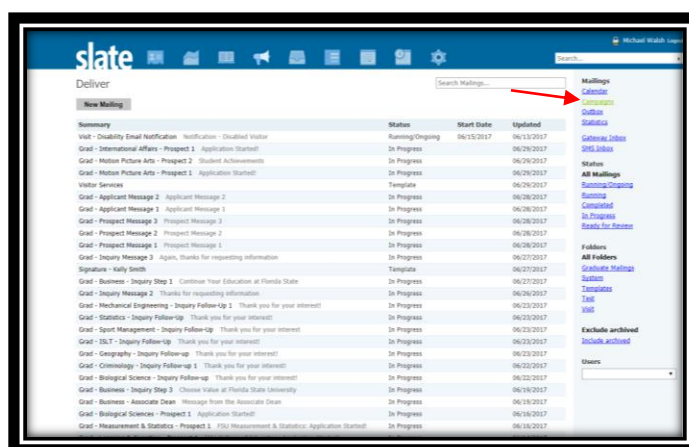
This section explains how to access and build your campaigns into the ideal messages for your intended audience.

CREATING A NEW MAILING

Step 1: Enter the Slate main menu and select **Mailings** (under the megaphone drop-down menu)



Step 2: Here you will find a complete list of all current Mailings. As you can see, it is quite dense. Use the lists in the right-hand column to filter messages. (we will select **Campaigns** for the next step to organize them in alphabetical order).



Step 3: From here, select your department's name from either the left or right-hand side.

The screenshot shows the Slate interface with the 'Campaigns' page selected. The left sidebar, titled 'Campaigns', lists various departments with columns for Name, Mailings, Running, and Updated. The right sidebar, titled 'Populations', lists various departments with columns for Overview, Name, and Updated. Both the left and right sidebar lists are highlighted with red boxes.

Name	Mailings	Running	Updated
G001 - Anthropology	3	0	07/05/2017
G002 - Biology	3	0	06/16/2017
G003 - Chemistry	3	0	05/16/2017
G004 - Statistics	3	0	06/13/2017
G005 - College of Business	4	0	06/19/2017
G006 - Communication	3	0	07/05/2017
G009 - College of Criminology	3	0	05/31/2017
G030 - Teacher Education	4	0	07/14/2017
G031 - Ed Leadership and Policy	4	0	05/31/2017
G032 - Ed Psych and Learning Systems	17	0	07/11/2017
G033 - Sport Management	4	0	06/06/2017
G038 - Mechanical Engineering	3	0	05/17/2017
G040 - Family and Child Sciences	3	0	05/26/2017
G041 - Nutrition	3	0	05/26/2017
G044 - College of Motion Picture	3	0	07/11/2017
G045 - College of Music	3	0	06/02/2017
G046 - College of Nursing	3	0	07/05/2017
G047 - Asian Studies	3	0	07/05/2017
G048 - International Affairs	3	0	07/05/2017
G049 - Public Health	3	0	07/05/2017
G050 - Russian/East European Studies	3	0	07/05/2017
G052 - Demography	3	0	07/05/2017
G054 - Economics	3	0	05/30/2017
G055 - Geography	3	0	05/30/2017
G059 - Sociology	3	0	07/05/2017
G061 - College of Social Work	5	0	07/05/2017
G065 - Interior Design	4	0	07/05/2017
Grad - College of Education	2	0	07/13/2017
Grad - Educational Leadership and Policy Studies	1	0	07/17/2017
Grad - Graduate School	10	0	06/29/2017

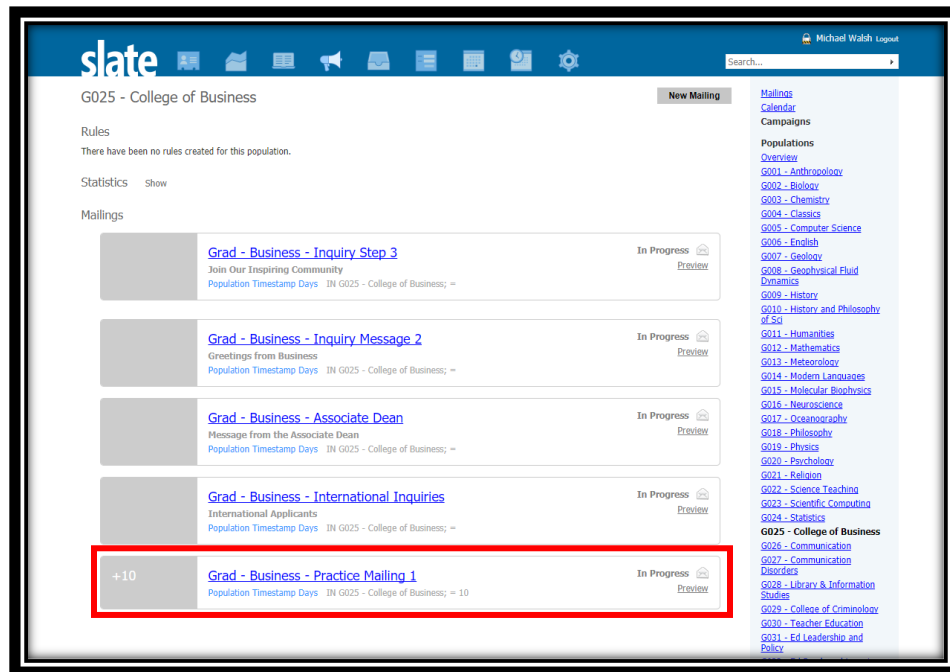
Step 4: After selecting your campaign, you'll find all the messages you requested in the Population Request Form listed out. Select one to continue to the Message Editor.

The screenshot shows the Slate interface with the 'G025 - College of Business' campaign selected. The 'Mailings' tab is active, displaying a list of messages. Each message is marked as 'In Progress' and has a 'Preview' button.

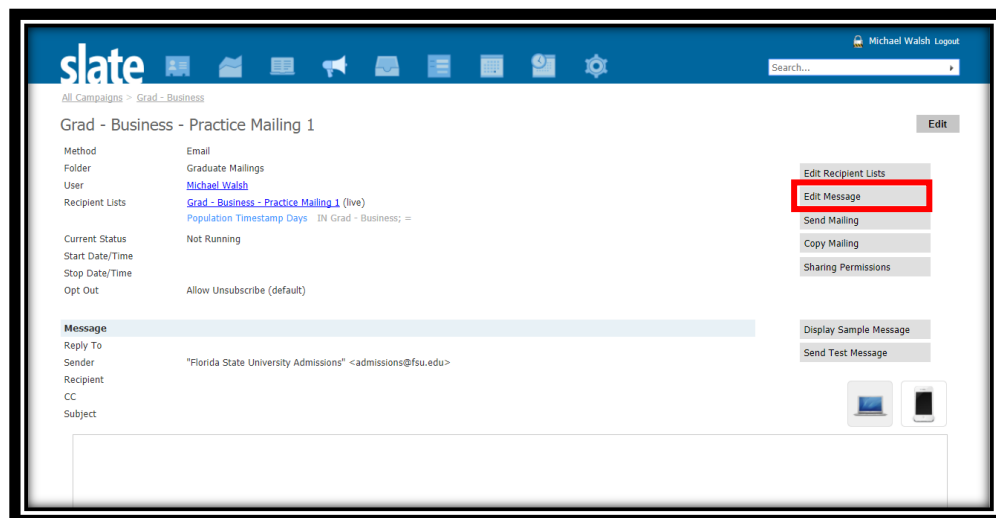
Message Title	Status	Action
Grad - Business - Inquiry Step 3	In Progress	Preview
Grad - Business - Inquiry Message 2	In Progress	Preview
Grad - Business - Associate Dean	In Progress	Preview
Grad - Business - International Inquiries	In Progress	Preview

