

## CASE STUDY

# Stevenson School

### PREVIOUS PROCESS

#### More systems can mean more problems

Previously, each department at Stevenson School functioned independently using multiple software programs to operate and solve office-specific problems. Providing seamless relationship management continued to be a challenge. Data on parents, alumni, donors, students, and employees was stored in multiple places, sometimes with varying information. External constituents could not easily view or edit past gift and event attendance information.



### SLATE SOLUTIONS

#### Storing data together

By implementing Slate in the Advancement Office, Admissions Office, and Divisional Offices, Stevenson School staff with appropriate permissions could access all relevant information about a constituent. As information sharing became easier and on-demand, more personalized and effective relationship building and individualized communication flourished.

#### Targeted communications

Using Slate's powerful query tool, the School develops granular and targeted communications to multiple, and sometimes overlapping constituents, such as parents, grandparents, alumni, students, and donors. Because they manage admissions, student success, and advancement in a single database, School staff enjoy a comprehensive view of communication from all offices, fostering smarter communication strategies and timelines.

70%  
decrease in time spent  
on board reports

179%  
increase in tracked  
activity in first year  
switching to Slate

75%  
faster online  
gift processing

## CASE STUDY STEVENSON SCHOOL

### RESULTS

#### Consistent relationship building and customized experiences

By consolidating multiple systems into Slate and leveraging Slate's portal functionality, Stevenson School changed the way it manages and engages with its community. Internally, staff have access to more robust and up-to-date information, as well as easier methods of tracking advancement touchpoints from first contact through stewardship. Built-in tasks and metrics further empower staff to utilize this data. Externally, alumni, parents, donors, and volunteers use intuitive custom portals to register for reunions and events, make donations, and perform volunteer duties with self-service tools.

#### Streamlining processes

In its first year of adopting Slate for Advancement, Stevenson School streamlined administrative processes such as gift receipting, EOY summary reports, and volunteer call lists. These efficiencies allow staff to spend less time on data entry and more time focused on communications and constituent engagement. The Advancement Office devotes more attention to its core function—building and strengthening relationships with the current families, alumni, the local community, and beyond.

### READY WHEN YOU ARE!

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