Slate Communications Handbook

Table of Contents

- Admitted Student Research
- Campaign Renewals
- Campaign Reportal
- Campaign Types
- Collaborators
- Communication Plans
- Cross-Divisional Work
  - Clarity Integrations
  - CollegeXpress
  - Dart/Motivator Process
  - Digital Lists
  - Request Documentation & Resources
  - Script Placements
  - Suitcase-able Resources
- Deliver Emails
  - Daily Monitoring
  - Deliver Builds
  - Email on Acid Proofing
  - Email Template Import
  - Proof Posting & Approvals
- Discovery
- Email Builds and Proofing
- Form Configuration
- Google Looker Studio
- Name Buy Load Process
- Naming Conventions
- Offerings
- Out of Office Buddies
- Population and Rules
- Postcards and Mailers
- Process Overview
- Project Closeout
- Query Libraries
- Report Builds
  - Campaign Metrics Report
  - Data Explorer
  - Funnel & Conversions
  - Search Landing Page Ping Metrics
- Reports Overview
  - Comms Onboarding
  - Funnel & Conversions
  - Search Landing Page Ping Metrics
- Reports Process Documentation
- Resources
- Search Landing Pages
- SHIP Segmentation
- Slate Video
- Strategy Expectations
  - Anti-Melt Print
  - App Gen Print
  - Email Communication
  - Timestamp/Drip Strategy
  - General Print
  - Parent Guardian Print
  - School Counselor
  - Senior Search Print
  - Slate Deliver & Reporting
  - Underclassmen Print
  - Yield Print
- Suitcases for Slate Communications
- Weekly Calls
  - Call Prep Process
  - Call Recap Notes
  - Campaign Performance
  - FAQs
  - Presenting on a Call

Reports Process Documentation [(Back to Table of Contents)]

Offerings [(Back to Table of Contents)]

- ACTIVE Project-based Scope Catalog
- ACTIVE Project-based Pricing Catalog
- Communication Campaign Types
    - Slide Deck

Collaborators [(Back to Table of Contents)]

- Account Management Team
    - Account Managers & Project Managers
        - Hold the partner relationship across business lines
        - Manage client calls, calendar invitations, and client communication
        - Schedules out campaign deliverables and maintains timelines
        - Works with Creative team to assign tasks for copy/design
        - Works with Client Success Leader (CSL) to stay up to date on projects across all divisions (integrated clients only)
        - Assigns the Slate Strategist team with tasks for email scheduling, proofing, and other Slate campaign tasks
- Creative Team
    - Copywriters & Graphic Designers
        - Creates communication plans for all campaigns
        - Writes copy including segmentation and merge fields for the Slate Strategist team to configure in Slate
        - Designs email templates in Stripo and exports a zipped file for Slate Strategist team to build in Slate
        - Designs all print pieces sent via Slate Print or a preferred printer/mail house with merge fields/logic for Slate Strategist team to build in Slate (if applicable) or to strategize on the mailing list
- Name Buy Consultants
    - Consults with partner institutions on search name purchases and works directly with list source agencies to purchase names
    - Sends name files to a Slate Strategist via Google Drive or SFTP site to load and map in Slate
    - Requests reports from the Slate Strategist team to show historical funnel data for the partner institution by geomarket/county/zip

Out of Office Buddies (as of 11/1/23) (Back to Table of Contents)

- Allison - Ben
- Rachael - Nina
- Sydney - Jacob
- Brett - Christine
- Riley - New SS
- Courtney - Megan
- Jess - AJ/AGC

Process (Back to Table of Contents)

- Communications Process At a Glance
  - DISCOVERY: Learning about your institution's goals, voice, and Slate instance
  - PLANNING: Communications plan creation, name buy consultation, Slate configuration
  - COLLABORATION: Collecting feedback and approval on campaign content and design
  - IMPLEMENTATION: Loading names, building deliver campaigns, and launching campaigns
  - ANALYSIS: Regular meetings to review campaign performance and recommendations
- AM/PM Process: INT | Slate Communications - AM Process Guide
  - This is a great, in depth overview of the whole communications partnership process from kick-off to renewal from the lens of the AM/PM team, but it also incorporates most major Slate moments and tasks.

Discovery Process (Back to Table of Contents)

- Kick-Off Call
  - Kick off calls serve as a time to meet the project team and the institution's team members, review deliverables, and establish initial timelines
  - SS/SSAs may not be involved in an initial kick off call if it's an integrated project
  - Main action item: Slate Access
    - Prompt the sales rep or AM to send over the Slate Access Request Form to the client prior to the kick off call
    - https://partner.carnegiehighered.com/register/slateaccessrequest

                - Be prepared to discuss the process on the kick off call and ask if they have any specific questions about granting us external user access
                - If the partner prefers that individual logins be used, please follow these steps:
                    - Partner to tell us what information they need to create user accounts. Typically name, email, title of all Slate Squad team members.
                    - They will send our login information with their Slate URL.
                    - We will submit our slate access form manually in our instance and select No, individual login on the internal field.
                    - Login to the partner instance and change your password from the activation password assigned.
                    - Save the credentials in our personal folder in LastPass.
    - Discovery Visit
        - Discovery visits allow our team to dive deeper into the deliverables with the client, ask Slate related questions, and present initial comm plans
        - This document walks you through what to do in preparation for the visit and what you need to cover during the visit from the Slate perspective
            - This template can be found in the Google Doc templates under "Slate Optimization:Search & Communications" section. Titled: *TEMPLATE* INT | [CLIENT] - Slate Communications Strategy Discovery Questions

Campaign Types (Back to Table of Contents)

- We utilize several campaign types- all can be found in the following document: Communication Campaign Types

Communication Plans (Development & Presentation) (Back to Table of Contents)

- Communication plans dictate communication type, topics, call-to-actions, cadence, format utm parameters, and timelines for all communication campaigns, including drip and non-drip communications
- Carnegie | [Client]: [Academic Year] Slate Communication Plan - communication plan template
    - Sample communication plan
- Prior to the development of the Communication Plan, the SS/SSA will be assigned a task to provide any strategy notes or recommendations based on the initial discovery. Potential items to include in these strategy notes:
    - Recommended CTAs - primary and secondary, if applicable
    - Links to forms or portals that will be referenced in communications

    - Noting distribution of emails (drip vs. ad-hoc for Anti-Melt; Sophomore and Junior for underclassmen)
    - Highlighting any specific campus initiatives that were brought up in discovery
    - Recommendations for markup/segmentation topics
    - Use of any Slate functionality (Slate Video, Ping, etc.)
    - Any notes on broader higher ed landscape items that are noteworthy (FAFSA delays, for example)
    - Highlight any unique selling points for the institution that have come up in discovery
    - Recommendations on campaign launch dates
    - Recommendations for campaign cadence
    - If refreshed:
        - Noting any emails from last cycle that performed well that we should consider moving up in the plan
        - Did we survey prior year students to collect interest? Use this as a segmented email
        - Any notes/recommendations that were shared with the partner during the previous renewal presentation/ACA.
- Copywriter creates the initial draft of the communication plan which the AM/PM will then pass to the SS/SSA for review and to include recommendations regarding segmentation, darted communications, etc.
    - Things to be aware of:
        - Segmentation/conditional logic – is it possible in Slate? Does the partner have the correct fields to make the suggested logic happen?
        - Audience – this is dictated by the population rule, so ensure they are in line with your understanding of the discussed population
        - CTA – Do you have any questions about where those CTAs should link to? Do we need a new form? Which form of theirs should we use?
- Once the Communication Plan is approved internally, it will be presented to the client on an upcoming call by a collaborative effort between the copywriter and the SS/SSA.
    - Communication Plan Process:
        - SS/SSA will kick off the presentation and then turn it over to the Copywriter.
            - Be prepared to give a quick overview of the communication plan, guiding the partner institution through each of the column headers so that they know what they are looking at. Reiterate that the proposed campaign will be on a drip cadence, and explain what that means. If this is a refreshed contract, it is possible that the client is more familiar with the communication plan document and less time can be spent here.
            - Also be sure to share any high level strategy notes that are relevant to the full campaign
            - Example notes for a Slate Strategist to go over on a call with the client, and then the AM/PM passes to the copywriter prior to reviewing the plan:

Underclassmen Campaign Strategy

- *20 scheduled emails and 10 responsives*
    - *12 junior emails*
    - *8 sophomore emails*
    - *Typically we include prospects and inquiries and segment appropriately throughout the campaign*
- *Refreshed communication plan*
    - *Very successful underclassmen campaign last year, capitalize on those efforts*
    - *Pull recommendations from the ACA from the previous cycle*
        - *Increase visual content*
        - *Student voices*
        - *Educate (FAFSA, test optional)*
        - *Visit campus, incentivize when we can*
    - *Forms (over 100 submissions last year!)*
        - *Would you rather?* https://admission.millsaps.edu/register/?id=2cab7a19-d35b-4ab7-aff0-cc1f632eb094
        - *RFI - short form* https://admission.millsaps.edu/register/?id=a2fc8401-928e-41ae-9dcb-e2360962d99e
            - *Rename? Add more context? "By submitting this form, you'll get updates about xyz")*

- The Copywriter will typically review 5 emails at a time, sharing information about email topics, content, and creative strategy behind messaging. After reviewing a set of 5 emails, the Copywriter will pass to the SS/SSA to share strategy notes relating to those emails:
    - Provide brief overview of segmentation and/or Dart strategy
    - Reiterate audience, purpose, and goal (main CTAs) of the mailings
        - Emphasize that the CTAs will, in most emails, be displayed as a button which they'll see in the templates they'll approve
    - Note any Slate strategy pieces employed
- Confirm/discuss campaign start and end dates with collaboration of AM/PM
- Additional details can be found in the Slate Communications - Accounts Process Guide
- Recording of a Mock Comm Flow Presentation (beginning at 2:00)

- Once approved (either on the call or via Asana), the creative team will work on copy using this plan as a guide, and the SS/SSA team will use this plan to build and schedule emails.
- Send Schedules
    - The Accounts team will take the lead in building out a send schedule according to established launch and end dates, using this documentation which outlines best practices in send cadence. They may ask to collaborate with us in building out these send schedules for particular clients if needed.

    - Once the send schedule is built out in the communication plan document, the AM/PM will confirm with SS/SSA that the cadence and send dates look good. Once confirmed, the AM/PM will build out Asana send tasks to match communication plan document.
- Other Communication Plan Notes:
    - Take your time! Especially if this is the first Communication Plan presentation with the client. If you need to extend the call a bit to allow more breathing room, feel free to work with the AM/PM to do so.
    - Record the presentations and share with the client afterwards
    - With more established clients, send comm plans ahead of time and keep more of a conversation rather than a presentation if the relationship warrants.
    - With renewal comm plans, call back to ACA recommendations
    - This should be a shared presentation, 50% copywriter and 50% strategist
    - Communicate that we can be flexible and that this plan is 100% customized to the institution. However, at the point of an approved comm plan, email topics are locked in.
    - This will be updated and the client can look at (and should reference!) anytime.

Strategy Expectations (Back to Table of Contents)

Jump to:

- Slate Deliver & Reporting
- Email Communication
- Timestamp/Drip Strategy
- General Print
- Senior Search Print
- App Gen Print
- Yield Print
- Anti-Melt Print
- Underclassmen Print
- School Counselor Print
- Parent/Guardian Print

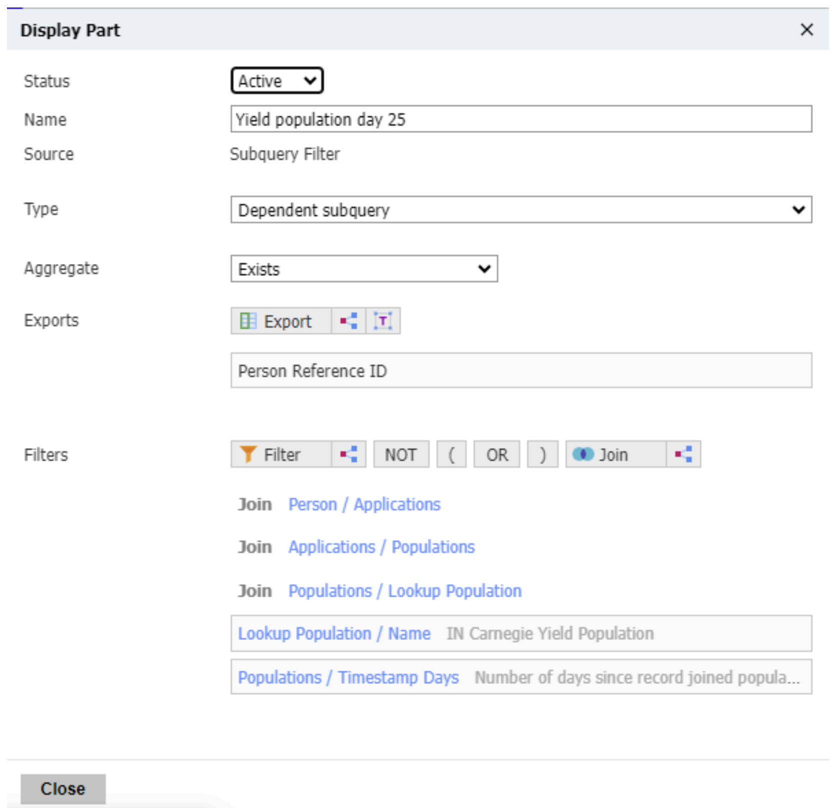
As a Slate Communications Strategist there are a few different types of strategy you are expected to provide to your clients. Strategy should be provided before campaign launch via the communication plan, mid-campaign based on campaign performance, and for a campaign refresh based on previous year's campaign performance. General items are outlined below but you can find a comprehensive list of recommendations in this document: INT | 2022-23 Slate Communications Annual Campaign Assessment Recommendations.

You can keep notes of all strategy related items per client in one document using this template: INT | [CLIENT] Slate Optimization Strategy

- **Slate Deliver & Reporting Strategy**

  This list below is not comprehensive as strategy is a gray area that can vary depending on the situation and the factors affecting the situations.

- Recipient List Configuration
    - Student campaigns should be Person or Application scoped
        - In a subquery filter, join to Population to add in the population name filter and the timestamp day filter
    - Parent/Family email recipient lists should be Relation scoped
        - In a subquery filter, join Person (or Person & Application for application scoped populations) then to Population to get the timestamp day of the student. For application scoped populations, make sure you're joining the Population join from the application join and not from the person join.
        - Be sure to export Person Reference ID for person scoped populations or for app scoped populations export Person Reference ID or Application Reference ID. (screenshot below)



        - Parents should NEVER be CC'd on student communications. If parents are CC'd on emails to the student and the parent receiving it Unsubscribes, they will unsubscribe/opt-out the student and not themselves.
- [Source Format Configuration + mapping]
- Configuration of liquid markup and content blocks
    - existence exports
    - translation tables
    - Utilizing dynamic content blocks when appropriate

    - Including additional segmentation in reports as appropriate for the client
        - Dart/Motivator
        - Origin Sources
        - Student Location
        - Major
        - College
- **Email Communication Strategy**

  This list below is not comprehensive and some items are best to recommend at the start of a campaign (during communication plan creation) and some of items can be pivoted on mid-campaign.
    - Pre-Campaign Launch - determined at the beginning of a contract or after renewal based on previous year's recommendations.
        - Usage of templated, plain text and newsletter style templates
        - Email cadence
        - Email topics
        - Email order
        - Usage of text messages
        - Email segmentation - which emails should be segmented and how they should be segmented. In this document you'll find a list of data points that can be used for segmentation: Carnegie | Slate Communication Segmentation
            - Usage of Liquid Markup and Content Blocks
            - Usage of Existence Exports to combine data points
        - Campaign launch and end dates
        - Reducing content volume - would need to be communicated to DXD
        - Usage of Slate Video or of video assets
        - Determining the Sender & Signature of the email
            - I.e. Staff Assigned vs Admission Office
        - Increasing personalization and segmentation
        - Increasing multi-channel communications
    - Mid-Campaign Pivots
        - INT | Campaign Optimization Approaches
            - Recording of the review of the above deck. Passcode: +g8&.UZT
        - Usage of one-off emails
        - How and if to update subject lines
            - Usage of Emojis and student's name
        - How and if to change button placement
        - How and if to change button language
            - I.e. change button from saying "Learn More" to "Learn more about being a Warrior"
            - Ping engagement

- **Timestamp/Drip Strategy**
    - **General Timestamp Strategy**

When developing a drip campaign, it is preferred to use the "TimeStamp Days" filter. This filter selects a specific count of days that a student has been in a population. It is the least computationally taxing method of selecting students based on time in a population.