EDITING MESSAGES

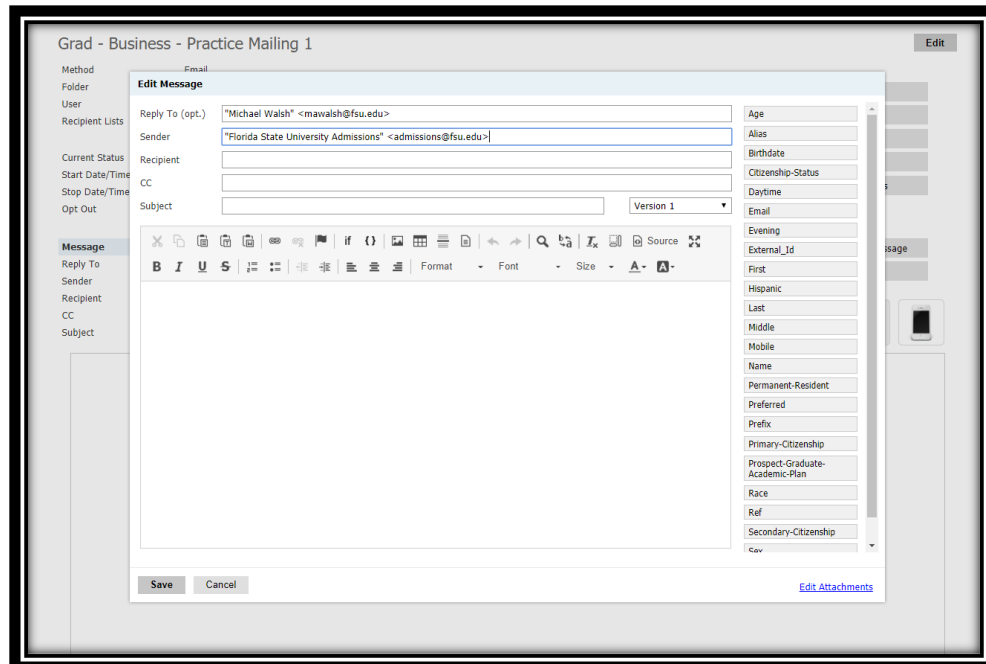
To begin editing, select a message from the list within your campaign.



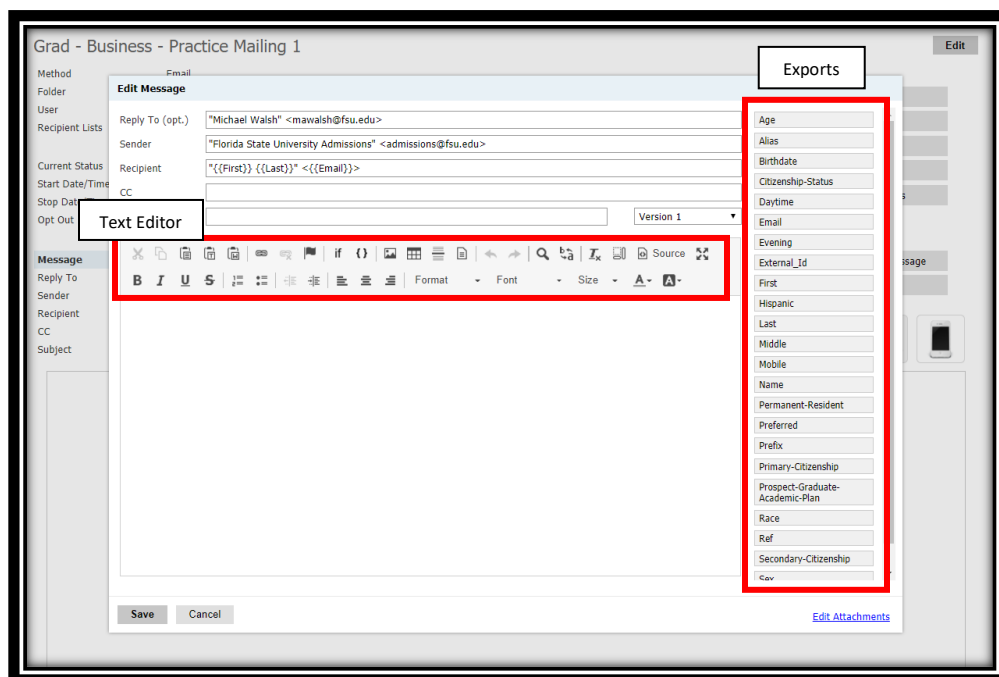
Select the **Edit Message** button in the right-hand column.



You are now in the **Message Editor**. As you can see, Slate offers lots of tools to help you build messages.



Export is Slate's term for dynamic data. You can find all your exports listed in the right-hand column of the editor. These are especially easy to use; simply click on an export and it will appear wherever you left your cursor. To see how they will actually look in the email, click **Display Sample Message**.



Reply To: use quotation marks around text you want the student to see (your name). Place greater than and less than signs around your email address.

Sender: Slate defaults to an Admissions address in all emails. We recommend you remove it and add your own name, title or department. Using a name will make your message less likely to be marked as spam.

Recipient: this is how the student will be addressed when he or she receives this email. We recommend using the “**First**” and “**Last**” exports surrounded by quotation marks as shown below. Make sure to include a space between them. Then, add the “**email**” export and surround it in greater/less than signs like you did in the previous parts.

The screenshot shows the 'Edit Message' window in the Slate system. The 'Reply To' field is highlighted with a red box and contains the text: *Michael Walsh* <mawalsh@fsu.edu>. The 'Sender' field also contains *Michael Walsh* <mawalsh@fsu.edu>. The 'Recipient' field contains *{{First}} {{Last}}* <{{Email}}>. The 'Subject' field contains 'Greetings from the FSU College of Business!'. The interface includes a toolbar with various icons and a list of exports on the right side.

***Note:** you can use the “**Name**” export in place of the “**First**” and “**Last**” exports, but know that this will display the student’s name in “last name, first name” format.

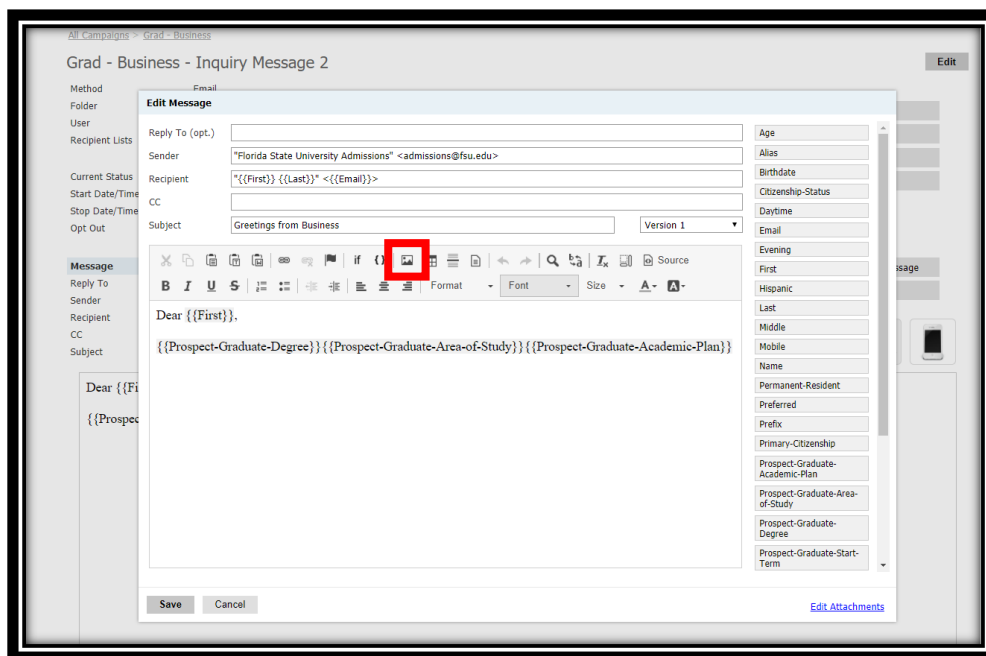
Subject Line: when titling your message, we recommend limiting it to under 50 characters. Subject lines longer than this are too large for cell phone screens and will be cut off. You **MUST** fill out the subject line in order to Save your message.

