

Slate by Technolutions

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 to recruit 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
 - Custom 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 messages and receipts
 - Inbound and outbound communications tracking
 - Data visualization tools to identify prospects
 - Conditional content blocks within messages
 - AI chatbots and live agent chat
 - Dynamic and automated donor segmentation
 - 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 the waitlist to the 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 (name tags, table tents, etc.)

- Badge printing and mobile passes
- Mobile app
- Reporting and Data
 - Graphical query, dashboard, and report builders
 - Predictive modeling using machine-learning algorithms
 - 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, etc.
 - 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
- Frequent training for onboarding institutions or new users
- Vibrant user community forums
- Frequent community conversation webinars
- User-led regional gatherings occur around the country throughout the year for networking and sharing ideas
- An 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 five 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 are sent every year
- Each institution operates a private database, and data is never comingled
- 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 such as SAML/Shibboleth, CAS, etc.
- 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 the approximate total number of full-time undergraduate students
- No separate costs or limitations per feature, support hour, or implementation
- Unlimited emails and users at no extra cost
- A custom-built platform created and supported entirely in-house by Technolutions

- No separate "apps" are required for any capability, 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 available for all end-user and administrative systems
 - Self-service capability, including password resets and document uploads, reducing staff requirements
 - Comprehensive features reduce data integrations and ongoing training requirements by centralizing activities in one system

Slate facilitates consolidating multiple systems into a single environment encompassing the wide range and functions of a modern advancement and alumni office, all from a centralized platform. With unlimited data and document storage, users, and communications, Slate empowers advancement offices with the unique opportunity to centralize and manage the full stack of donor lifecycle management, from donor identification and verification to highly customized and segmented stewardship campaigns.

The benefits that result from each feature in Slate are compounded when aggregated into a wholly integrated system. Internal efficiencies created through the automation of previously manual processes enable institutions to focus on building relationships with their donors and alumni, resulting in an increase in both donor engagement and dollars raised.

Gift Management & Processing

Colleges and universities possess unique control over the entire gift management and processing components, along with solicitation tracks, opportunities, and proposals in Slate. Gifts can be added individually on a donor's record, imported en masse using the Upload Dataset tool, or entered directly by a donor either through an online giving form, as part of an event registration, or through a donor's custom gift management portal. In addition to the standard giving fields, additional fields can be added as needed for complete process customization. Recurring gifts can be created on a daily, weekly, every other week, monthly, every other month, quarterly, biannually, and annual basis.

In addition to outright gifts, the pledge and planned gift process can be customized and managed in Slate. Pledge installment schedules are automatically generated and can be individually modified as needed. Gift agreements, copies of important documents, and other documents can be uploaded or scanned directly to a donor's record and associated with a unique planned, pledged, or received gift.

Soft credit policies can be developed and set on relationship type, so the right person receives soft credit every time a gift is entered.

The automation and query capabilities in Slate enable receipts, pledge reminders, thank you notes, and other messages to be run, delivered, and connected back to the donor's timeline. These communications can be automatically segmented and sent through any Slate communication channel, including print, SMS, and email.

Donor & Record Management

Following business rules, custom data points can be set based on an individual record's type, giving history, level of engagement, involvement, and any other data point associated with the record. These records can then be segmented and placed in donor populations for automated and targeted communications.

Additionally, custom data points can be set on individual donor records so that institutions can keep track of a donor's solicitation preferences, affinity groups, board involvements, moves management stages,

and more. Each institution can individually define the decision about the elements to create and store on a record as it relates to its unique processes.

Contact reports let gift officers record interactions with donors and prospective donors, and details of each interaction can be captured, stored, and mapped back directly to a donor's record.

Using the rules editor, gift officers can automatically get a portfolio of donors based on any combination of criteria (such as total FY giving, affiliations, or donor giving levels). Portfolios can also be assigned on an individual and manual basis for circumstances where additional human intervention is required.

Projects (comprised of tasks) aid in the completion of a business process directly in Slate. Tasks are user-aware and displayed to the appropriate staff member and can be linked to specific records in Slate. The associated user can be set either manually or through an automated process that evaluates the task assignee based on custom criteria (such as Assigned Gift Officer). Each task can have a unique status, deadline, and description, as well as task notes that provide an additional level of detail.

Giving Days, Constituent Portals, and Campaigns

Custom-built portals can empower each institution to create its own day of giving, alumni directory, and donor history and management website that leverages the totality of data contained in Slate. Campaigns and appeals can be captured on individual gifts, enabling the aggregation and reporting on the success of institutional initiatives – and the methods of solicitation for those initiatives.