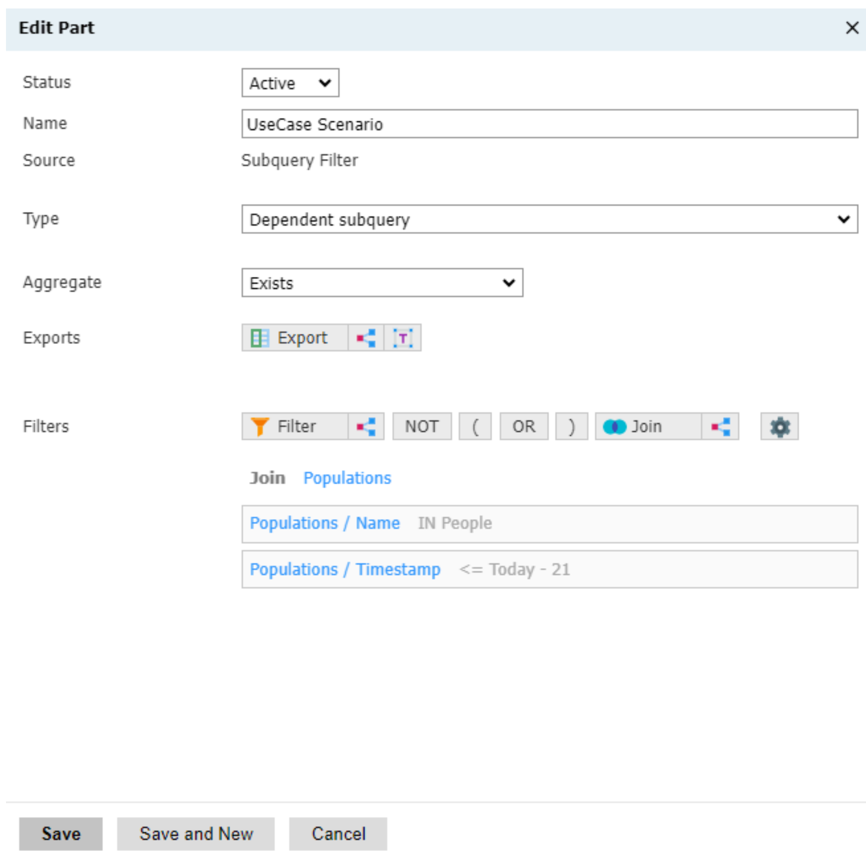
- When filling out the TimeStamp Days filter, the only required input is the numerical value of the days that the student has been in the population.
    - Example(s): 22, 87, 111
- Drip schedules are originally developed by the AM/PM and later sent to the SSS/SS for approval. Take note of holidays, resource intensive campus events, or other dates that would be inopportune for a large mailing to go out.
    - Be cognizant of delivery windows as well when setting up drip campaigns, as these delivery windows are based on Eastern Standard Time, and a client may be on the West Coast.
- Typically, it is recommended that there are 7-14 days in between sends, although this is a client-by-client preference and campaign dependent.

    - **Specialized Timestamp Strategy**

*Under certain circumstances, a send schedule may fall behind. This is an opportunity to utilize the "Timestamp" filter. This filter selects students that have been in a certain population for a certain count of days **plus** any additional days. It acts as a "catch-up" and can be used to mitigate slight alterations to a send schedule. However, it is more computationally taxing, and is therefore not preferred over the "TimeStamp Days" filter when available.*

- When filling out the TimeStamp filter, It is required to input a string format to encapsulate the intended audience. There are also options for boundaries of computation.
    - Boundaries Examples: =<, <, =, >, >=
        - These determine whether to select students that have been in a population for less than (>), greater than (<), less than or equal to (>=), greater than or equal to (=<), or exactly, a certain count of days (=).
    - String Example(s): Today - 22, Today - 87, Today - 111
        - This string collects students that have been in a population a certain number of days past the current system date.

- Use Case Scenario: A client is three days behind their email #3 send. The original email #3 was to send 21 days after a student has entered the population. Rather than readjusting the entire send schedule, the Timestamp filter can be used.
    - Pictured below, the subquery filter joins to the population base, and from there the specific population name and timestamp/timestamp days becomes available.
    - By using Timestamp <= Today - 21, all students who have been in the population for 21 days or longer will receive the communication, effectively catching up all students who missed the original 21 days send window, while any future students receiving the communication on their 21st day in the population as the boundaries selected are “Greater than or equal to”



- **Print Strategy**
    - **General Print Strategic Recommendations**
        - Using mailings that don’t require an envelope
        - 39 different options for self mailers through Slate Print

        - Saves thousands of dollars not using envelope and depending on the type of paper
        - If it does require an envelope, consider a poly bag. Clear envelope instead of regular envelope. Has higher open rates as you can see the item. More likely to stand out for highered education as this isn't often used in this industry.
            - Can tint them as well as keep them clear.
            - Waterproof and very protective.
        - Paper selection
            - Consider asking Miterra EDU to send a client a sample pack of paper to select the most cost effective within their standards as well
            - 120# dull cover is more economical than 100# opaque
            - Protected more in the USPS scanning process as well
        - Be more concise with content to cut down cost
            - Strong call to action with a QR code
            - Sense of urgency
        - Minimum of 200 to send with the Non-Profit pricing
            - Consider doing a modified drip to meet this minimum
                - Go into outbox once a week to hit approve, but let the query do the work and pull students to send to outbox at the appropriate time
        - Off-set is more economical than digital, however digital should be used if the mailing uses exports from Slate
        - Be aware of price breaks when they are on the edge of a band within the quote document. For example, they might pay less for 2,500 than 2,000
        - Personalization increases the response rate
            - Using only name, 44% response rate
            - Using name and full color, varying photo, varying content is 500% more effective
            - When sending missing materials print pieces, use an "as of" date to reflect the date which this was pulled from Slate and have the QR code send to the portal so students can see their missing materials updated in real-time.

Specific strategy is outlined by campaign type below.

- **Senior Search**
    - Topics
        - Informational PC/Mailer - location, academics, map infographic, student life
        - Push to visit - upcoming open houses, events, campus tours (Why INSTITUTION)
        - Push to apply for later in the cycle (affordability/FAFSA information, stats)
        - Value & ROI of INSTITUTION

        - Variable QR postcard directing to personalized search portal
    - Recipient Lists
        - Prospects within a certain mile radius from campus
        - Prospects who have opened AND clicked on X number or more emails but have not inquired
        - Prospects by market (primary, secondary, tertiary) or state
        - Prospects who have pinged on a specific page (academic page, campus life pages, webpage with RFI) within 60 days
        - Students of color or certain gender for institutions with specific DEI goals
        - First generation
        - Does the institution have any scoring system? Engagement weighting, model scoring, etc.
        - Slate Print Segmentation
        - Existence exports and/or translation codes to do in-state/out-of-state & academic segmentation
        - Darts/Motivators
- **App Gen**
    - Topics
        - Push to apply before deadline - incentive to apply by deadline (maximum or priority scholarships, faster decision, etc.)
        - Career & Professional Development opportunities at INSTITUTION (mentorship, internships, tutoring, workshops)
        - Message from {{Staff-Assigned}}, Why you should apply to INSTITUTION - first year support
        - Location focused - opportunities, things to do on and off campus, why you belong at INSTITUTION (segmented by in state versus out of state)
        - Alumni Outcome - message from Alumni
        - QR Postcard, push to apply
        - FAFSA submission push (or send to those that haven't applied, but we have their FAFSA)
        - INSTITUTION value statement
        - Visit/Event invitations
        - Follow up to those that counselors connected with at a college fair or event through travel season.
    - Recipient Lists
        - Inquiries within a certain mile radius from campus (50, 100, 150 miles)
        - Inquiries who have opened AND clicked on X number or more emails but have not applied
        - Inquiries by market (primary, secondary, tertiary) or state
        - Inquiries who have pinged on a specific page (apply page, financial aid page, webpage with RFI) within 60 days
        - Students of color or certain gender for institutions with specific DEI goals

        - First generation
        - Does the institution have any scoring system? Engagement weighting, model scoring, etc.
        - Slate Print Segmentation
        - Existence exports and/or translation codes to do in-state/out-of-state & academic segmentation
        - Darts/Motivators
- **Yield**
    - Topics
        - Current Student Spotlight, Why I Chose INSTITUTION (Why you should deposit)
        - Student Outcomes/ROI/Stats - internship opportunities (for both students & parents)
        - Admitted Student Checklist - next steps
        - Congratulations from graduating class - Welcome incoming class of XXXX (May/June send)
        - Student Success at INSTITUTION - Academic and Counseling Resources, Financial aid/Affordability resources
        - Accepted Student Day event - push to deposit & visit
        - Poster with QR code to Deposit (24x18 poster folds to a 6x9 postcard)
    - Recipient Lists
        - Usually, sending to all admits is a great strategy since these numbers are manageable. However, if the partner is looking to trim this, below are some ideas!
        - Accepted students who have opened AND clicked X number of emails but have not yet deposited
        - Local accepted students (50-75 mile radius from campus) pushing to visit campus if they have not yet already, and pushing to deposit
        - Students who said Yes or Maybe on an already sent YNM form
        - Slate Print Segmentation
        - Do they have any custom application fields that are useful for this?
        - Darts/Motivators
- **Anti-Melt**
    - Topics
        - Orientation information - push to register
        - Checklist magnet postcard (tuition payment, housing payment, registering for orientation, FAFSA) summer checklist
        - Notecard - Welcoming {{Preferred}} to campus from admissions office (with window cling/sticker)
        - What you can look forward to this Fall - fall activities, traditions, etc.
        - Res Life/Campus Life
        - Message from a current student

        - Poster with QR code to a "next steps" checklist (24x18 poster folds to a 6x9 postcard)
    - Recipient Lists
        - Typically all students receive print at this point, but for any topic specific postcards, targeting students who have not submitted their housing deposit or filed their FAFSA
        - If a student has deposited but has not yet visited campus, segmenting to those students pushing to get to campus or register for orientation
        - Slate Print Segmentation
        - Darts/Motivators
- **Underclassman**
    - Topics
        - Fun/informational postcard (Slate sticker postcard)
        - Why INSTITUTION - campus life, location, distinctives - push to visit/connect on social media
        - Scavenger hunt - QR code to form - incentives to complete form
        - Student quotes - location, academics, resource focused
        - Visit/Event postcards
        - Checklist PC (to send later in the spring)
        - Variable QR postcard directing to personalized search portal
        - Financial Aid/FAFSA (educational and high level)
    - Recipient Lists
        - Prospects/inquiries within a certain mile radius from campus (50, 100, 150 miles)
        - Prospects/inquiries who have opened AND clicked on X number or more emails but have not inquired/applied
        - Prospects/inquiries by market (primary, secondary, tertiary) or state
        - Prospects/inquiries who have pinged on a specific page (apply page, financial aid page, webpage with RFI) within 60 days
        - Slate Print Segmentation
        - Darts/Motivators
        - Existence exports and/or translation codes to do in-state/out-of-state & academic segmentation
- **School Counselor**
    - Topics
        - Upcoming events for your students to register for
        - Financial aid/Affordability at INSTITUTION for your students
        - How to prepare your juniors for senior year
        - Thank you note - supportive message from INSTITUTION
        - Resources at INSTITUTION for your students transition
        - Poster for counselors to hang in the counseling/guidance office with QR code to RFI

    - Recipient Lists
        - If there are several counselors at one HS, try to dedupe the list to ensure 1 print piece is going to each high school versus 3 counselors receiving 3 postcards at 1 high school
        - Slate Print Segmentation
        - In-state/OOS, especially if scholarships are different, or if there are any FA incentives for local students.
- **Parent/Guardian**
    - Topics
        - Resources/Counseling & campus safety for your student
        - ROI/Stats info - Alumni Outcomes
        - Supportive message from admission counselors - your student belongs here
        - Visits/Events - anything specifically for parents? Even virtually?
    - Recipient Lists
        - Mirror the student lists for the campaign associated
        - Slate Print Segmentation
        - Parents of first gen students vs non-first gen

Naming Conventions (Back to Table of Contents)

- UTM Naming - Carnegie | Communications - UTM Code Builder
    - Source: carnegie-slate
    - Medium: means of communication (email, postcard, letter, etc)
    - Term: Email subject matter/topic
    - Campaign: Campaign Name
    - Content: Campaign Name + Email Number
    - Example
        - Source: carnegie-slate
        - Medium: email
        - Campaign: app-gen
        - Term: campus-life
        - Content: app-gen-09
            - Responsive Content: app-gen-rsp-02
    - Example Postcard
        - Source: carnegie-slate
        - Medium: postcard
        - Campaign: senior-search
        - Term: apply
        - Content: senior-search-pc-01
    - Example Parent

        - Source: carnegie-slate
        - Medium: email
        - Campaign: relation-yield (relation-app-gen, relation-anti-melt, etc)
        - Term: financial-aid
        - Content: relation-yield-01
    - Example Landing Page
        - Source: carnegie-slate
        - Medium: portal
        - Campaign: campaign name
        - Term: CTA which was clicked in the portal (apply, visit, etc.)
        - *Content: not needed here*
    - Example Admitted Student Research (ASR)
        - Source: carnegie-slate
        - Medium: email
        - Campaign: asr
        - Term: asr-survey
        - Content: asr-01
    - Note all UTMs for a partner's print pieces in the UTM Code Builder!
- Slate
    - Deliver
        - Emails
            - Number + Campaign
                - *#03 Junior Search*
                - No need to include any terms
            - Openers: Number + Campaign + (Opener)
                - *#03 Junior Search*
                - *#04 Junior Search (Opener)*
                - Openers should be their own number and count in the total number of emails in the campaign
            - Dart/Motivator: Number + Campaign + (Dart/Motivator)
                - *#04 Junior Search (Dart)*
            - Responsives: Responsive + Number + Population
                - *Responsive #07 Senior/Underclassmen*
                - If going to more than one population, use the name of the population where applicable
                - Bank of responsives in total, responsive folder separate, request that AMs have the responsive named in task
                - Keep these emails in a separate folder
            - Parent: Relation + Population + Number
                - *Relation Yield #02*
                - House relation emails in a separate parent folder, and create a separate parent report, separated out by funnel stage. This

report will likely need to be manually updated with email sends to separate out into those funnel stage sections, but by excluding from the student reports, you won't need to ever manually update those per email send