Now that you have the mailing information set up, it's time to begin building your message! Use the text editor to begin writing it, and make sure to utilize the exports in the right-hand column.

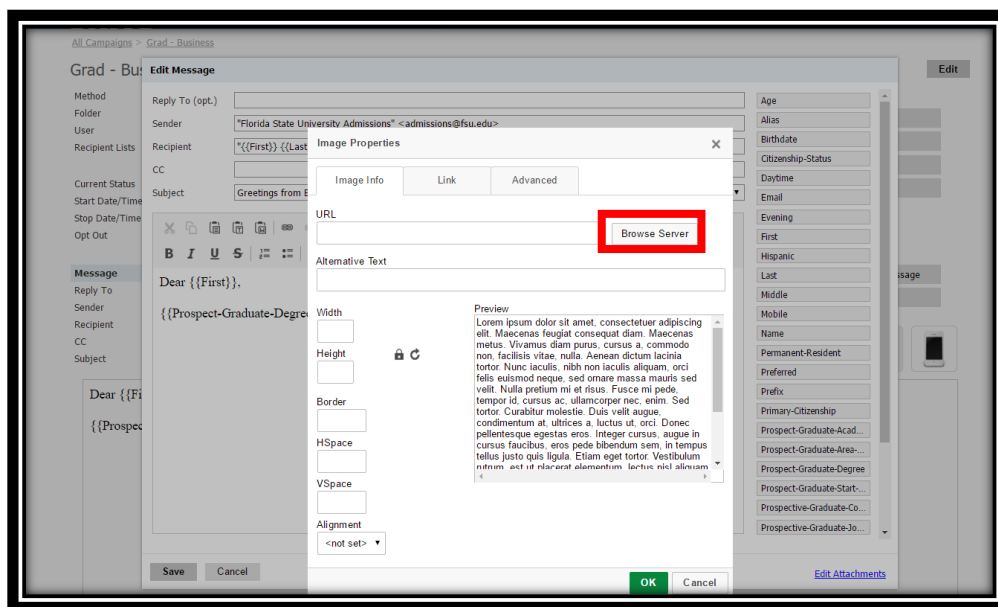
Slate offers many excellent tools to help you build messages. By no means do you need to be an expert on every single one, but knowing how to use each can help you develop your campaign messages. Over the next few pages, we'll walk you through how to use them.

ADDING IMAGES/BANNERS

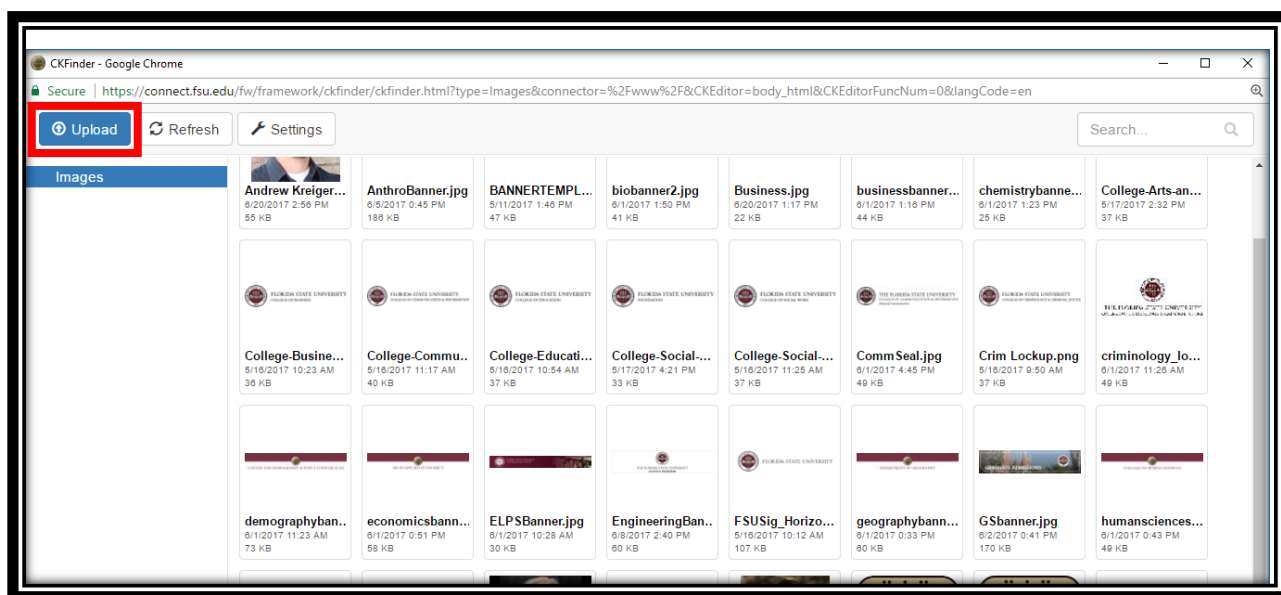
To add an image, select the image icon located near the center of the toolbar.



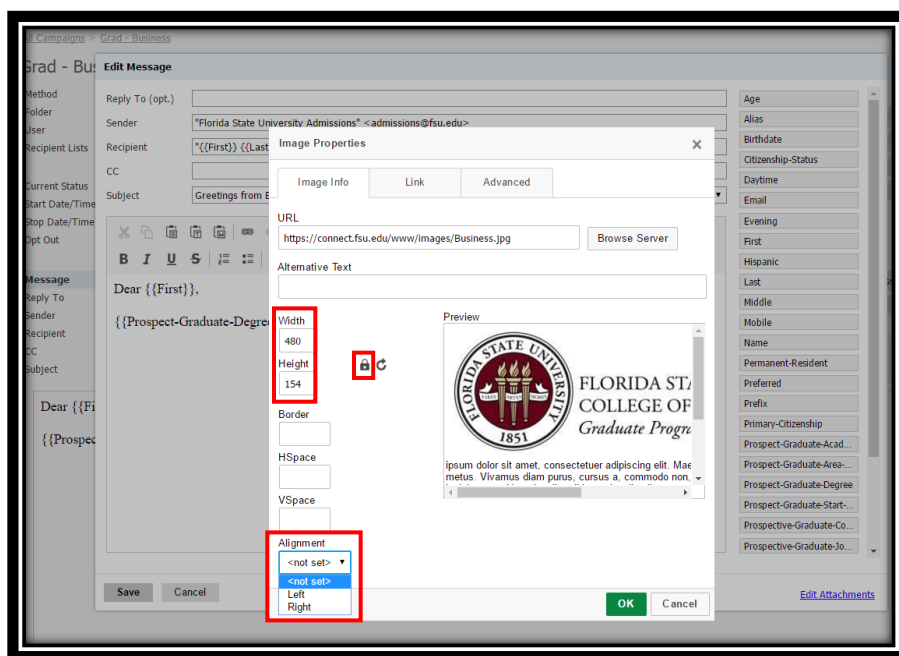
From the Image screen, select “Browse Server”.



