

# Slate for Advancement

## Executive Summary

Over 1,800 colleges and universities trust Slate by Technolutions to manage their relationship with applicants, current students, alumni, and donors. Slate is the preeminent solution for institutions for recruiting students and donors, providing the best combination of qualified services, value for money, and experience.

The feature set is unrivaled:

- Comprehensive CRM/DMS and Gift Management
  - Customized gift management
  - Unlimited online giving forms
  - Recurring gifts
  - Opportunity and proposal tracking
  - Customized soft credit policies
  - Alumni directory
  - Donor self-service portals
  - Bespoke day of giving portals
  - Relationship management
  - Automated and customizable head-of-household rules
  - Unlimited customized salutations
  - Customized contact reports
- Outreach and Communication
  - Fully integrated email, SMS, voice, social, and print communications
  - Automated drip marketing and stewardship campaigns
  - Automated “thank you” and receipt messaging
  - Inbound and outbound communications tracking
  - Data visualization tools to identify prospects
  - Conditional content blocks within messages
  - AI chatbots and live agent chat
  - VOIP telephony services
- Events and Travel
  - Complex event management, including related events
  - Automated event communications
  - RSVP and registration form pre-population
  - Streamlined multi-person registration
  - Seamless payment integration, including combined registration fees and gifts
  - Self-service event cancellation and rescheduling
  - Automated transfer from a waitlist to a guest list
  - Custom event landing pages
  - QR codes and location-aware links for an efficient check-in process
  - One-on-one donor meetings
  - Post-event surveys
  - Aggregation of events and individual meetings into a single trip
  - Built-in expense management with receipt scanning
  - Integration of flight details
  - Export of registrants to mail merge (for name tags, table tents, and more)
  - Badge printing and mobile passes
  - Mobile app
- Reporting and Data
  - Graphical query, dashboard, and report builders
  - Integrated analytics and user-identifiable website tracking
  - Geospatial donor prospecting
- Data Management
  - Document management and digital imaging
  - Digital portfolios, media conversion, and media hosting
  - Real-time web services and data feeds
  - Integrated data transformation systems for imports and exports

- Powerful data deduplication
- Dataset storage of organizations, contacts, alumni, and more
- Integration with all major information systems, finance systems, and ERPs, including homegrown

The service and support are unrivaled:

- Unlimited access to development and engineering resources
- Integrated service and support resources
- Bi-monthly training for onboarding institutions or new users
- User-led regional gatherings occur around the country throughout the year for networking and sharing of ideas
- Vibrant user community forums and annual user conference attended by over 3,000 peers

The security and scalability are unrivaled:

- Integrated GDPR compliance tools
- 99.999% availability for the past 5 years, amounting to less than 5 minutes of total downtime, including scheduled maintenance, during a calendar year
- No security breaches or major outages ever
- Over 2 billion email messages sent every year
- Each institution functions within its own private database, and data is never commingled
- All data hosted in the United States (or Canada or Europe as required) and fully encrypted in transit and at rest
- Direct integration with institutional single sign-on methods, including SAML/Shibboleth, CAS, and more
- Granular field-level and function-level permissions
- Direct SQL access for additional integration
- Capability to push and pull from local and remote SFTP servers

The licensing arrangement is unrivaled:

- Flat-rate and predictable licenses
- Cost based upon approximate total number of full-time undergraduate students
- No separate costs or limitations per-feature, per-support-hour, or per-implementation
- Unlimited emails and users at no extra cost
- Custom-built platform created and supported entirely in-house by Technolutions
  - No separate “apps” required for any function, providing consistent data and user experience throughout
- Partners value the efficiencies gained by using Slate:
  - Any customizations can be made by non-IT staff
  - Mobile access is available for all end-user and administrative systems
  - Self-service capability, including password resets and document uploads, reduces staff time
  - Comprehensive features reduce data integrations and ongoing training requirements by providing centralized administrative activities in one system

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