        - [Example of report with relation part]()

    - Templates: Campaign Year + "Carnegie" + Campaign + "Template" + Number
        - *22-23 Carnegie Senior Search Template #01*

- Texts
    - Number + Campaign + Text
        - *#01 App Gen Text*
        - House in the App Gen folder and filter out SMS messages in the report
- Slate Voice
    - Number + Campaign + Slate Voice
        - *#01 App Gen Slate Voice*
        - House in the App Gen folder and filter out Slate Voice messages in the report
- Slate Print Mailers
    - Number + Campaign + Postcard/Mailer
        - #01 Senior Search Postcard
        - If needed:
            - Add on the topic (#02 Junior Search Mailer - Visit)
            - Add on the size (#01 App Gen Postcard 6x9)
    - When loading new versions, archive old versions and upload new version with the same name
- Folders
    - Carnegie as the top folder
    - Subfolders named by campaign (no terms included)
        - Deliver Campaign Subfolder Names

- Rules
    - Set + Carnegie + Campaign Name + Population + APPROVED/IN PROGRESS (when approved, remove when launched)
    - *Set Carnegie Senior Search Population - APPROVED*
- Populations
    - Carnegie + Campaign Name + Population
    - *Carnegie Transfer Application Generation Population*
- Reports
    - Carnegie + Campaign/Report Name (Performance vs. Metrics) + Term
        - *Carnegie | RMC | Senior Campaign Metrics 2022-23*
        - *Carnegie | Neumann | Sophomore/Junior Search Campaign Performance 2022-23*

            - ***Only add name of school if exporting report to email***
        - Folders
            - *Carnegie → Communications*
            - *Archive old reports!!*
    - Forms
        - We should be using this naming convention as the **internal form title only**.
        - Carnegie | Campaign + Form Type + Cycle
        - Carnegie | App Gen YNM - 23-24

- Proofs
    - Client + Email Name + Mobile/Desktop
        - *Store these on your desktop/downloads as you'd like, or delete as you go*
        - ***Copy name of the email and add mobile***
            - *Client #07 Yield*
            - *Client #07 Yield (Dart)*
            - *Client #07 Yield_mobile*
            - *Client #04 Junior Search (Opener)*
            - *Client #04 Junior Search (Opener)_mobile*

Population & Rule Configuration (Back to Table of Contents)

- Build in Configurable Joins as long as the partner is comfortable with it. Technolutions has stated that eventually local bases will deprecate; although there is no current timeline for this. Ultimately, the client will need to be the final approver on the population rule. Feel free to build in local if the client is not comfortable with CJ.
- Populations: Groupings of records (determined by a rule) that can be pulled for communication (or other) purposes.
    - Creating a Population
        - Go to Database
        - Go to Populations
        - Click Insert
            - Add Name, Scope, and Folder of Population
                - As a note, the scope of the population will need to match the scope of the rule that is driving the population.
            - Naming Conventions listed in above section
    - Creating a Population Rule
        - Go to Database
        - Go to Rules
        - Click New Rule

        - Enter Name (with *in progress)
        - Appropriate Base (to match that of the Population)
        - Type (Person Population or Application Population)
          Recommended type by campaign below:
            - Search - Person
            - App Gen - Person
            - Incomplete App - App
            - Yield - App
            - Anti-Melt - App
            - Population specific - varies on population
        - Select/Create Folder
        - Enter Exclusivity Group, if necessary
            - *Note: Students can/will be in multiple populations, so communications populations do not often have exclusivity groups.*
        - Set to Preview Status
    - Recommended Recipient List Filters:
        - Important filters for all rules
            - Email address exists
            - Not deceased
            - Not in test record/opt-out tag
        - Search + App Gen Campaigns
            - Person Status
            - Student Type and/or Level
            - Term
        - Yield
            - Application Round
            - Term (sometimes included in the round)
            - Student Type (sometimes included in the round)
            - Most recent decision - Admitted
        - Anti-Melt
            - Application Round
            - Term (sometimes included in the round)
            - Student Type (sometimes included in the round)
            - Most recent decision - Deposited
    - Post to the partner for review and approval
    - Once approved, add the "approved" language to the name of the population rule. This aids in knowing at a glance that the population is approved ready for use.
- When the campaign is ready, turn to active and retroactively refresh the Population Rule. Check that the Population associated with that rule moves

up to the same count of students shown in your rule after the rules have had a chance to run.

- Retroactive Refresh is accomplished by selecting "New Query" from within the rule being created. The New Query will contain identical filters to the rule. Add an export such as Ref ID, and run query. Once the query has run, a drop down option will appear with an output option of Retroactive Refresh. Select this option and export. The records within the query will now be refreshed and run through the rules. It may take some time for the records to completely run through the rules and add the new population to the record.
- *Note: Once a population is active/running, students start at Day 0.*

- Helpful Resources
  - Slate Knowledge Base article
  - Campaign Refresh Knowledge Base Article
  - Campaign Refresh Template

Name Buy Load Process (Back to Table of Contents)

Slate Communications Strategists will continue to be responsible for Name Buy Loads until informed otherwise. - Presently, the Slate Search Specialist is being trained on all aspects of this process. Once they are fully onboarded, this responsibility will shift to the Slate Search Team.

- Source Formats
  - Learn more about Source Formats here: *Source Format Library and Creating a New Custom Source Format*
  - Contract Language
    - For search campaigns (both senior and underclassmen), we are contracted to create up to two (three if there are Darts/Motivators) source formats
      - A partner may ask us to use their already existing source format. Our preference is to keep their process in tact as much as possible if it already exists for ease in reporting year over year
- Naming Conventions
  - Source Formats
    - Use already existing source formats if possible, from the Source Format Library
    - Use generic names (Student Search Service (aka CollegeBoard), Encoura)
    - Avoid using ACT and SAT

            - No need to notate Carnegie here, rely on your interaction codes to pull our purchased names
        - Source Folders
            - Use already existing folder structure if possible
            - Use generic names (College Board, Encoura)
            - Avoid using ACT and SAT
            - No need to notate Carnegie here, rely on your interaction codes to pull our purchased names
        - Namebuy Files
            - Client Name + Term + Market/Segment + Month & Year
            - Example: *Millsaps F24 Tertiary High Ability Apr 22*
        - Interaction Code
            - Code Name: *Carnegie*
            - Subcode: *College Board, Encoura, etc*
        - Custom Field
            - Field: Carnegie Market
                - Prompts: Primary, Secondary, Tertiary, etc.
            - Field: Carnegie Segment
                - Prompts: High Academic Ability, General Academic Ability, Opt In, Interest in My College, Advanced Placement
    - Process
        - The Slate Strategists discusses Source Formats during the Discovery Visit
            - See Discovery Visit section for a list of questions!
                - Address any current source formats or processes
                - Recommend to consolidate records as quickly as possible after name loading
                - Discuss custom field/prompt list: Carnegie Search Segment and Carnegie interaction code
            - Name Buy consultant discusses process & strategy
                - Establish that we will break out files into primary, secondary, and tertiary, as a standard markets
                - Other segmentation will include General Ability, High Ability and Opt In
        - Name Buy Reports (for name buy consultant)
            - Academic Segmentation
                - Briefcase in, all we need to update are the header rows
                - Just update Primary section (top)
                - If you have info about how they collect GPA, help set up the GPA section. Recalculated? Real number? How is the field set up?
                    - Sydney added to the DV doc
            - Geographic Segmentation

            - Delete the literal, add state and county, rank descending (Jim made this edit)
        - [Income Segmentation]
            - Pulling from ACS zip code median income data
            - Just need to update the top row
        - [Inquiry Geographic Funnel] (future terms)
            - Update top section to add person scoped term and type
            - Do state and county dropdown
        - Mark reports IN PROGRESS
        - Moving forward - new clients, SS and SSA teams to build these reports out
        - Once these are built, make sure the clients know about these reports
        - SS change status to "Uploaded" in our Slate instance once names are loaded (in Enrollment Strategy tab)
    - File Naming
        - Client Name Term Market/Segment Month Year
        - Millsaps F24 Tertiary High Ability Apr 22
    - The SS builds the Source Formats using the initial namebuy file as a guide, but leaves remap inactive
        - Naming conventions - College Board, Encoura, etc. (exclude Carnegie naming)
        - Use the client's past load mappings as a starting point for the field mappings if creating a new format
        - At minimum, we need name, birthday, and email mapped, but other common fields to be mapped are:
            - Address
            - Major
            - Sex
            - Ethnicity/Race
            - Entry Term
            - CEEB code
            - Order Number - Custom field/prompt list: Carnegie Search Segment
                - Map the value of the order number to the segment prompt value that is in the title of the list
        - Refresh Values on the Prompt Value Mappings view and map the values to Slate prompts as needed
        - Add any additional static mappings. Common static mappings may include Student Type, Address Type, Interaction (Carnegie), etc.
            - Interaction code
                - Code Name: *Carnegie*
                - Subcode: *College Board, Encoura*

            - If needed, build out custom fields/prompt lists
                - Confirm with Jim/consultant that this segmentation approach will be used
                - Field: Carnegie Market
                    - Prompts: Primary, Secondary, Tertiary, etc.
                - Field: Carnegie Segment
                    - Prompts: High Academic Ability, General Academic Ability, Opt In, Interest in My College, Advanced Placement
                - Get these approved by the client before building and mapping in Slate
        - **The SS posts the Source Format to the client for review and approval; asks any specific questions about custom field mapping, static mappings, etc.**
        - Upon approval, the SS loads the first namebuy file and ensures for accurate mapping and that the names fall into the correct populations
    - Source File Types & Tips
        - College Board (SAT)(titled "Student Search Service" in the Source Format Library)
            - This file comes in as a text format so leading zeros in the number-based fields will not be lost
            - The name buy consultant will download the txt files, load it to files.com in the client's folder, sub folder "RMSC", second subfolder "Search Name Buy", and will notify the Slate Strategy via Asana when the names have been added.
            - IMC (Interest in My College) names are in the same format as other College Board names, so they can be loaded using the College Board source format
                - The INTEREST_ME field will distinguish these names and should be mapped to Person Status (Y=Inquiry)
                - Map to Carnegie Search Segment field – Add IMC prompt if needed
                - Load them to a separate IMC folder for origin sourcing
            - Most partners will request that the Major 1 field is mapped; you'll need to use this CIP Code resource to map these values to the appropriate prompts. The name buy strategist should be able to provide you with the CIP Code resource if needed.
        - Encoura/NRCCUA (ACT)
            - This file will come in a CSV format and if opened at any point between downloading from the secure site and loading into Slate, it'll lose leading zeros.

                - The name buy consultant will download the csv files, load it to files.com in the client's folder, sub folder "RMSC", second subfolder "Search Name Buy", and will notify the Slate Strategy via Asana when the names have been added.
                - Check the file to make sure the leading zeros are present:
                    - This will affect birthdate, zip code (including 4 digit), and CEEB code
                    - You can select the column in excel and Format Cells to add the leading 0 back (select Custom, '0', and type in the appropriate number of 0s)
    - Origin Sources
        - Origin Source Best Practices
            - *Carnegie | Slate Origin Source Best Practices*
            - RECORDING - overview of how origin sources work and how to report on them
            - Training Video - training by the one and only Nick Porcella
        - When we are loading names or creating new folder structures in Upload Dataset, we will need to check to see if any new Origin Sources need to be added.
            - This process will vary from partner to partner, but the Slate Strategist may need to build a new origin source, load namebuy files into an existing folder the partner has been using for name loads, or maybe even nothing if the school doesn't really utilize origin sources well
            - Naming convention - College Board Search, College Board IMC, Encoura (exclude Carnegie from any naming)
    - Ongoing Uploads
        - The namebuy consultant will coordinate with the client on subsequent name purchases; once purchased, the Slate Strategist will be sent the file or grab it from the secure site
        - Inactivate the Source Format remap and upload file(s)
        - Refresh values on the Prompt Value Mappings page and map any new values that need matched to Slate prompts
        - If any new values are mapped, post to the partner for approval before reactivating the Source Format.

Deliver Emails (Back to Table of Contents)

Jump to:

Email Template Import · Deliver Builds · Email on Acid Proofing

[Proof Posting & Approvals](#) [Daily Monitoring](#)

- **Email Template Import**
  - Download template file from task in Asana.
  - Open the instance of the school you're building the template for and go to deliver.
    - Click 'New Mailing'
      - Name: Campaign Year + "Carnegie" + Campaign + "Template" + Number
        - *23-24 Carnegie Senior Search Template #01*
      - Folder: Templates (Don't put a subfolder, otherwise you won't be able to pull in it from a mailing.)
      - Click 'Save'
  - Double click file to open folder, click 'Extract All', another window will pop up, click 'Extract'
  - Another folder will open, from here, click the internet link, "Index", in the Folder to open up the template and template's code.
    - Once the template is open in an internet browser, click 'Ctrl + U' to open the code. Then 'Crtl + A' to select all the coding, then copy the coding.
    - In your Slate mailing, click 'Edit Message' and then 'Source'. Click 'Crtl + V' to copy the code into Slate.
    - Click 'Ok', add 'Test' to subject line of the message, click 'Save'
  - Move images from the new folder to your desktop. You'll need to upload these to the Slate Library. Once your template has been created, feel free to delete these images from your computer.
    - In Deliver, on the right side, click 'Library'
    - Click 'Carnegie' subfolder. Create a new subfolder if needed by right clicking on the folder name.
    - Once in the correct subfolder, click 'Upload' at the top of the page. Select the folder and images you want to upload for the template.
    - After uploading, 'Duplicate' the tab and open up your mailing.
  - Back in the mailing, 'Edit Message' and open the source code - now the images will be added to the template.
    - In the source code, click 'Ctrl + f' and type image. This will highlight anywhere in the source code that has an image file.

```
<tbody>
 <tr style="border-collapse:collapse">
  <td align="center" style="padding:0;Margin:0;padding-bottom:5px;padding-top:30px;font-size:0px"><a
href="https://www.neumann.edu/life/residence_life/default.asp?hsLang=en" style="-webkit-text-size-adjust:none;-ms-text-size-adjust:none;mso-line-height-rule:exactly;text-decoration:underline;color:#47598B;font-size:14px" target="_blank"><img alt="Neumann University residence hall" class="adapt-img" height="219"
src="images/living_and_learning.png" style="display:block;border:0;outline:none;text-decoration:none;-ms-interpolation-mode:bicubic" title="Neumann University residence hall"
width="183" /></a></td>
 </tr>
```

    - Click back to your 'Library' tab and click on one of the images you uploaded for the template. A new window will open with the image.
        - Highlight the URL through the backslash of the name of the file. Example: https://admissions.sbc.edu/www/images/Underscore/Junior%20App%20Gen%20Template%202/facebook-4.png → https://admissions.sbc.edu/www/images/Underscore/Junior%20App%20Gen%20Template%202/facebook-4.png
    - Copy that part of the URL and click back to your mailing source code.
        - Highlight the URL up to the backslash before the name of the file.