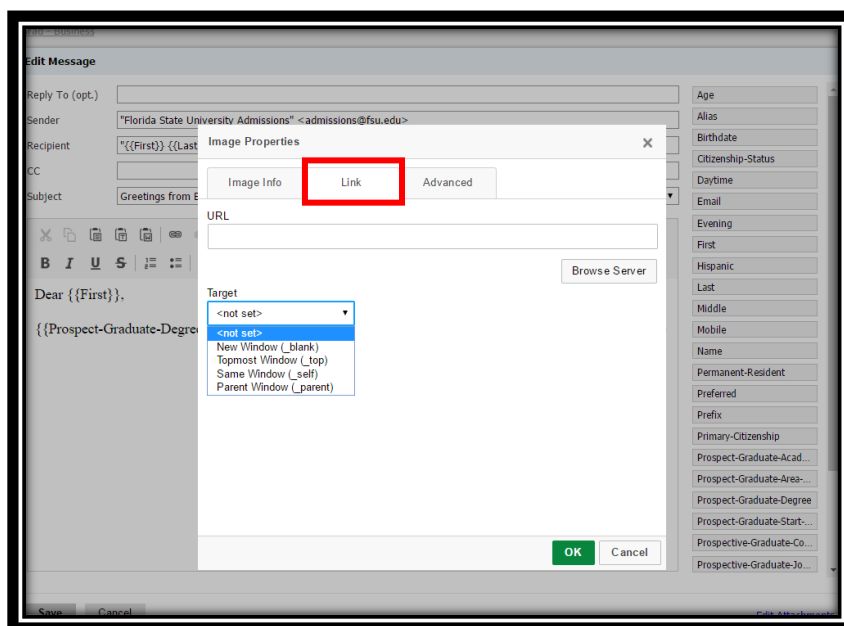
Here you can choose from the images available on the server, or upload an image from your computer using the “Upload” button. Simply double click the image you wish to use.



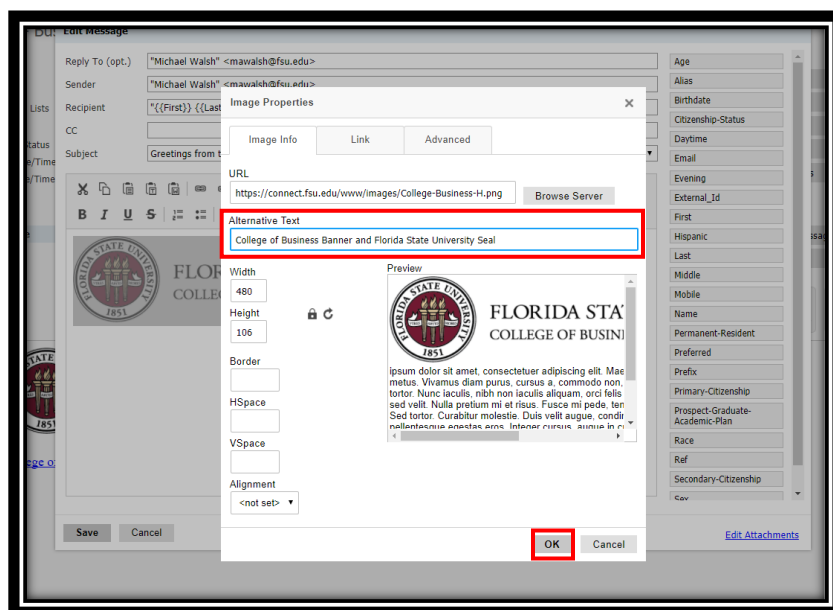
Once you have your image selected, you can adjust the **size** and **alignment** of it from the menu. We recommend setting the Width to **480px**, as this fits well on both desktop and mobile devices. Make sure to select the **Lock** icon in order to keep the image dimensions proportional when you adjust them.



You can also link a webpage to your image. Simply select the link icon at the top of the Image Editor and **paste** the link you wish to use in the URL box. From the Target drop-down menu, we recommend you select the **“New Window”** option. This way, clicking the image opens a new tab on the student’s browser.



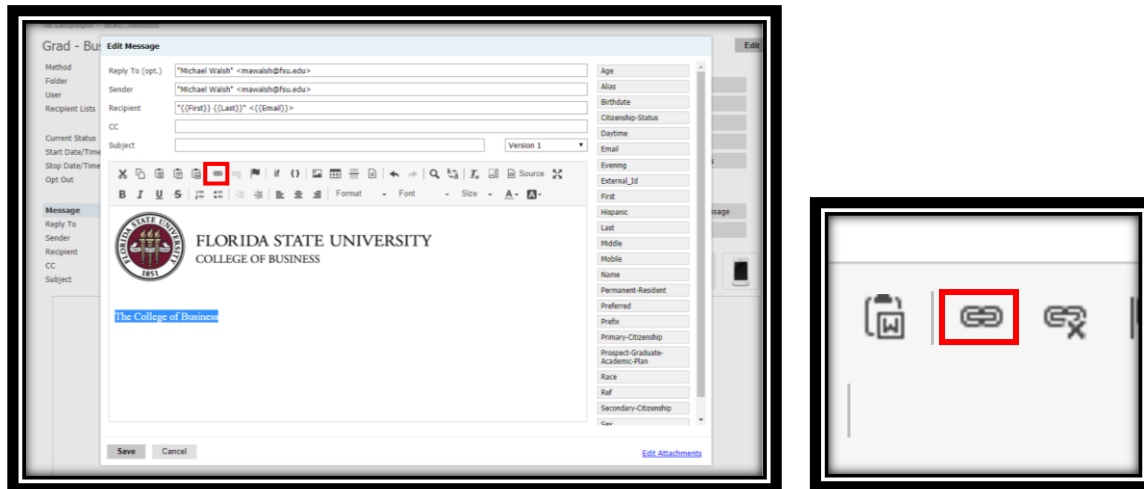
Before you finish, fill out the **Alternative Text** box. Assistance technology reads this text if unable to display the image, so make sure it describes everything about the image as concisely as possible.



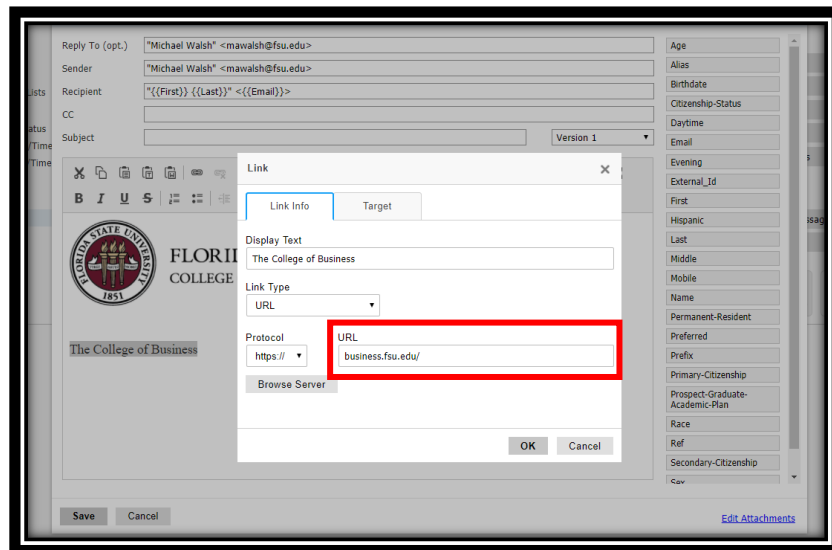
Finally, click **OK** to insert the image in the message as configured.

