Slate CRM - Requests for Emails

What is Slate

Slate is a marketing customer relationship management software. It allows the user to send HTML emails to a chosen audience. While functions are sometimes automated in the Slate CRM itself, others are not. Work with the Graduate School or the Slate data team to find what works best for your situation.

Access to Slate

If you are interested in getting access to Slate for your program contacting the Slate team and your Program leadership will be required.

Request Access Through Enrollment Information Technology (EIT):

[Image: How Can We Help?
Submit a Request to the EIT Help Desk
- Report a General Problem
- New Slate Help Request (including data requests)
- Submit a myWSU Data Request
- Twilio Flex Feature Request
- Add or Change an Online Form
- Submit a New Project Request

Request myWSU Access
To request access to myWSU use the following link to submit a request to the Crimson Service Desk:
- https://ra.esg.wsu.edu/djuro/rs/MyWSU/34

Miscellaneous
- Frequently Asked Questions
- View Our Latest Announcements

New Slate Request
Mailings vs Campaigns

A difference in Strategy

<table>
<thead>
<tr>
<th>Mailing</th>
<th>Campaigns</th>
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<tbody>
<tr>
<td>• A one-time email correspondent</td>
<td>• Re-occurring or scheduled emails that are sent to a target population.</td>
</tr>
<tr>
<td>• A population is usually given by the program to the Graduate School</td>
<td>(These are not set up through the Graduate School.)</td>
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<tr>
<td>in a excel spreadsheet</td>
<td>• All campaign populations are automated within Slate.</td>
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<tr>
<td>• The analytics of the mailing are tracked and reported on Slate.</td>
<td>• Ex. Graduate School Matriculated Students are sent an emails when they</td>
</tr>
<tr>
<td>◦ When requesting a mailing through the Graduate School, you may</td>
<td>accept and before they arrive on campus.</td>
</tr>
<tr>
<td>request analytics after it is sent.</td>
<td>◦ These are scheduled and sent automatically based on pre determined</td>
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<td></td>
<td>variables.</td>
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Request Mailings from the Graduate School

Go to the Graduate School’s Website

• Click Request Help

Request Types

- Finance Questions and Support
- Graduate School Website Questions and Support
- Current or Former Student
- Prospective Student
- Enrollment
- Academic Policy, Bylaws, and Handbooks
- Data and Assessment
- Slate Support

Slate Support Ticket
Please Include:

- A title that states the request
- A description of what is needed i.e. a mailing for a specific audience
- A due date; ALWAYS GIVE ONE WEEK NOTICE
- Any supporting materials like content, flyers, links, etc.

Response from Grad School

We will respond to the ticket with:

- A PDF of the HTML email. This can also include a “test email”
- We will ask for feedback and let you know when it is sent
Audiences/Populations

Programs should consider the recipients of emails.

Programs may provide an excel spreadsheet of students they wish to reach. At the graduate school we have access to current student populations from myWSU.

Request for Information Form

The graduate school uses a Request for Information Form to pull prospective student information.
<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
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- After a prospective student completes the form they are added to a Slate population.
- Student information can be exported by program and the year a student wishes to enroll.