        - Paste the Slate Library URL into the highlighted area within the code.
            - Continue to do this for all the images. This is telling Slate, this image lives in this file structure and where to pull the image from.
        - Click 'OK' - Images should populate within the Template!
            - To add image descriptions, click on the picture in the message and add to 'Alternative Text'.
- Check the links of the template
    - Header image should be linked to the school's main webpage
    - Double check that any logos are linked to main webpage
    - Social media icons should be linked to the correct social media, double check image descriptions, sometimes Facebook and Instagram get mixed up.
- Click "Save" and switch to mobile view to see if everything is responding ok. Make any adjustments to code as necessary.
- Once you're happy with the template, run it through Email on Acid to test mobile responsiveness.
    - Use this mailing as a guide to make accessibility updates: https://partner.carnegiehighered.com/manage/deliver/mailing?id=3ad2a620-f3b2-44e1-9004-040e54ca0acc
    - Within Email on Acid, you are able to use either 'Email & Spam Testing' or 'Campaign Precheck' to review how each template looks.

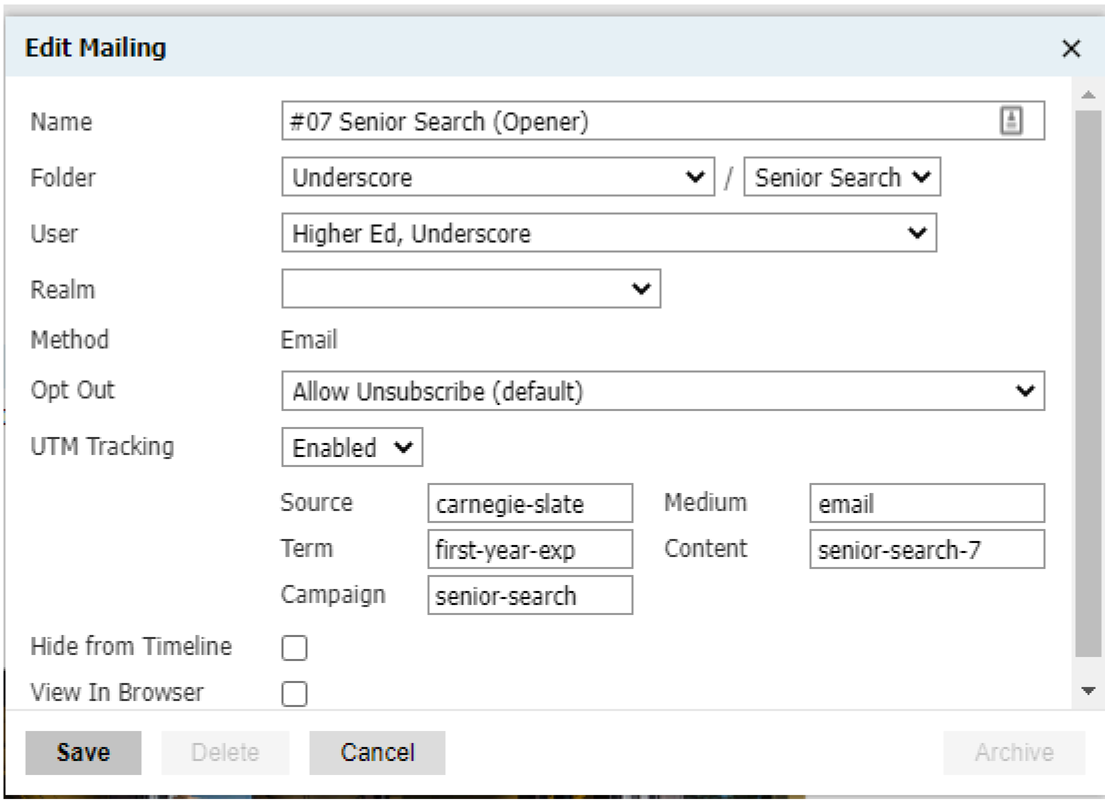
However, 'Campaign Precheck' is especially useful in double-checking accessibility.

- Standard for all clients, each template build should include three templates. Within these templates, clients will receive 2 additional header images per campaign to allow for more customization between mailings. Repeat these steps as needed for each template build.
- After all templates have been created, share with your clients how to access and edit the templates on a call.
    - Emphasize to clients not to edit our templates – instead, copy and edit
    - Show the source view and how to edit links, text, tables, etc in the code
    - How to delete sections of code after copying
    - See template training documentation. Please note, this documentation is for clients that have template only projects with us, so do not distribute. But feel free to draw from this document when walking through the templates with the client.

Tips and Tricks of Uploading templates:

- Slate is picky about see-through backgrounds on images and will often change it to be opaque. You can use another image that may be similar that is already in the instance, or work with Creative to get the same image with a solid background.
- Make sure everything (buttons, headers, etc) is linked when you make it, otherwise you'll spend too much time linking things as you build an email using said template.
- Occasionally the social media icons will shift to the left. You can center them in the source code by making sure <td align="center" instead of align=left or right.
- Designers will have photos resized and shared so we don't have low quality ones from Word docs. However, if you are still having trouble with the quality of a photo, zooming in and taking a screenshot of the picture can help provide a better image.
- Any template that includes a button should be using a variable button, not static images. If you receive a template using static images in place of a variable button, reach out to Creative. Additionally, the creative team will avoid placing buttons four in a row.

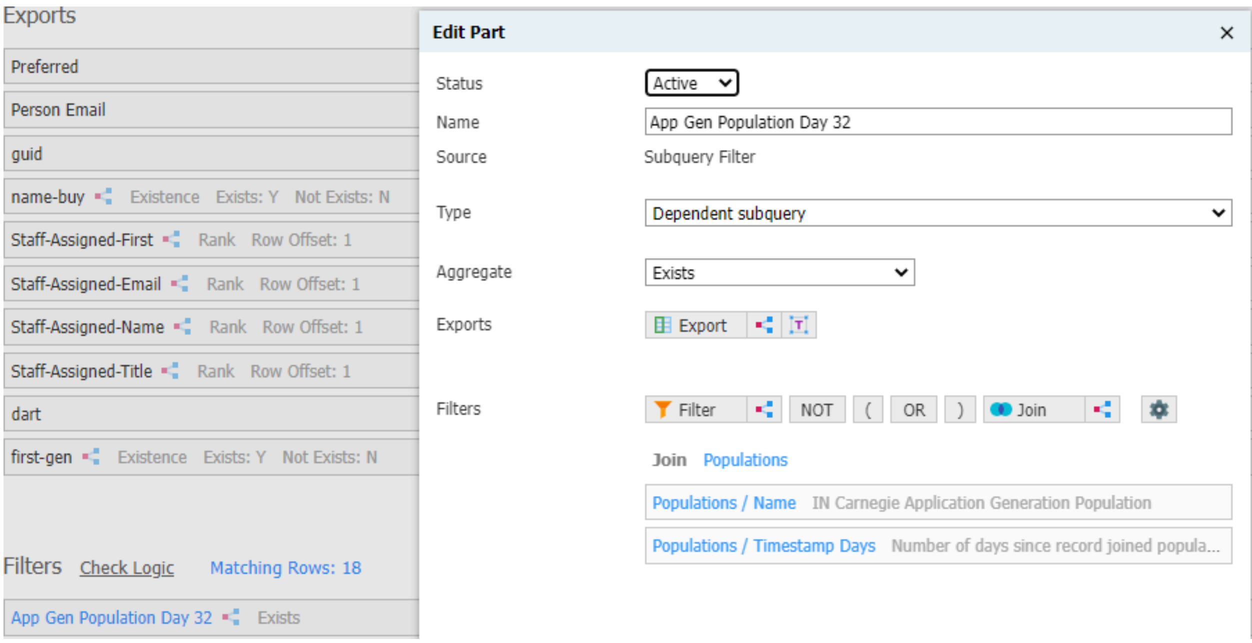
- **Deliver Builds**
    - Emails
        - Click on New Mailing (or copy mailing after building the first one in a campaign) and name the email appropriately, folder, and enable UTM tracking and enter your UTM parameters. [Look here for the UTM terms](#) which are typically used > Carnegie | Communications - UTM Code Builder
        - Make sure that you have the appropriate 'Opt Out' option selected to ensure that there is an unsubscribe option within the mailing.

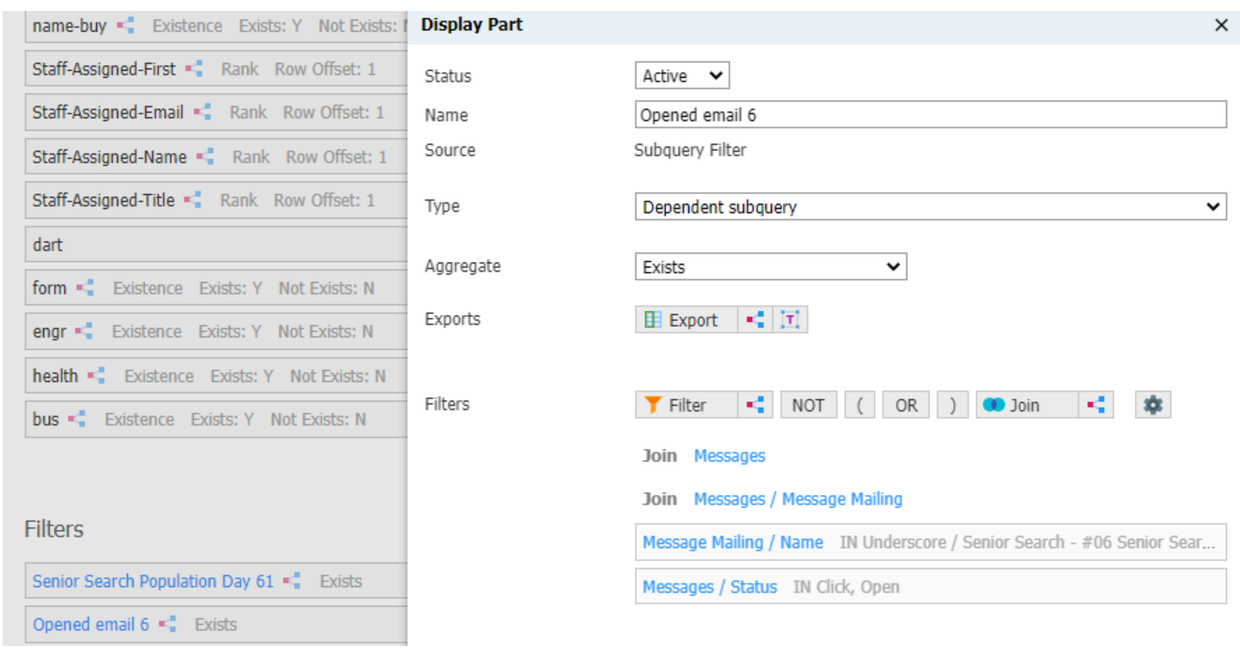


        - Add your desired template and begin pasting in the text from the copy document. ***Use Ctrl + Shift + V to keep the font formatting displayed in the template.***
        - Add any alt text, links, and styling needed and test.
        - Create a recipient list using the Configurable Joins Person or Application base depending on the campaign and the population/rule that is being referenced. For a parent email you will use the CJ Relation base. Add a subquery filter and join to populations. Filter on your population name and timestamp days.
            - If your email is an opener, create another subquery filter joining to messages and message mailing. Filter on the prior message mailing name and messages status. If you are

starting in the Application base, you will need to first join to the Person table.

- Add a message status of Open and Click. Depending on the preference of the client, consider sending to either:
  - Students who have opened or clicked into any mailing within the campaign
  - Students who have opened or clicked into the previous message



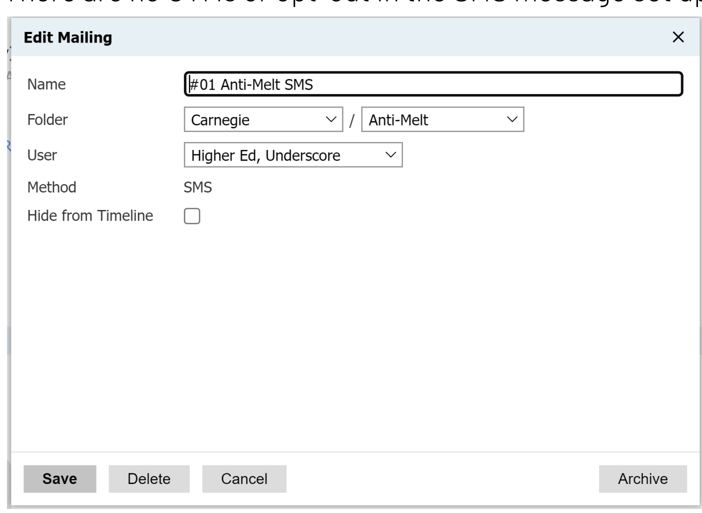


- Segmentation

        - If you are unsure what a segmentation might mean in your copy, check your comm plan first for more information.
        - Depending on the segmentation and how the instance is set up, it might be more appropriate to use content blocks or existence exports/elseif statements with liquid markup.
        - Liquid Markup/conditional logic should be added to the HTML source code to ensure proper formatting and is a must when adding to bullet point items.
        - If the copy indicates segmentation within the subject or preheader lines, consider utilizing either content blocks or translation codes.
            - Translation codes are useful if you are only using plain text within the subject/preheader. If merge fields are required, consider using content blocks instead. Translation codes will not pull in merge fields.

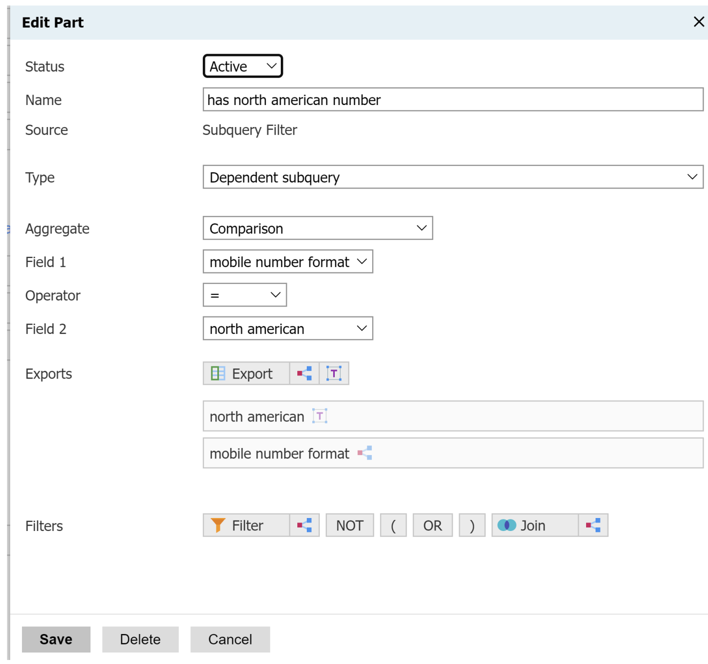
    - Responsives
        - Responsives are not sent on a timestamp day, so you will just send it to the population. They are sent as one-time emails.
        - Be aware of any recipients that should be excluded here. For example, an application generation responsive about financial aid might need to exclude international students.