ADDING LINKS

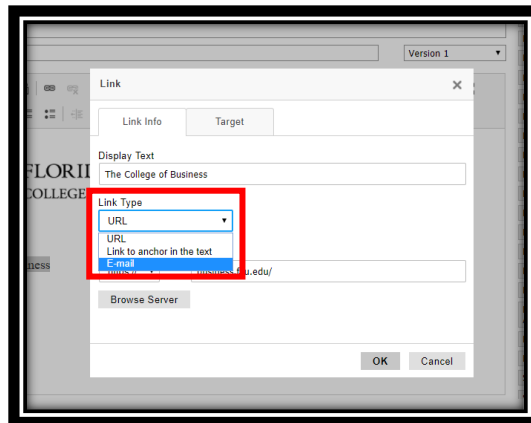
In the Message Editor, **highlight** the text you wish to turn into a link. Then, select the **Link tool** from the toolbar.



In the Link tool, paste the URL you wish to link the text to.

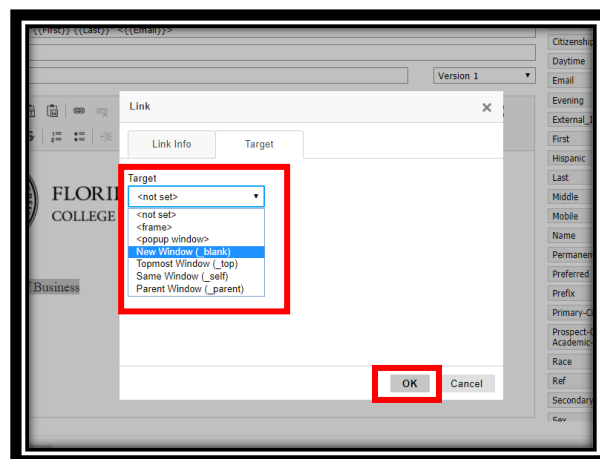


To create a **Mail To** link, go to the Link Type drop down menu and select “**E-mail**”.



Before you close the link tool, we recommend you go to the Target tab and set it to “**New Window**”.

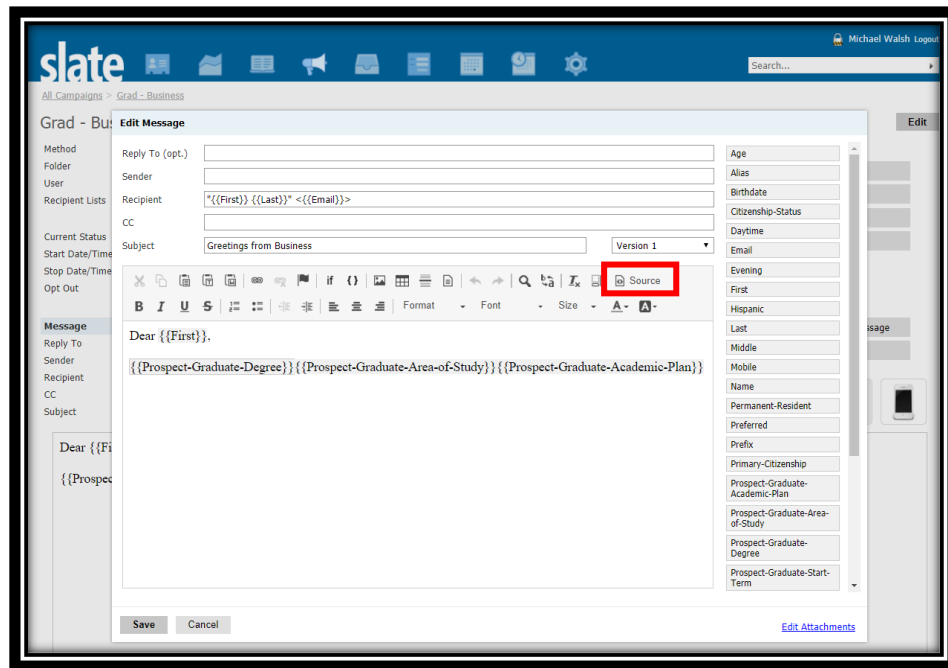
That way, students who click the link will have the page open in a new tab.



Select **OK** to save your link and settings.

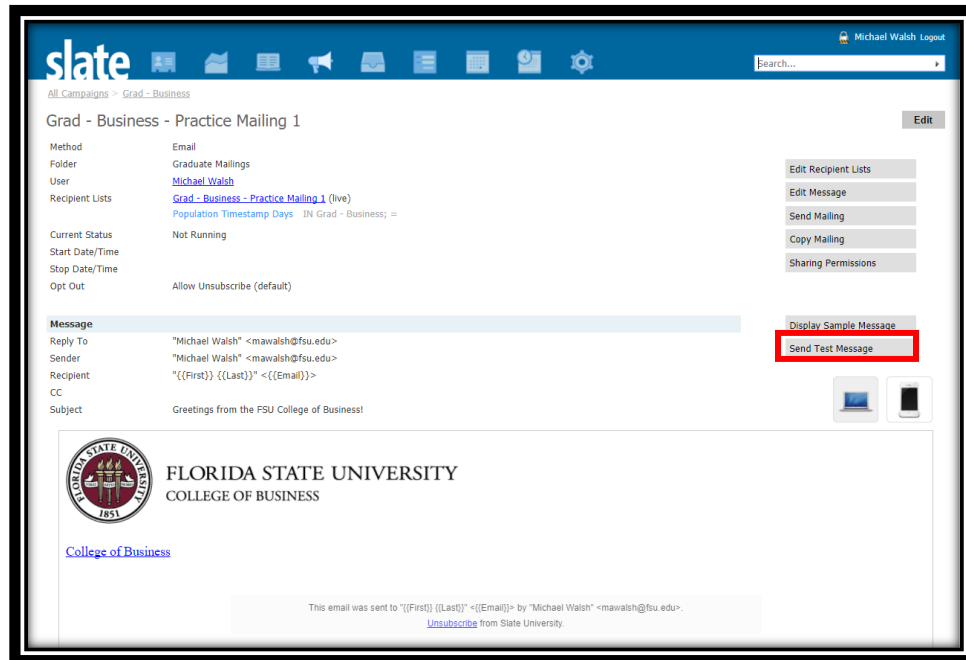
EDITING SOURCE CODE

You also have the option to edit the source code. To open the **Code Editor**, click on the **Source Button**.