Native Analytics and Reporting

Native analytics and reporting tools provide easy data access for the user, freeing up time for employees to focus on their core jobs of engaging and soliciting the right constituents at the appropriate phase of the fundraising funnel.

The powerful query builder uses a drag-and-drop interface that enables end-users to learn and build queries without IT assistance. Any data point throughout Slate is easily accessible with just a few clicks. This query tool is used throughout Slate, providing powerful capabilities in all Slate functions.

Slate includes powerful reporting tools that enable year-to-year, predictive modeling, and crosstab reports containing data tables, charts, and geo-maps. All data points and communications in Slate are available for reporting, including the first source or contact with a person. Slate can email reports to parties on a scheduled basis.

Slate provides example reports, including funnel reports, daily visit reports, daily gift production, VSE, and more, that can be copied and modified for the institution's business process.

Users can embark on a visual data journey using the Slate Voyager tool. This data visualization tool enables plotting and viewing data spatially. Using the query tool, users can overlay custom content on a map, so institutions can see where records live, where organizations are located, and where events have been held. By overlaying census data from the American Community Survey (ACS), Voyager creates data visualizations for existing territories and explores areas with growth potential. The layers update dynamically as users traverse the map and provide easy visualization of effectiveness across a desired geography.

Institutions can employ any data point in engagement scoring and predictive modeling algorithms. From simple additive models to gate-based methods to polynomial regressions, Slate can calculate which donors have the appropriate mix of affinity, capacity, and propensity to give.

Integrations

Bidirectional file transfers can connect Slate with institutional systems. Data can be made available using real-time web services (with a RESTful API call to Slate or where Slate posts to an external endpoint) and scheduled batch exports that can include delimited, fixed-width, XML, and JSON, among other formats.

Communication & Outreach

Connect with donors through fully integrated text messaging, emails, voice, social, and print communications. Messages can be sent individually or broadcast to thousands of records. The Slate Deliver module provides incredible control over all message components. From initial mailing design and sending configurations to the unlimited segmentation potential, Slate can use all underlining information in your database, reducing the time needed to create your message and increasing the time for executing your higher communications strategy.

Create automated, sequential communications to target specific record populations based on known characteristics. Are you looking to send a series of messages to first-time donors? Population filters enable users to configure messages to send dynamically based on when individual records meet specific criteria. These campaigns can mix and match various communication channels, and a single campaign can comprise a combination of email, text, and print messages.

Any campaign and Deliver message can include dynamic content added through merge fields, Liquid markup, and custom content blocks.

The Slate Inbox feature helps organizations manage multiple office email accounts and incoming text messages. Administrative users can view, reply to, and otherwise manage messages. Automation can route messages to specific users or role groups, and both the inbound message and subsequent replies are automatically captured and associated with the person's record.

Event Management

With the ability to create, schedule, and invite attendees to events, the event management system in Slate consolidates and simplifies office processes into a single, straightforward system. By using templates, recurring events can be created en masse without the need for additional configurations. Slate can handle multiple event registrations with a single form submission with its Related Events feature. If desired, payments and gifts can be collected through the registration process.

Events can be aggregated and displayed on custom event landing pages or embedded directly on institutional web properties. These landing pages can display events on a calendar, a map, or as part of a list. Registrants are empowered to sign up, reschedule, or cancel their registration in an entirely self-service way.

Transactional messages associated with an event can be automatically triggered upon registration, waitlist registration, at a time specified before and after an event, and more. Users can craft these communications to send through any of the multi-channel methods provided by Slate, such as SMS, print, or email.

QR codes and location-aware links can be embedded in event reminder messages for registrants to either check themselves when they are within 2km of the event or to enable staff to scan their codes, automatically marking them as attended.

The Slate Scheduler feature can manage donor meetings and other critical one-on-one events. Templates can be created to manage the registration, communication, and details of individual meetings.

These slots can be added to a trip, and post-meeting report forms can be submitted and connected directly to the person record.

The Trips feature can group multiple events, interviews, donor meetings, stops, notes, and flight information in a one-stop-shop environment.

Events and meetings appear on a map that can include a Voyager overlay, with the details easily accessible by staff members. Points of interest can be searched directly within a trip map (and added as a stop on a trip).

Since Slate operates entirely online and can be accessed through mobile technology, planning, scheduling, organizing, and customizing donor visits, events, and trips are easily managed by those who use them the most, all while on the go, using the Slate mobile app.

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