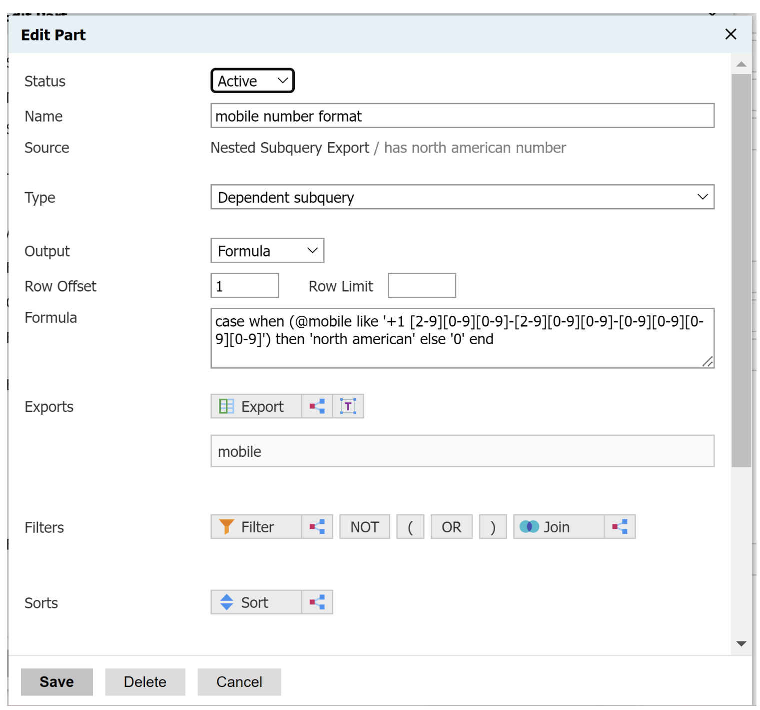
- SMS/Text Messages
    - Click on New Mailing (or copy mailing after building the first one in a campaign) and name the SMS appropriately and folder in the campaign folder.
    - There are no UTMs or opt-out in the SMS message set up.



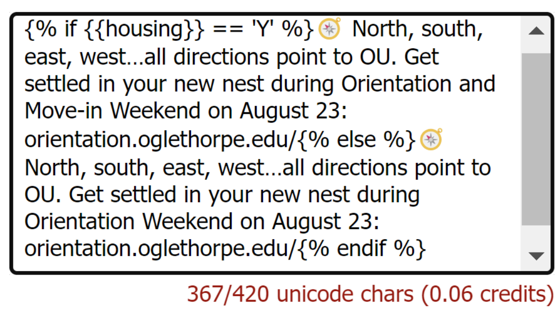
    - When creating the recipient list, it is best to start from the population rule and create a new query.

- Remove the “email exists” filter (if applicable) and add a “mobile exists” filter to the query to save Slate time and credits trying to text numbers that do not exist.
- If the institution is collecting opt-in information, be sure to include this in your filters.
- For partners who want to exclude international students and avoid extra credit charges, add the following “has north american format” filter





- Copy and paste the copy into the WYSIWYG editor for the SMS message. You may want to type the message out as opposed to copy and pasting if it seems to be adding too many characters.
    - Note: emojis add an extra credit charge to an SMS message
    - You can include merge fields in the message.
        - Slate will show a charge based on the character amount in the WYSIWYG editor, however, Slate will only charge credits based on the actual number of characters sent.
            - For example: {{Person-Preferred}} in the message body will not cost more than "Eli" if those characters sent it over the 160 character count in the WYSIWYG
    - Links can be included in a SMS, however, the GUID should not be appended.
    - Liquid Mark-up can be utilized, but is best if it is only an existence filter to avoid additional computation and processing time for Slate.
        - In this example, you can see the liquid mark-up is causing Slate to calculate .06 credits per message, however, when it sends, it is actually only charging .03 credits per message as it is only sending one of the two copy options.



- Screenshot the proof of the SMS from the mailing's Deliver page or send yourself a test message to create a proof for your partner institution.
- Depending on the partner's preference, when you post the proof, you can also include the estimated Slate credit cost if it is a one-time send.
    - If sending on a drip, let the partner know that the Slate credit charges will be ongoing and that they need to keep their active balance ready to accommodate the daily sends.

- **Email on Acid Proofing/Testing**
  - Open and login to Email on Acid from LastPass
    - Retrieve the code from your email to complete the log-in process
  - **Initial Set-Up** (only needs to be done once):
    - In the top right hand corner, click the arrow next to your name. Then click on “Email Testing”.
    - You’ll need to create a preview that we can share with clients. To do this, click the “+” next to the “Email Client Testing Profiles" drop down.
    - Name the profile “Carnegie Proofs” with the Name Abbreviation as “proofs”, Set as Default Profile, and click “Add”.
    - Select only the following previews to be in this profile:
      - Gmail App Pixel 6
      - Gmail App Pixel 7
      - iPhone 14
      - iPhone 14 - dark mode
      - iPhone 15
      - iPhone 15 - dark mode
      - Gmail Chrome (Windows 10)
      - Gmail Chrome (Windows 10 - dark mode)
    - Click Save
    - NOTE: If you have a client that wants to see a specific preview that is not in our list, such as Outlook, then follow the “Initial Step” again and create a profile specific for them that includes the preview they wish to see.
      - We don’t inherently include Outlook in our previews because Outlook is quite problematic with formatting and such a small percentage of people open emails via this email provider. When looking at data from our clients, we found that only 0.05% of emails were opened via Outlook so instead we recommend making sure formatting looks good on the providers most frequently used.
  - **To provide proofs:** Click the “Email & Spam Testing” envelope icon on the left hand side.
  - Select “Email Only”
  - Open the source code of your message in Slate. Copy the entire source code, and paste in the box that says “Copy and Paste your HTML”. Click Next.
  - The “Carnegie Proofs” profile should automatically show in the drop down (assuming you did the initial set up listed earlier) or select the one appropriate for your client if they requested something different. Click Next.

- Copy the subject of your message from Slate and paste in "Subject Line"/ "Email Subject"
- Click "Run Email Test"
- Make sure that everything is formatted correctly. If it isn't, make necessary changes and rerun the email source code.
    - Check multiple versions of the renderings in EOA to confirm correct formatting across platforms.
- Assuming everything looks good, click the share icon next to the "Create New" button on the top right.
- Make sure sharing is enabled and copy the link to share with your client for review.
- To proof a darted or motivatored email, send an email test to yourself, open you gmail inbox, it and click "print", exit the "print settings" option, and then uses a screenshot app to capture the entire email. See SHIP section for further instructions.

- **Proof Posting/Approval**
    - Asana
        - Click your client project, then click the correct campaign for the proofs to be built. Ex: Building sophomore search emails, click on Sophomore Search Campaign Proofs
        - Click 'Add Subtask', add name of subtask, then click the subtask notes and comments (the Cartoon speaking bubble). If possible, name the subtask and post in batches (eg. Yield Proofs Emails #01-#03)
            - Assignee = the main client contact who will approve the proofs
            - Due Date = Typically 1-2 weeks from the posting date. Leave time for potential edits between the due date and scheduled send date
        - In your comment box, write the proof you have for them, you welcome any feedback, and ask for written approval. Point out if the anticipated send date is soon.
            - If there is extensive conditional logic, you may want to explain which audience sees which information in the proof.
        - Attach the proofs by clicking the paperclip icon. Upload proofs from wherever you saved them.
        - If it is preferred by the client, provide links directly to the mailings in Slate.
        - Add collaborators to be notified of this task. This should include your AM/PM team, your Slate Strategist/SSA, and anyone on the Client

Team that they feel should be included. Add them by clicking '+' under your comment box. Use the search bar to find and select the appropriate people.

- Click back into your comment box. Once collaborators are added, your files have been uploaded, and you're happy with your message to your client, click "Comment".
- You just created the task for the Client to review, and you can mark your "build proofs" internal task as complete.
- Any replies to the proofs in Asana will go to whoever posted the proofs. If you post them, you will receive any edits/approval from the client.
- Monitor post for approvals.
    - It is the responsibility of the SS/SSA to monitor for approvals and make edits as requested until email is fully approved.
    - AM/PM teams should be notified of any major copy edits/changes as they may need to go to creative or if the client is requesting image changes.
    - Once the email is approved, you can add the blue "Approved" tag to the send task on the internal Asana board.

- **Daily Monitoring**
    - If there is an SSA on the account, this would be their responsibility. If there is no SSA, this would be SS responsibility.
    - Look over your task list each morning and get an idea of what the day will look like.
    - Check that previously scheduled emails sent.
        - See tasks that have "approved" and "scheduled" tags.
        - Login to instance, select correct Deliver message.
            - Check that the email is running for drip campaign emails, or completed for responsive emails.
                - Double check the number of students the message was sent to and make sure it's accurate for your population.
                - Check to see if there's a higher than normal bounce/skip rate.
            - If things look normal, add a "sent" tag in Asana, then mark the task as completed.
            - If the email didn't send, please notify your internal team (AM/PM/SS/SSA), update the timestamp filter and reschedule for the agreed upon date.

            - Common reasons it may not send include missing the correct send window, recipient lists timing out, Slate being Slate
        - Schedule Emails/texts for the Day
            - Look for email sends that have been tagged as 'approved' for the day and schedule those for the school's preferred send window or consult the when to send report for times which perform well for that campaign.
            - Click on task to double check there aren't any last minute edits, or to see the population that the email should go to.
            - In Slate, edit the timestamp date and schedule.
            - Once scheduled, add 'scheduled' tag in Asana

Email Build/Proof Checklist (Back to Table of Contents)

- [ ] Update UTMs
- [ ] Update email title
- [ ] Update subject line
- [ ] Update sender name if needed
- [ ] Update header image if using template
- [ ] Check all links
- [ ] Check mobile responsiveness (table stacking, etc.)
- [ ] Update/check alt text
- [ ] Check that merge fields are populating as expected
- [ ] Test conditional logic
- [ ] Test content blocks or translation codes if necessary
- [ ] Check that the Opt Out group is broad: Default, General, etc.
- [ ] Check query filters are accurate and have correct population & timestamp (if applicable)

Proofing

- If SSA is on an account
    - After onboarding is complete and the SSA is comfortable with the process, they will be assigned all proof tasks for the client.
    - Once the proof task is received from the AM/PM, the SSA will build out the emails in Slate
        - Note: it is important to be aware of the send schedule and whether there are mailings that are more urgent that need to be prioritized. Work with your Strategist and AM/PM if there are questions here.
    - While an SSA is in Stage One (Slate Communications Strategist Roles KPIs), the SSA will create emails in Slate and assign the proof task to their Strategist and comment to let them know that the emails are ready for review. If you are uncertain

about whether you should be passing the emails to your strategist prior to proofing, consult your strategist.
        - The SSA should be in communication with their manager about what stage they are in and what areas to be working on to get to the next stage.
    - After the SS reviews the emails in Slate, they will pass the Asana task back to the SSA to run the emails through EOA, download a mobile and desktop version, and then post to the client with Slate links (if the client prefers this). Be sure to highlight any links, liquid markup, nuances, etc. that the client should be aware of when reviewing.
    - Once the SSA has posted to the client, they can complete the Proof task in Asana.
- If proofing with Email Builder
    - Slate Strategist to assign email proofs to builder and multihome to this project board INT | Email Builder Slate Communications Proofs.
    - Email builder will build proofs in Slate instance.
    - Email builder flips task to the Strategist for review.
    - Once approved, Strategist will flip back to the builder and let them know they are ready for the EOA proofs. Builder will run emails through Email on Acid and attach mobile and desktop proofs.
        - After a SS feels good about the proofs for a particular client, they can let the email builder know they do not need to review prior to running through EOA.
    - Email builder flips task back to the Strategist. Strategist to post to client about double checking links, liquid-markup, etc.
    - Strategist completes the task
- If SS is on the account with no assistance from SSA or Email Builder
    - Once proof task is received from AM/PM, Strategist will build out emails in Slate using the copy document linked in the Asana task.
    - After building in Slate, the Strategist will run emails through Email on Acid and download a mobile and desktop version of the proof.
    - Strategist will post the proofs and Slate links (if the client prefers this) and highlight any areas of the mailing that should be reviewed (links, liquid markup, etc.).
    - Strategist completes the task.

Once approved, run proofs through EOA, and post proofs to clients. Mark task as completed.

The SHIP segmentation method for Darted and Motivatored Comms (Process + Email Build) (Back to Table of Contents)

**This method is used in the same way for both darts and motivators.*

Why use Darts/Segments:

- Enhanced Personalization: By segmenting audiences based on psychographics, into Darts, we can create personalized messages that resonate more effectively with each group of prospective students. This tailored approach is proven to increase engagement and interest. According to Forbes Magazine "About 91% of consumers are more encouraged to purchase when a brand personalizes its communication with them."

- Improved Return on Investment (ROI): Segment targeted campaigns typically yield a higher ROI compared to generic mass marketing efforts. By focusing resources on reaching the most relevant audience segments, there should be a significant increase in conversion rate and, ultimately, a better ROI for marketing budgets. It also reduces the waste of the classic 'spray and pray' models of marketing - paying for ads that inadvertently deliver the wrong messages to the wrong audiences.
- Increased Conversion Rates: Segmented campaigns allow us to better deliver the right message to the right audience at the right time. If we truly leaned into Darts strategically, there are infinite ways we can personalize messages, tell compelling stories that move the needle, or engage at opportune times that are specifically tailored to that student's interest and experiences. All of which can more compellingly guide them through the admissions process, leading to higher conversion rates.
- Maintaining Competitiveness: Our competitors and universities across the market are already leveraging targeted advertising and segmentation strategies. By advising our clients to use these practices, we ensure that we remain competitive in the higher education landscape and offer services on-par or greater-than other firms, and that our clients are playing at the same level as their competitors. In all reality, targeted advertising has been the gold standard of all advertising strategies since the early 2000's, if we aren't engaging in it, we are wildly missing the mark.
- Data-Driven Decision Making Over Time: By leveraging student Darts, we identify characteristics of the most promising student segments, learn where to best target them, and know what messages to deliver, minimizing guesswork and maximizing the impact of our efforts. Over time, we can gain data back on the effectiveness of our campaigns to each of those Darts, and use that information to improve our continuing marketing strategies going forward. This can incentivize renewals, as we should have data and insights no other competitor can access and activate.
- Aligning with Consumer Trends: Today's students expect personalized experiences from the brands they interact with, including colleges and universities. By embracing targeted advertising and segmentation, we demonstrate our commitment to meeting the evolving needs and expectations of prospective students in a competitive market.

When we use the SHIP method on darted and motivatored communications, we are segmenting by the Subject Line, Header Image, Intro Paragraph, and the P.S. Line.

Best Practices

- It is best practice to have general content segments to show to untagged names with all of these deliverables. All of your creative should have a general segment for untagged names in addition to each Dart/Motivator segment

- The Slate Strategist should lean on the DXD team's expertise when deciding which emails to dart/motivator on the Communications Plan.
    - Since all darted/motivator emails will be using the SHIP method, they should all be templated.