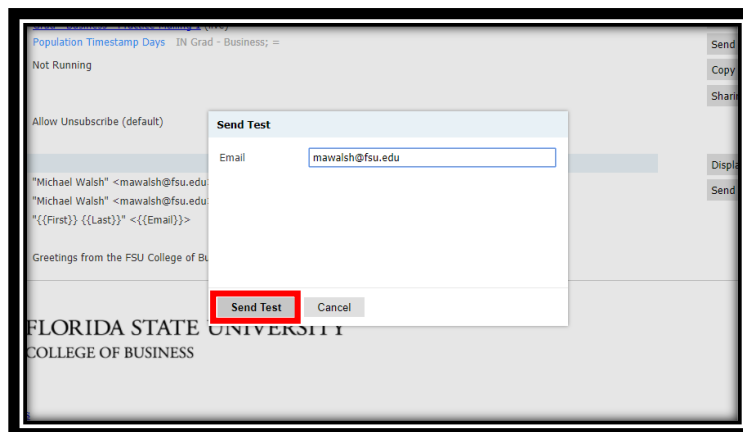


TESTING MESSAGES

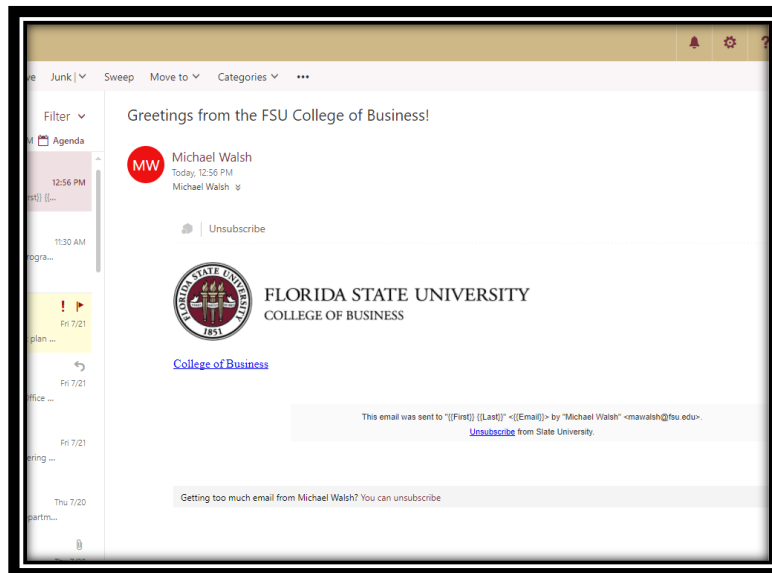
Once you finish building your message, you'll want to test it before mailing it to all recipients. Click the **"Send Test Message"** button.



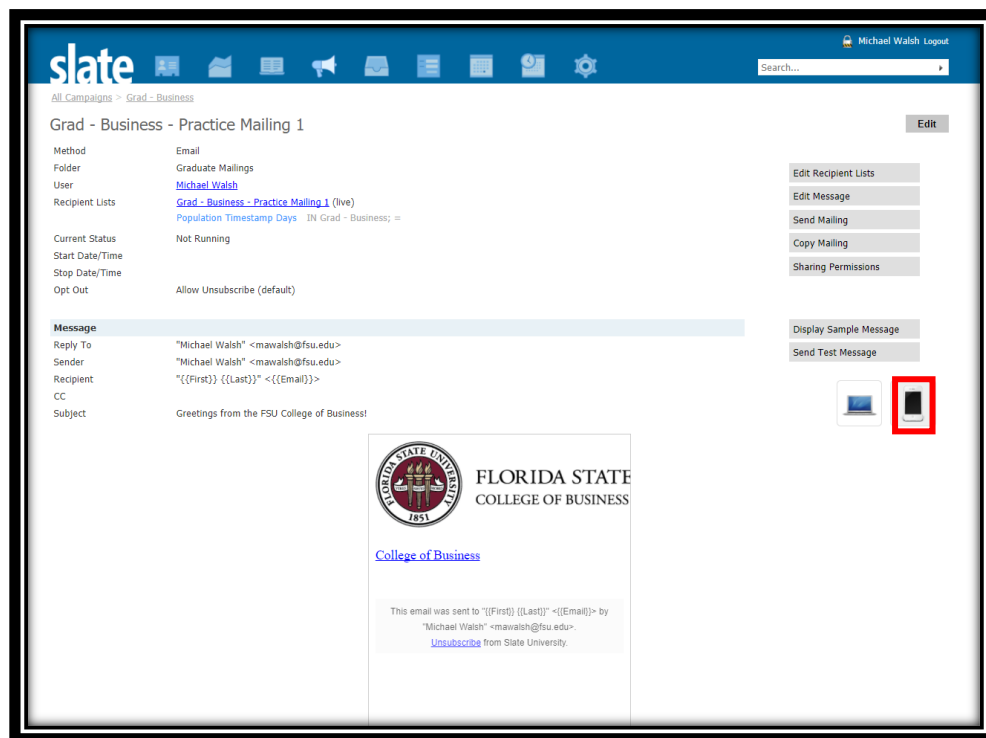
In the text box, enter your email address, and then click **Send Test**.



We recommend you send tests to at least two **different** email programs (Outlook, Gmail, Yahoo, etc.) to see how they may display your formatting.

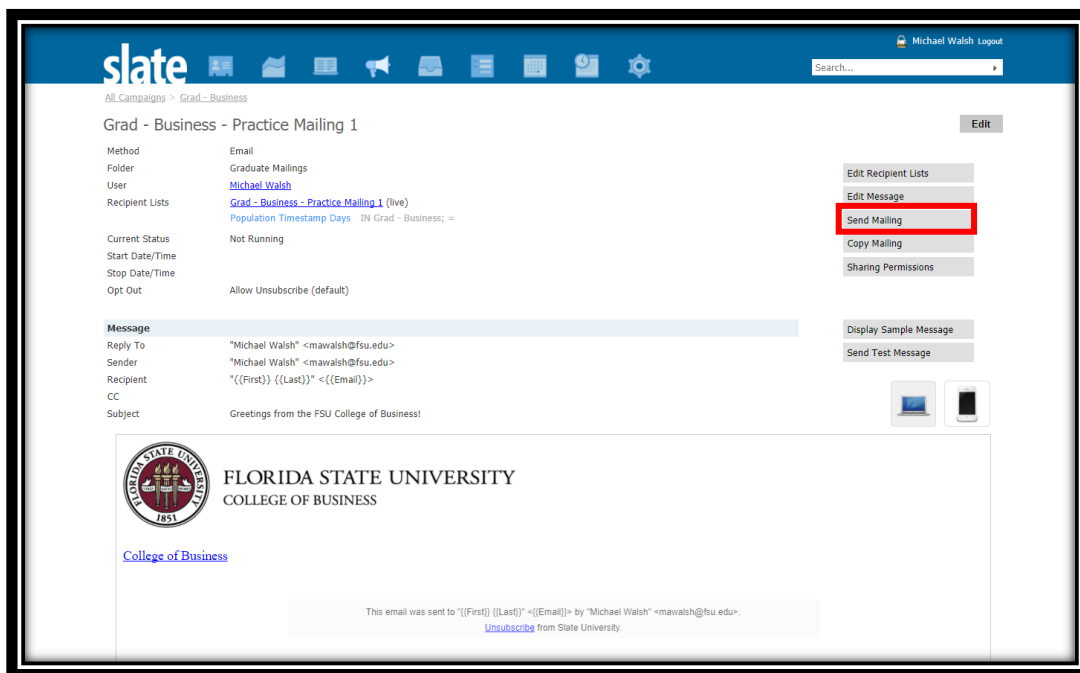


Since most students check their email on their phone, Slate has a mobile preview button.

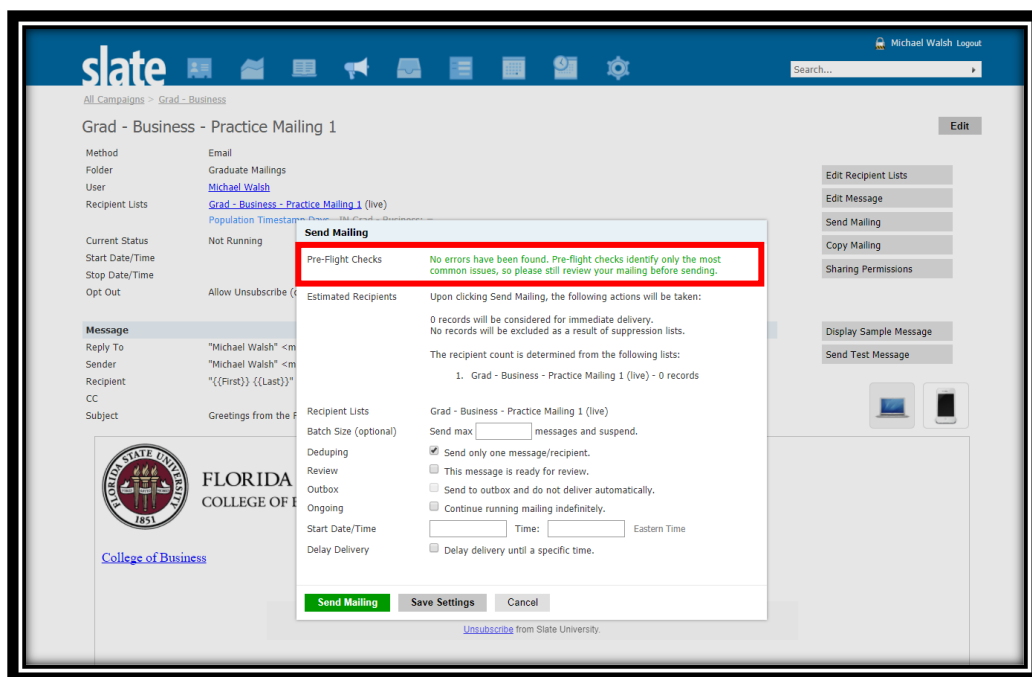


SEND MAILING

Once you've added all your final touches and run all your final checks, it's time to send your mailing! To start, click the "Send Mailing" button in the right-hand column.



This opens the Send Mailing prompt, from which you can control all aspects of how your Mailing will be distributed. At the top, it runs a Pre-Flight Check to ensure there are no errors in your message. Make sure the text beside it is green. If not, follow the instructions it provides to correct any existing errors.



Set a **Batch Size** if you are sending over 2,000 messages at once.

Send Mailing

Pre-Flight Checks: No errors have been found. Pre-flight checks identify only the most common issues, so please still review your mailing before sending.

Estimated Recipients: Upon clicking Send Mailing, the following actions will be taken:
0 records will be considered for immediate delivery.
No records will be excluded as a result of suppression lists.
The recipient count is determined from the following lists:
1. Grad - Business - Practice Mailing 1 (live) - 0 records

Recipient Lists: Grad - Business - Practice Mailing 1 (live)

Batch Size (optional): Send max messages and suspend.

Deduping: ☒ Send only one message/recipient.

Review: ☐ This message is ready for review.

Outbox: ☐ Send to outbox and do not deliver automatically.

Ongoing: ☐ Continue running mailing indefinitely.

Start Date/Time: Time: Eastern Time

Delay Delivery: ☐ Delay delivery until a specific time.

Send Mailing Save Settings Cancel

[Unsubscribe](#) from State University.

Sometimes multiple populations will include the same record. Select the Deduping box to ensure that each email address only receives one message.

Send Mailing

Pre-Flight Checks: No errors have been found. Pre-flight checks identify only the most common issues, so please still review your mailing before sending.

Estimated Recipients: Upon clicking Send Mailing, the following actions will be taken:
0 records will be considered for immediate delivery.
No records will be excluded as a result of suppression lists.
The recipient count is determined from the following lists:
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Batch Size (optional): Send max messages and suspend.

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Review: ☐ This message is ready for review.

Outbox: ☐ Send to outbox and do not deliver automatically.

Ongoing: ☐ Continue running mailing indefinitely.

Start Date/Time: Time: Eastern Time

Delay Delivery: ☐ Delay delivery until a specific time.

Send Mailing Save Settings Cancel

[Unsubscribe](#) from State University.

Make sure the **Ongoing** box is checked if you are running an ongoing campaign.

The screenshot shows the 'Send Mailing' dialog box. The 'Ongoing' checkbox is checked and highlighted with a red rectangle. The dialog includes sections for Pre-Flight Checks, Estimated Recipients, Recipient Lists, and various delivery options like Send max, Send only one message/recipient, Send to outbox, and Continue running mailing indefinitely.

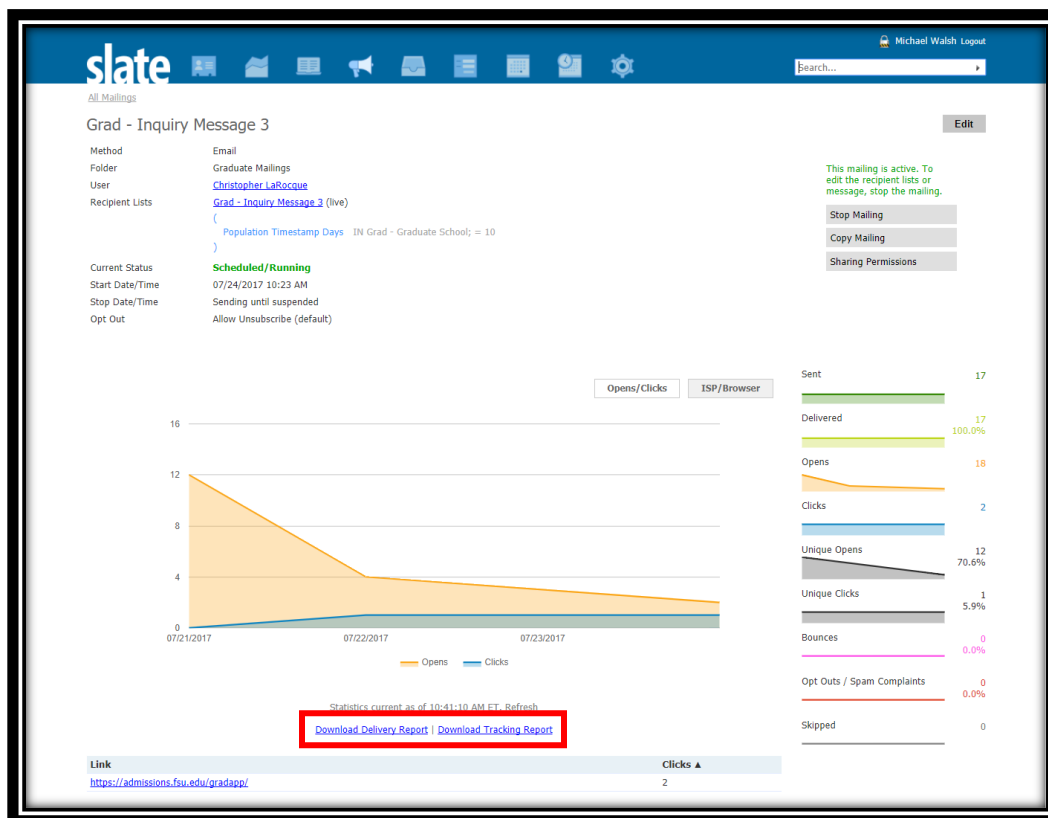
If you select the Ongoing box, it will open up a list of delivery options that allows you to select the days and times your message is delivered. We recommend sending every day of the week and from midday to afternoon, which is when students most frequently check their emails.

The screenshot shows the 'Send Mailing' dialog box with the 'Ongoing' checkbox checked. The 'Delivery Window' section is expanded, showing options for days of the week (Monday through Sunday) and time slots (Overnight, Morning, Midday, Afternoon, Evening). The 'Start Date/Time' is set to 07/30/2017.

Note: Adding a Stop Date/Time is optional. Leaving it blank will keep your campaign running until you manually stop it.