New contract language as of 2024: **Note: it is always a good idea to check with your Account Manager and contract to confirm what is in-scope.*

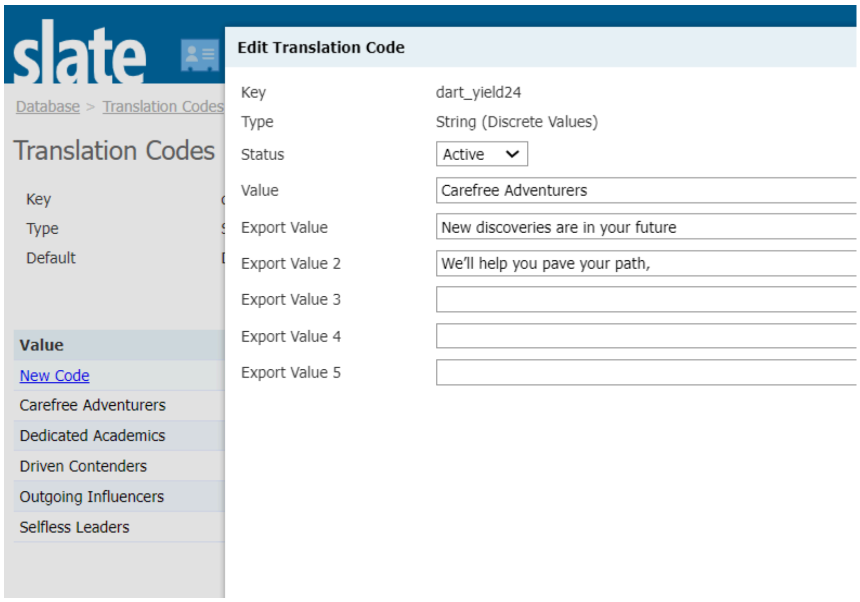
- Senior Search, App Gen, Yield, Anti-Melt: 15 emails (up to 5 emails segmented by Dart/Motivator and up to 10 additional segments as needed)
- Underclassmen Search: 20 emails for up to three subpopulations (e.g., Junior, Sophomore, Freshman, etc.)(up to 5 emails segmented by Dart/Motivator and up to 10 additional segments as needed)
- Incomplete Application – Awaiting Submission: five emails, up to two emails segmented by Dart/Motivator
- Incomplete Application – Awaiting Materials: five emails, up to two emails segmented by Dart/Motivator
- Templates – One variable template design per Dart/Motivator contract
    - *Each darted/motivator email will have a unique header image per dart/motivator + a general header image.*
- Print – One postcard (up to 6x11) via Slate Print or preferred printer segmented by Dart/Motivator per campaign to be used for any any population with which we are communicating
    - *This can include different imagery so if you are sending through Slate Print this would be separate file sends. As the strategist, we will want to determine what the client's budget is and if we would recommend only darting a portion of the text using translation codes.*
- Search Landing Pages - One branded header image segmented by Dart/Motivator, One personalized greeting segmented by Dart/Motivator

Technical Slate Build

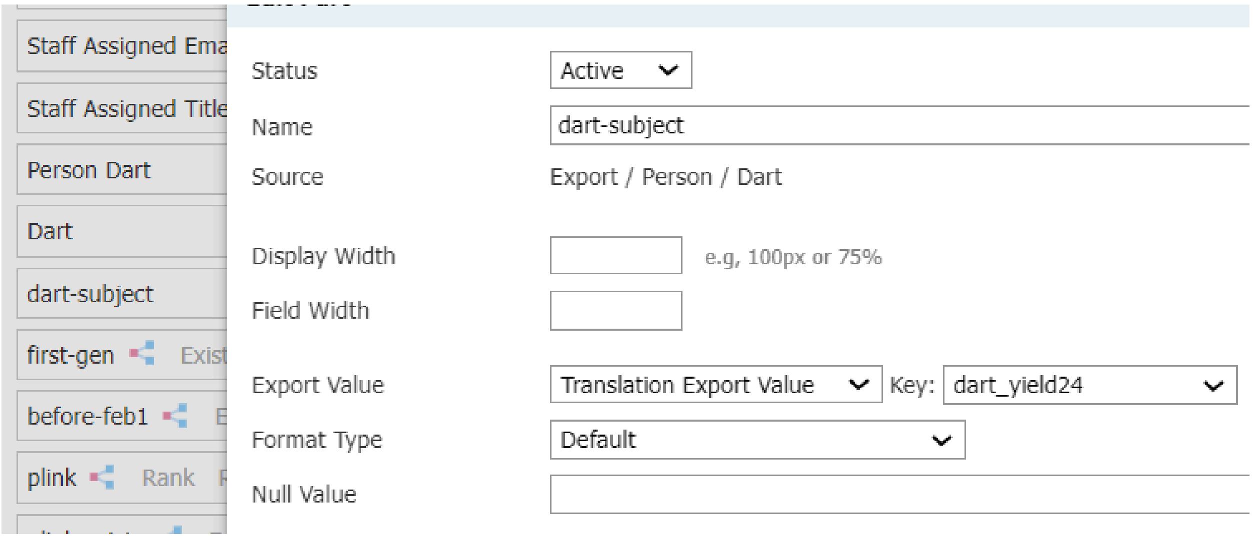
**Follow the general email build steps and naming conventions in the handbook with these additions.*

- Subject Lines
    - When darting/motivatoring subject lines, best practice is to use translation codes. This allows for quicker builds over the course of all segmented emails and does not run the risk of exceeding the character limit.
    - To create a translation code go to the Database and search Translation Codes.
    - For the first email in a campaign create a New Key. Each key can house 5 different values so you should only need one key per campaign. You can refresh these each cycle.
        - Your key name should follow the following format:
            - dart/motivator_campaign+year
            - Ex. dart_yield24

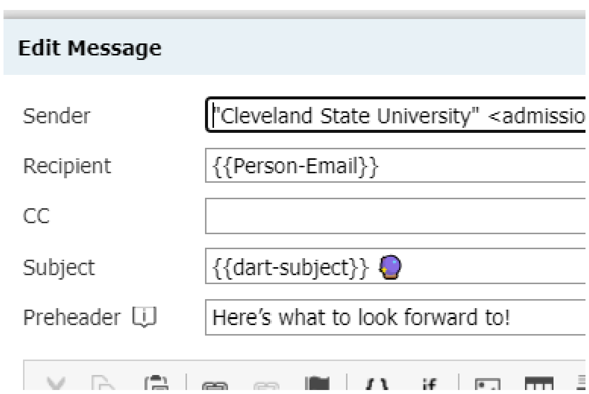
        - Type String
        - The default values will be what is sent to non-tagged students
    - Once the key is created you can create a New Code. The code value should match the dart/motivator prompt value. The export values 1-5 are for the content. You will do this for each dart/motivator.
        - The same key and export values can be refreshed/edited for the following cycle

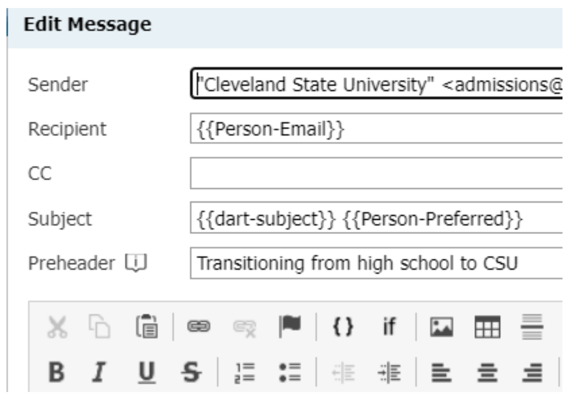


    - Merge fields and emojis in translation codes do not render. You will need to add those in the subject line as needed.
    - In your mailing query you will bring in the dart/motivator export. Give it a unique name based on the use.
        - Subject lines = dart-subject
        - Preheader lines = dart-preheader
    - Update the export value to Translation Export Value selecting the correct value for your mailing content. Set the key to your translation code key.



- In the Deliver mailing, add the export in the subject line. Here you can add your emoji or merge fields.



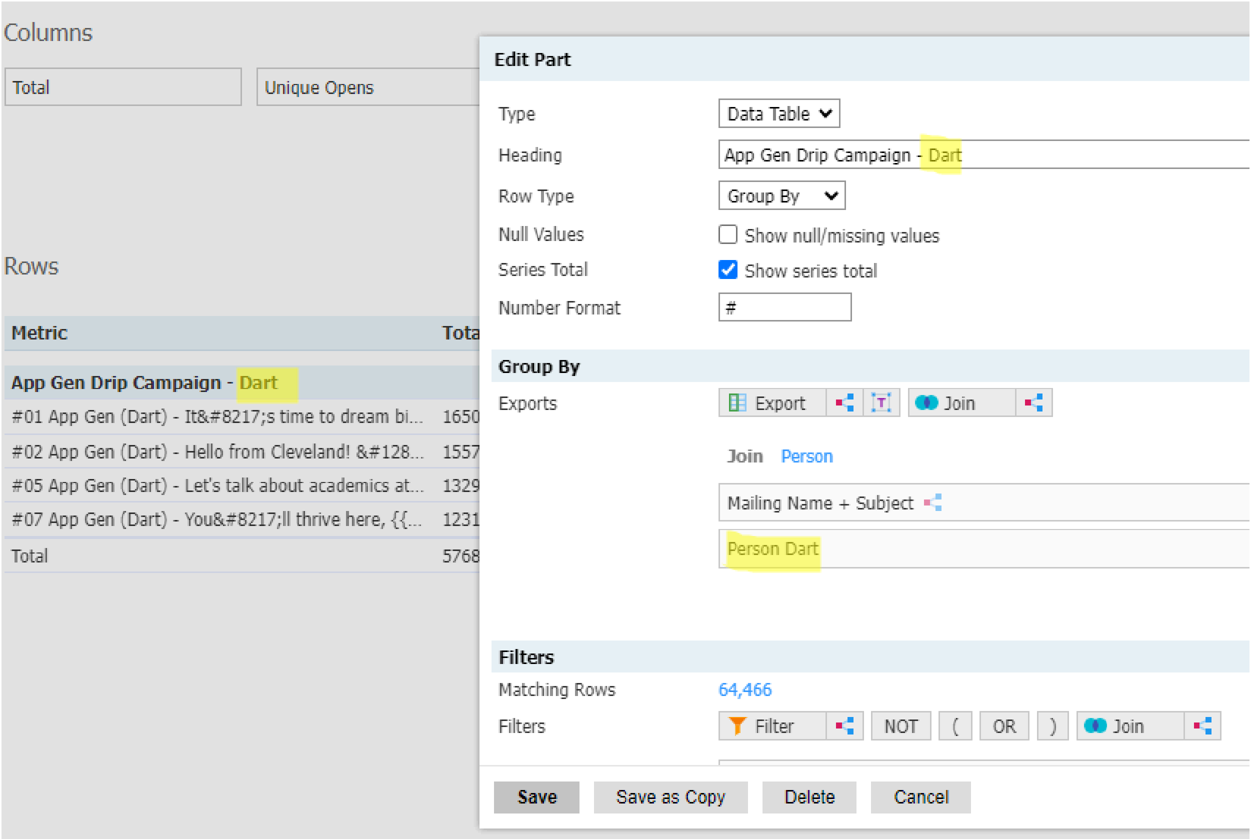


- Header Images
    - Follow the [darted template build process]() or [watch the L&L]() on the topic to build the template and configure it with your email.
    - Deliver Library Foldering
        - All header images regardless of campaigns will live in the same Deliver Library folder.
        - Carnegie main folder > cycle year subfolder
            - Example: Carnegie - (subfolder) 2024-25
            - For refreshes, you would make a new subfolder for the new cycle and add all refreshed header images from DXD with new naming conventions to that folder.
        - Header images should all be named by the Campaign + -Dart/Motivator prior to uploading to the Deliver Library.
        - Examples:
            - seniorsearch-Outgoing Influencer
            - appgen-Driven Contender
            - yield-Dedicated Academics

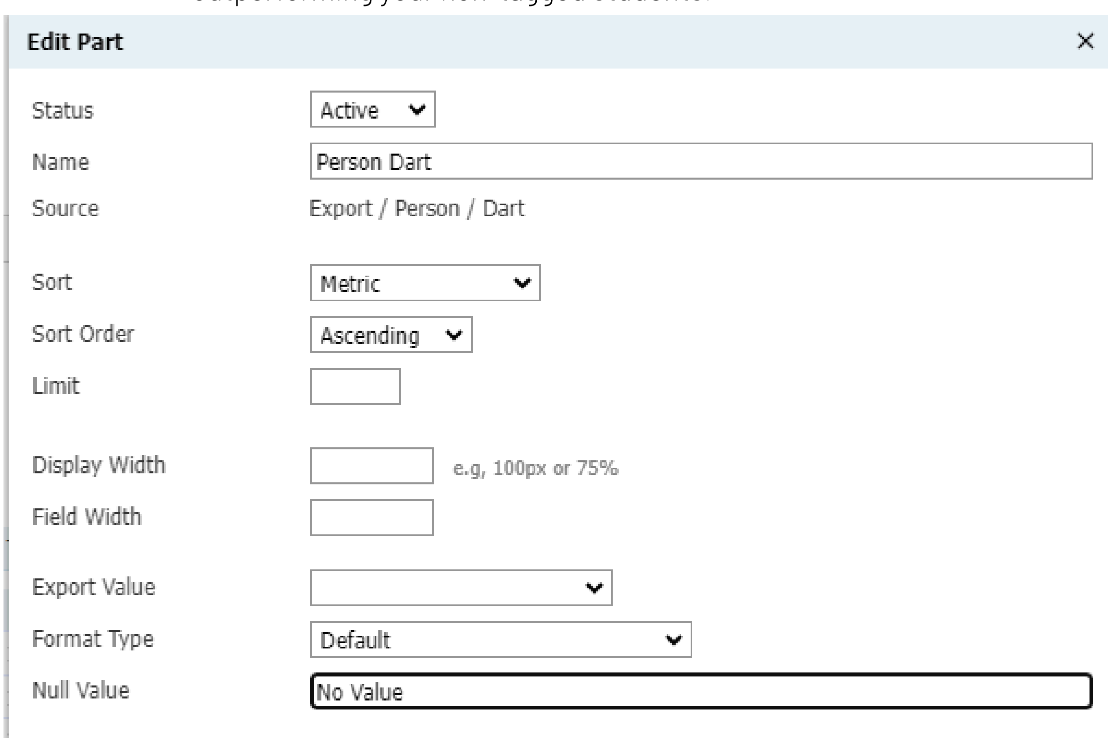
        - juniorsearch-Outdoor Adventurer
        - seniorsearch-General
    - When adding the dart to your email, the path will reflect the deliver library URL + Campaign + Email Number + {{Export}}
        - Example:
            - https://go.csuohio.edu/www/images/Underscore/Yield/yield03-{{Dart}}
            - Remember to add General to the export Null Value so the General image pulls in.
- Intro Paragraph & P.S. Line
    - For these segments you can use either liquid markup or content blocks based on your preference and email formatting.
    - Since there will be a general copy section, you will be able to use the same export for the header image, intro paragraph and P.S. Line.
- SHIP example in a client instance
    - **Note: this example is missing the general segment and header image so a dart has been assigned as a default.*
- When proofing, EOA will not render the header image, subject line or any content blocks used. Best practice is to include a snapshot of one dart/motivator view from your phone or desktop. You do not need to do this for every single one.
    - When naming this proof see proof naming conventions here.