DELIVERY/TRACKING REPORT

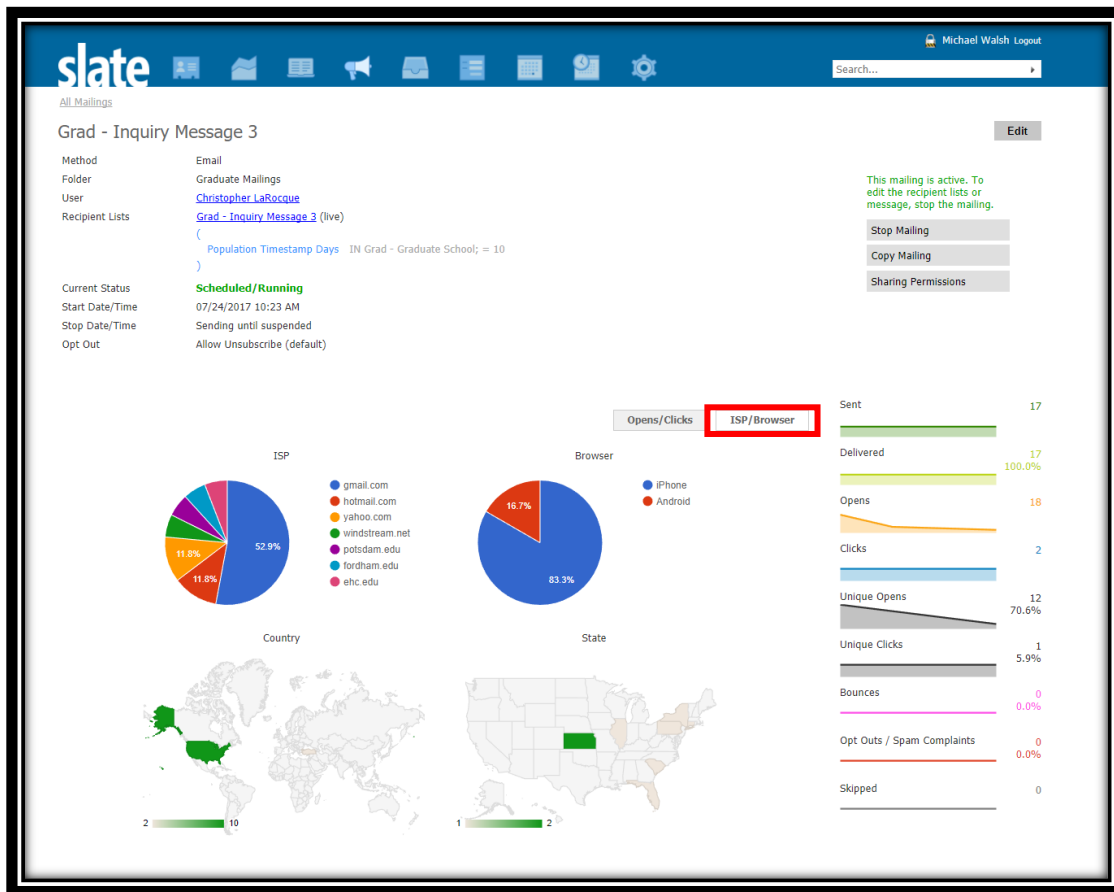
To view the reports and statistics from a mailing, click on the message title. The right-hand column displays how many messages have been sent and opened.



The graph displays the number of Opens and Clicks over the period of time the message has been live. Slate automatically generates reports, which you can **download** using the links underneath the graph. The download comes as a Spreadsheet that displays the names, emails, and statuses of the recipients.

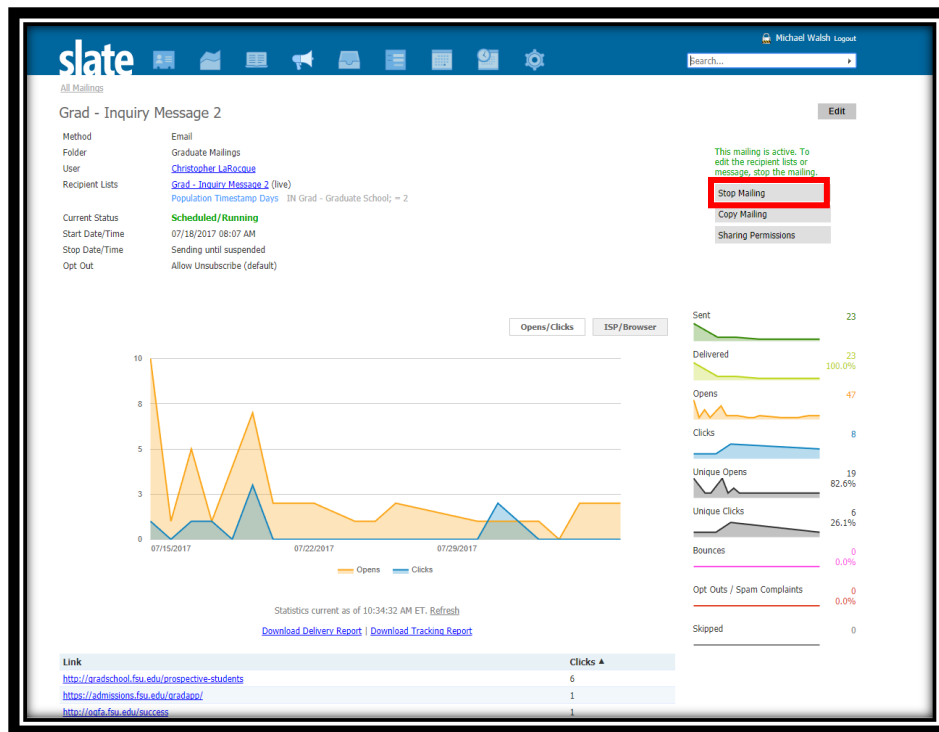
You can also access the ISP chart by selecting the **ISP/Browser** button. Here, you can view which email providers these messages go to most frequently, as well as which platforms recipients open them on.

This section also contains a map displaying which regions have received the most messages.



To set up additional reports, please contact the Graduate School.

To manually stop an ongoing message, select the **Stop Mailing** button at the top right.



BEST PRACTICES

Message Triggers: in the past, we structured campaigns around App Start and App Submit messages. Now, you can develop as many campaigns as you want in whatever structure you think best connects with the students you want to recruit. Having multiple campaigns running to different groups of students can greatly increase your student interactions.

Reports: analyze your reports to learn which of your campaigns are generating the most student interaction. This can serve as a guide for future campaigns and inform you on how to adjust your current ones.

From Address: we recommend that the From Address matches the signature at the bottom of the message. Using a real person helps foster relationships with applicants.

Subject Lines: try to make these less than 50 characters. Anything past that length is less likely to be opened.

Banner Sizing: the ideal message width is roughly 480px for responsive emails from Slate. Check the [Adding Images](#) section to learn how to adjust sizing.

Links: make sure to set each of your links to open up in a new window. This prevents the student from being directed away from your message. For information on how to set this up, refer to the Adding Links section of the guide.

Call to Action: we recommend using a direct call to action in every email. Instruct or ask the student to do something “now” or “today”. This keeps the reader engaged in the process and allows the email to provide a valuable function.

Message Length: 125 words is the ideal message length. Cell phone screens can only fit so many words before the student has to start scrolling, and more scrolling means students are less likely to read the entire message.

Signatures: keep them simple – name, position, department name. Long signatures require students to scroll more, making them less likely to finish reading it. Also, avoid using handwritten signatures; it makes the messages appear more formal and outdated.