Reporting:

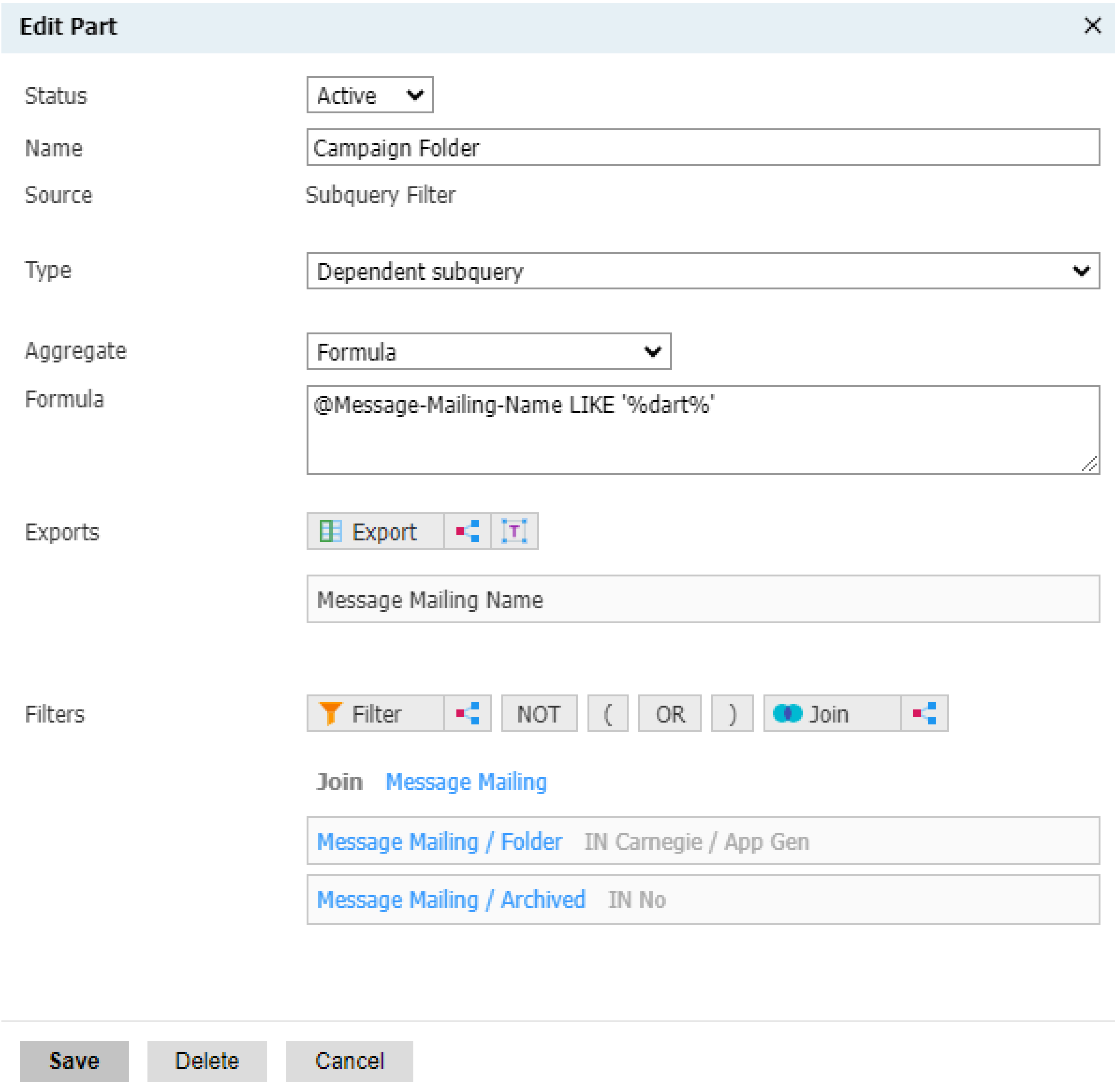
- Campaign Metrics:
    - In addition to the drip metrics section, you will want to create a section that is pulling out only the segmented emails. To do this, copy your drip metrics section. Add Dart/Motivator to the heading and add your dart/motivator field as an additional export.



- Click into the Dart/Motivator export to open it up. Add No Value to the null value. This will allow you to see how much your dart/motivator tagged students are outperforming your non-tagged students.



- Next click into the campaign folder filter.
- Change the Aggregate to Formula and add the formula @Message-Mailing-Name LIKE '%dart%' or @Message-Mailing-Name LIKE '%motivator%'



- Save

- Campaign Conversions:
  - For the conversions section, add the Dart/Motivator field as an export just as we did above and add No Value to the null value of the field. You should see something like this.

		Applications						Conversion Rates					
Metric	Inquiries	Created	Submitted	Completed	Accepted	Deposited	Net Deposits	App Creation	App Submission	App Completion	Accept Rate	Yield Rate	Melt Rate
App Gen													
2024 Campaign													
App Gen													
Carefree ...	2,060	431	425	380	348	16	16	20.9%	98.6%	89.4%	91.6%	4.6%	.0%
Dedicated...	7,896	1,576	1,556	1,452	1,361	59	59	20.0%	98.7%	93.3%	93.7%	4.3%	.0%
Driven Co...	2,558	534	528	507	485	26	26	20.9%	98.9%	96.0%	95.7%	5.4%	.0%
No Value	1,452	103	99	76	67			7.1%	96.1%	76.8%	88.2%	.0%	
Outgoing ...	813	157	156	140	130	12	12	19.3%	99.4%	89.7%	92.9%	9.2%	.0%
Selfless L...	3,346	715	702	644	572	24	24	21.4%	98.2%	91.7%	88.8%	4.2%	.0%
Total	18,125	3,516	3,466	3,199	2,963	137	137	19.4%	98.6%	92.3%	92.6%	4.6%	.0%

- Live report example

Form Configuration (Back to Table of Contents)

- All form strategy for each campaign should begin during the communication plan development process. Forms do not need to be used in the drip mailings, they can be used in ad-hoc mailings, but this should begin to be thought about from early on in the project.
- For standard scope, we will be responsible for up to one form per full campaign. Start strategizing as early as possible about what forms will be most effective for the client.
- Request for Information (RFI) Form Strategy
  - The standard RFI form recommended fields are: First Name, Preferred Name, Last Name, Email, Major, and DOB. In some cases, the partner institution may want to include more form fields. In general, the fewer the fields on an RFI, the better, as more fields will lead to higher form abandonment rates. Unbounce infographic on form optimization.
    - When collecting Preferred Name, consider including a disclaimer explaining that the institution uses preferred name in all correspondence and that providing preferred name is not required. Sample language for preferred name form disclaimer:
      - *"This name will be used on email communications to parents and physical mail sent to your home address. Providing your preferred name is not a requirement."*
      - See Carnegie | {{Person-Preferred}} Best Practices and Recommend... document for more information.
  - Search Landing Page RFI
    - The RFI can be suitcased from the Integrated Student Search Suitcase in the Carnegie Slate instance or built from scratch in the client instance.

- When linking to forms within communications, append Person-GUID and other parameters (answers to form questions based on button selection, etc.) so that forms pre-populate with known data points, when possible.
- 💡 Tip: You can also add custom script to your form scripts that allows you to overwrite the "submit" button with custom language.
- Form Communications
  - Confirmation Page
  - Confirmation Email
  - Internal Counselor Notification Email (if requested; for YNM survey in particular)
- Form Communication Process
  - Once a form has been decided on for your client's campaign. Suitcase it in from our Carnegie instance.
  - After the form has been added into the partner instance, reference this document of form templated responses and bring in the email based on the form you are using. Make sure to select a campaign appropriate email template.
  - Make any language adjustments and connect with your creative team member if there are any client specific facts or interesting pieces of information that are relevant to this response.
    - There are templated Asana tasks for this that you can work with your AM/PM on to assign to the copywriter.

      CLIENT: CAMPAIGN - Form - Develop form email copy for form communications sent post form submission (Copywriter)
  - Be sure to set the mailings to send from staff assigned or partner's general email address. Whichever they have asked for.
  - Once complete, make sure to activate the mailing and set the correct trigger conditions.
- Additional Form Examples (finalized list to be added to Carnegie instance)
  - Ultra-concise inquiry form
  - Progressive Inquiry forms
  - Confirm Academic Interest
  - Parent Information Collection
  - SMS opt-in form
  - Yes, No, Maybe (YNM) form (Search, App Gen, or Yield)
  - Survey to non-applicants
  - Important Factors Survey

Search Landing Pages (Back to Table of Contents)

- Search Landing Pages (SLP) are a single view portal landing page that accompanies prospect campaigns with the main purpose of generating inquiries.

- Resources:
    - INT Asana Template
    - EXT Asana Template
    - Other documentation/training resources
- Ownership:
    - Process/Product/Technical Slate: FET with Communications assisting as needed
    - Strategy: Led by Creative with Communications and FET consulted for placement as needed
- Expectations
    - Comms SS/SSA be aware of process
    - Be involved in reviewing and approving the SLP to ensure efficient integration into comms campaign CTAs
    - Reporting for SLP conversions
    - Provide consulting to other team members working on the SLP
    - Adjusting comms testing for just a quick review
    - Creating an RFI form or sharing that link with the portals team
    - Client questions - be able to speak to the SLP integration with comms campaigns
- Discovery Visit
    - During DV, ask about their preferences on an inquiry form and informative content block:
        - If we are to build the inquiry form, build this and send to the Portals Strategist as soon as possible after the DV— you'll be assigned a task to do this
        - If we don't build the inquiry form, send the internal Slate link to the inquiry form to the Portals Strategist as soon as possible after the DV – you'll be assigned a task to do this
    - The Copywriter will recommend ideas for a custom content section. They may consult the SS/SSA to ask if we have any recommendations, but it's their responsibility to make the recommendation
- Portal Production
    - You'll be looped in on the review process; feel free to provide input on design and usability, but be sure to look for Inquiry Form placement and focus on the CTA (should be easy to use and obvious)
    - Portals Strategists will add UTM appended links to search landing pages for anything directing out of the portal (usually just social media links). We will be tasked out to create the UTM appended codes using our builder spreadsheet.
        - Source: carnegie-slate
        - Medium: portal
        - Campaign: campaign name
        - Term: CTA which was clicked in the portal (apply, visit, etc.)
        - *Content: not needed here*
- Including in Comms

    - Once approved, be sure to link out to the portal in all emails pushing to learn more or inquire
        - Prefill by using the portal link and appending key={{Person-GUID}}
        - If you've set up properly and the inquiry form still isn't populating, reach out to the portals strategist and ensure:
            - Dynamic embed
            - URL on portal appended w/ person={{person-GUID}}
- Including in Reports
    - More to come – will include in communications dashboard

Search Landing Page Best Practices

- Purpose: to convert prospects to inquiries
- Example Search Landing Page
- A successful landing page has:
    - **Branding.** Incorporate your institutional branding to build trust with prospective students and stand out from other colleges and universities.
    - **Message match.** Your core marketing message and primary benefit should appear above the fold along with the RFI form and submit button. Headlines, subheads, and paragraph text should be distinctive and allow for easy scanning. Large, compelling, and high-quality images help immerse the prospect in your brand and reinforce your digital advertising messages.
    - **RFI form.** The request for information headline should communicate the value of submitting the form. Use no more than four form fields—for example, first name, last name, email, and academic program of interest. Use a contrasting color, different from your primary brand color, for the call to action button.
    - **RFI confirmation.** Show your lead how you'll deliver on what you promised. Thank them for their interest and provide ways to further engage with your institution.
    - **Benefits.** Clearly communicate why students should complete your call to action. Describe unique aspects of your programs, core advantages of your learning opportunities, or common outcomes. Relevant content shows how your institution can help prospective students overcome challenges or satisfy an immediate need. (custom content section)
    - **Data proof.** Numbers can reinforce your marketing messages in a succinct and compelling way. Use data that relates to a prospective student's goal. (facts and figures content section)
    - **Call to action.** Include a single call to action that compels students to do what it says. Your goal is to get prospective students into your marketing funnel.

    - **Contact methods**. Supplying your address and ways to contact your college or university proves your legitimacy while increasing trust in your brand.
    - **Mobile responsive and ADA compliant**

Postcards/Mailers (Back to Table of Contents)

- Tip: Provide our Creative Portfolio to your partner if they want to see what we've done for other institutions.
- Carnegie | Seed List Template.xlsx - Template that can be used to build a Seed List for a client.
- Carnegie | Communications - UTM Code Builder is used to keep track of the custom UTM codes per print piece for partners.
- Process for Slate Print
    - Configuring Slate Print for the very first time (Part 1):
        - See Slate Print Set-Up Instructions document for additional information.
            - There must be a unique email address associated with the Slate instance in order to configure and use Slate Print.
            - If permission allows, access Database → User Permissions to ensure the email address is unique. If you do not have permission for this, then ask the client to assist in checking.
            - If the email address is not unique, reach out to the Carnegie Help Desk to secure a new alias email address. Below is a sample email message you can use:

> **Subject:** Alias Email Address for [Client Name]
> **Message:** Hello Help Desk,
>
> Can you please help us make an alias email for the Carnegie Security 3 email address for our partner [Client Name]? It should be named **[Client Acronym]-security@carnegiehighered.com**.
>
> Thank you,
> [Your Name]

            - Once created, follow the same process noted above: If permission allows, access Database → User Permissions to ensure the email address is unique. If you do not have permission for this, then ask the client to assist in checking.
    - Configuring Slate Print for the very first time (Part 2):
        - **First**: Database → Messages → Deliver Configuration → Accounts → Add Account → Service → Print → Name → Continue

        - **Second**: Deliver → New Mailing → Name + Method: Slate Print → Edit Message → Manage Templates → [New Window] → Account → Complete all sections, including USPS Nonprofit Authorization Number → Save
            - Note: Client Success team should be aware of the needs of the Slate Strategist vs. Designer. The former needs the Authorization number. The latter needs the Indicia number.
    - Uploading Postcards & Mailers to Slate Print (*scroll further to see letters & envelopes*):
        - New Mailing (Input Name, Folder, User, Method)
        - Edit Message → Manage Templates → [New Window] → New → Select Postcard & Mailers → Select Project Format & Size → Select Paper/Material → Select Finishing Options → Select Production Options → Select Mailing Options → Next [Skip Sample Template Download] → Select & Upload Your Zip File → Upload Zipped File from Creative → Validation Warnings & Errors → View Document Proof → Approve Proof → Name Proof and Folder
        - Common Selections:
            - **Project Category**: Postcards & Mailers
            - **Project Format & Size**: Mailer 6"x9", Mailer 6"x11", Bifold Mailer 6"x9"
            - **Paper/Material**: 120# Dull Cover
            - **Finishing Options**: Apply UV Coat: Yes
            - **Production Options**: Digital
            - **Mailing Options**: Nonprofit
        - Return to Deliver → Edit Message → Select Item from Drop Down
        - Share a link to the mailing and to the proof with your AM/PM team for their final review.
    - Uploading Letters & Envelopes to Slate Print (letters & envelopes):
        - New Mailing (Input Name, Folder, User, Method)
        - Edit Message → Manage Templates → [New Window] → New → Letters, Cards & Envelopes → Envelopes → Select Envelope Size/Type → Select Mailing Options → Next (Skip Sample Template Download) → Select & Upload Your Zip File → Upload Zipped File from Creative → Validation Warnings & Errors → View Document Proof → Approve Proof → Name Proof and Folder → Save → New → Letters, Cards & Envelopes → Letters → Select Letter Size & Type → Add Variable QR Code If Applicable → Select Same Envelope Type From Earlier Steps → Select The Specific Envelope Already Added → Next (Skip Sample Template Download) → Select & Upload Your Zip File → Upload Zipped File from Creative → Validation Warnings & Errors → View Document Proof → Approve Proof → Name Proof and Folder
        - Return to Deliver → Edit Message → Select Item from Drop Down (You will only select the letter, not the letter and the envelope. Slate will know which envelope to use based on what you select while uploading the letter).

        - Share a link to the mailing and to the proof with your AM/PM team for their final review.
    - Steps within Deliver:
        - **Edit Recipient Lists**:
            - New Query:
                - **Exports**: Preferred [or First], Last, Active Street 1, Active Street 2, Active City, Active Region, Active Postal, Active Country.
                - **Filters**: Same filters as population plus subquery filters for:
                    - U.S. address exists -use a global join to address by rank overall 1. Create a subquery export for U.S. address exists. In export, add 'Address by Rank Overall Street 1' and in filters add 'Address by Rank Overall/Country IN United States. Add additional filter of 'Address by Rank Overall/Type IN Mailing Address, Permanent Address.
                    - For Yield and Anti-Melt campaigns especially, filter of Mailing Sent by Status IN Yield Email #01 is helpful.
                - Get approval from the partner for first sends (or all).
            - Upload Spreadsheet: For importing a seed list. Be sure to make your Excel file for upload contain the same exports: Preferred [or First], Last, Active Street 1, Active Street 2, Active City, Active Region, Active Postal, Active Country.
        - **Edit Message**:
            - Template: Select template from dropdown menu.
            - Account: Select account from dropdown menu.
            - Recipient: Input merge fields. *Caution*: {{Preferred}} and {{Last}} should read with a space, such as {{Preferred}} {{Last}} and not {{Preferred}}{{Last}}.
        - **Send Mailing**:
            - Ensure the partner has enough credits to send via Deliver Configuration.
            - Double-Triple-Quadruple Check: Do you have enough credits? Did the partner approve the query? Did the AM/PM see the PDF proof? Did you brush your teeth this morning? ¿Estás prestando atención? Good. Just checking. There is real money on the line.
            - Send Mailing: Review estimated recipients and final cost. The AM/PM may request this info, though it is always a good idea to send anyway.
            - Schedule and/or send immediately.
            - Mailing will be sent to Outbox.
            - Outbox option will appear near the top left. Click on Review Pending.

            - If you are sure you wish to send, click and then type Approve and Deliver Mailing. Done!
- Process for Preferred Printer
    - Generally, the AM/PM will forward the file from Creative to a preferred printer.
    - The AM/PM will ask the SS/SSA for a recipient list, which can be pulled from a new/saved query.
        - Preferred [or First], Last, Active Street 1, Active Street 2, Active City, Active Region, Active Postal, Active Country.
    - The AM/PM will work with the preferred printer from there on the send.
    - The SS/SSA will create the Interaction Code after the send using the send list.
- Process for Custom Print Piece through Slate Print
    - Reach out to Kathleen Cross (Kathleen.Cross@mittera.com) and let her know you have a client that wants a custom print piece. Include as much information on the piece as possible.
        - Example: We had never done scratch off so there were more considerations to take into account than we knew (ie - text on the scratch off, color of scratch off - silver or gold, sending with a clear cover). Also noting, that the piece cannot be variable, it must be static (at least for the scratch off).
    - If the client is not a Mittera client (separate from having Slate Print set up), they will need to fill out the paperwork to get that set. They will need to complete the form, send a W9 and sign the quote of the piece. Kathleen said it would be easier for her to connect directly. Have AM/PM intro the contact via email so that they can see the progress and jump in if needed.
    - Once the final file is complete, AM shares it with Kathleen via email and she will provide an estimated production time.
    - Payment for the piece can be done through an invoice or the recipient list can be sent over via Slate Print and utilize the institution's Slate Credits.
        - To do this, Mittera will send an IMPRINT file to you so that you can send it through Slate Print like you would normally. The IMPRINT file flags them to know that the file has already been printed and the production job is to imprint the address onto the pre-produced mailer.
- Recipient List Recommendations and Ideas
    - Large Sends:
        - All Seniors, All Juniors, or All Sophomores
        - Senior Search, App Gen, or Junior Search Populations, etc.
    - Medium Sends:
        - All Seniors with 150 mile radius
        - All Inquiries and All Prospects within 50 mile radius
        - All Junior Inquiries who opened email #03
        - All Students with a particular engagement score in a single population
    - Small Sends:
        - All Seniors who opened and clicked email #07

        - All Juniors within 30 mile radius
        - All Students without a visit within 50 mile radius
        - All Students with a visit
        - All Students with a particular engagement score in a single population
- Sending Print Pieces in Bulk to Client
    - If a client would like to receive a certain quantity of a print piece directly to their office in bulk, this is very possible.
    - For example, a client wants 1,000 copies of a 6x9 mailer available for counseling staff to take on the road with them during travel season.
    - Generally, just upload the .zip file to Carnegie's SFTP with Mittera. Instructions and general login information can be found in the Communications Resources section.
    - Work with your AM to reach out to Kathleen Cross at Mittera with any questions.
- When the Client Literally Has Zero Idea What Their USPS Nonprofit Authorization Number Is
    - Call Mailing and Shipping Solutions Center (MSSC) at USPS
    - 1-877-672-0007 and they can give the USPS Nonprofit Authorization Number to a client if the client really cannot find it.
    - Do not call 867-5309. Jenny will not answer. Chris Coons might.
- Variable QR Code mailer:
    - Have creative design the print piece based on the appropriate template (the qr code has to go in a very specific place)
    - To create in Slate - follow the standard Slate Print procedures, but select your print option with variable qr code. Continue the process as normal.
    - Building your recipient list, include all standard recipient list exports and filters. You will also need to create a subquery export for the qr code link:
        - Create subquery export:
            - Name: QR Code Link
            - Type: dependent subquery
            - Output: Concatenate
            - Row offset: 1
            - Exports:
                - Click 'Literal'
                    - Name: Link
                    - Literal: https://whateveryourlinkis?key=
                        - You can append UTMs on this link, which we would then use &key at the end instead.
                - Person GUID
                - Save subquery export
    - Return to mailing and click edit message. Add {{QR-Code-Link}} to the link next to QRCODE.
- Slate Print Overview
    - Slate Print Capabilities
        - Keep data in Slate for most real-time and accurate mailing lists

        - Automate print mailings as part of ongoing drip campaigns
        - Personalize print pieces with record data at no additional variable print cost
        - Pay for printing and postage with Slate Print credits
        - Print launches are housed on student records as mailing events for easy ROI tracking
        - Features like personalized QR codes allow for even deeper tracking
        - Upload your packaged design files to Slate Print; can customize pieces to look exactly how you want
    - Slate Print Options
        - Postcards
        - Multi-panel mailers
        - Letters & envelopes
        - Custom projects
    - Carnegie Opinions and Considerations for Slate Print
        - Cost effective compared to preferred print houses
        - Limited paper types and qualities
        - Have seen some print quality issues in the past
        - Quick turnaround times for printing (3-4 days processing/printing)
        - Super helpful staff, always willing to troubleshoot with us

Suitcases for Slate Communications (Back to Table of Contents)

    - Carnegie | Slate Communications Client Onboarding
    - Carnegie | Integrated Student Search
    - Carnegie | Slate Communications Campaign Reportal
    - Carnegie | Slate Communications Value Adds

Query Libraries (Back to Table of Contents)

- Query Libraries for Communication Campaign Reports
    - ***If refreshing query libraries from the 2024 to the 2025 cycle, feel free to reference the notes below for key changes rather than suitcasing in the libraries again.***
    - Communication Campaign Conversions (Carnegie)
        - Date formats have been updated to be based < in place of <=
        - Notes for specific Subquery Exports
            - Average Ping Duration: this was originally listed as a subquery filter and we found it functions better as a subquery expert
        - Notes for specific Subquery Filters

        - First source CX: please note this filter is based off of origin source, so you have the option to pull "all source" details or first source details. To pull all source details, deactivate the filter for "first"
        - Funnel by Origin Source (First Source): this filter differs because it uses the join of Origin Source by First/Last selection. This is primarily useful if the client has utilized origin groups.
        - Carnegie namebuys: this filter is based on the Interactions base but if strategist did not create interactions to track namebuy activity, you can also opt to use filter for either of the two source filters listed above.
        - There are additional subquery filters based on details pulled for the Reports LOB but we have included it here to use this a general conversions query library which will be helpful for both comms and report needs
  - Communication Campaign Performance (Carnegie)
    - Adjusted all exports to computer friendly, cleaner naming conventions
    - Added delivered date parameters to all previous year filters in case you have multiple years of campaigns archived in a folder
    - Adjusted student type, entry term, and major exports to reflect a person base or an application base
    - Fully new exports:
      - Message_credits, message_version, first_origin_source, dart, person_major, app_major, and citizenship_status
- Query libraries are helpful when you need to make custom filters or exports and use them regularly in queries or reports
- Start by customizing the query libraries for your partner, and use them when filtering in the campaign metrics reports or when pulling ad-hoc queries for value adds!
- When subquery exports/filters are customized, share with the partner's Slate contact for them to review and confirm we are pulling the correct decision codes, person statuses, etc.
- The query libraries we create are only available to us due to specific permissions. If the partner wants to utilize the query library, feel free to share with them!
  - To give them access, click into your query library.
  - Click 'Edit Permissions' on the right.
  - Choose the appropriate 'Type' - will usually be 'User'
  - Search for the appropriate User!
  - Choose the permissions! *Edit will allow the partner to make changes to the actual query library, so determine which permission is best based on your relationship with the partner.
- These query libraries also house report value add-on filters which can be customized and used when adding additional data to a report. (Dart/Motivator info, CX, origin sources, form submissions, QR code scans, digital campaign activity, etc.)

- If you find yourself creating a filter or export regularly for your partner, consider building it once and for all in a Query Library!
- [Query Library Knowledge Base Article]

Reports Overview (Back to Table of Contents)

Evolving Ping Reports and Communication Campaign reports, their language, content, ect.

Jump to:

Comms Onboarding	Funnel & Conversions	Search Landing Page Ping Metrics

In an attempt to align on definitions and meaning of conversions, we have compiled a list of Report Definitions that will apply to all Campaign and Funnel Reports. Please reference this document as the source of truth as it pertains to person status and conversion rate definitions. Further development of this section will be completed after further work has been completed on the Reporting Center.

- **Carnegie | Slate Communications Client Onboarding Suitcase**
  - Campaign Metrics Report
    - This is our standard campaign metrics report which details all email performance and conversion metrics by campaign, including year over year data.
    - You can keep all performance and conversion metrics in one report, or split out by campaign or by metric. Whatever works best for your partner is fine (and whatever loads well).
  - When to Send Report
    - This report assists us in knowing how previous email campaigns have performed to different audiences based on days and times of emails sent.
      - This report should be brought over for multi-year clients, but can be a useful value add for first time clients.
    - Required to bring over Translation Codes of sent_day and sent_time as these are unable to be Suitcased.
    - FYI: In instances where reports don't load well, this report will likely not ever render
- **Funnel & Conversions**
  - This report is only required to be built out if a client has a full funnel campaign package.
  - The funnel and conversion report utilizes unique tools that include a YTD admissions funnel through the full funnel process.
  - Each conversation column is specific to that funnel level.

    - A conversion is considered the transition and movement through the funnel.
    - Unique transitions from one stage to the next.
    - App Conversations are trend based. Yield, melt, and their respective rates.
    - Can be aggregated by unique filters or populations.
    - Can include projected goal tracking.
- **Search Landing Page Ping Metrics**
    - This report is only required to be built if there is a search landing page within scope.
    - This report has three parts all built with different bases, so we can get at different data.
        - Message Track, Ping, and Person

If you ever have a client who is interested in reports that go beyond what we build for communications and search clients, here we have examples of reports that can be built with a reporting package.

Report Build Process & Customization Possibilities (Back to Table of Contents)

Jump to:
Campaign Metrics Report | Funnel & Conversions | Search Landing Page Ping Metrics
Data Explorer

- **Campaign Metrics Report**
    - Drip Campaign
        - Edit the year and title of the part to be the current year and campaign type
        - Apply campaign folder to whole part filter as well as the row filter
        - Filters are set to exclude Opener and Parent emails using formulas for those words exactly. Edit these formulas if you have different naming conventions
        - Exports are configured with a row separator to pull the mailing name and UTM Term
        - The Total, Unique Opens, and Unique Clicks columns will total out in a Sum
        - Open rate, Click rate, and Click-to-Open rate will total out in an Average
    - Opener Emails
        - Same as above!
        - Filters are set to include only Opener emails
    - Parent Emails
        - Same as above!
        - Filters are set to include only Parent emails using this word exactly. Edit this formula if your naming convention is different.
    - Responsive Emails
        - Same as above!

- Apply campaign folder to whole part filter as well as the row filter
  - This most likely will be the "Responsives" folder
  - Configure the Mailing Name filter as well if you want to only include responsive emails pertaining to a certain campaign.
- Current Year & Prior Year Conversion Parts
  - Ensure the whole part filter excludes all tags the partner deems "Test"
  - Apply the correct campaign folder to the row filter
  - Move forward editing all filters on all columns to pull in the appropriate details for that partner. These could be highly customizable. Use the query library to pull in the appropriate filters per funnel stage.
  - *Note: If the Search campaign includes Prospects ONLY, remove the New Inquiries count column.*
- **Customization**
  - Below are screenshots of ways to customize this report! Keep in mind specific contract items your partner has to utilize (Darts, CX, name buy, custom forms, digital landing page, etc.)
  - CollegeXpress

	Inquiries			Applicants			Deposits			Net Deposits		
Metric	from Name Buy	All	%	from Name Buy	All	%	from Name Buy	All	%	from Name Buy	All	%
Search Conversions	2562	15607	16.4%	1368	4361	31.4%	48	294	16.3%	48	285	16.8%

	Inquiries			Applicants			Deposits			Net Deposits		
Metric	from CX	All	%	from CX	All	%	from CX	All	%	from CX	All	%
Search Conversions	328	15607	2.1%	171	4361	3.9%	9	294	3.1%	9	285	3.2%

			Applications						Conversion Rates						
Metric	Prospects	Inquiries	Created	Submitted	Completed	Accepted	Deposited	Net Depo...	Inquiry	App Crea...	App Sub...	App Com...	Accept R...	Yield Rate	Melt Rate
2023 Campaign															
Standard C...	4,857	4,496	1,854	1,722	1,626	1,510	468	446	92.57%	38.17%	92.88%	94.43%	92.87%	30.99%	4.70%
PPL Colleg...	136	127	33	28	23	21	2	2	93.38%	24.26%	84.85%	82.14%	91.30%	9.52%	.00%

	Inquiries			Applicants			Deposits			Net Deposits		
Metric	from CX	All	%	from CX	All	%	from CX	All	%	from CX	All	%
CX Conversions	5858	28769	20.4%	1788	14744	12.1%	467	2649	17.6%	445	2561	17.4%

	Inquiries			Applicants			Deposits			Net Deposits		
Metric	from CX	All	%	from CX	All	%	from CX	All	%	from CX	All	%
First Source C...	3901	28769	13.6%	524	14744	3.6%	102	2649	3.9%	95	2561	3.7%

  - Darts/Motivators

App Gen Darted Emails						
#07 App Gen (Darted) - Where could you land, {{Preferred}}?	21787	10060	35	46.2%	.2%	.3%
#09 App Gen (Darted) - Opportunity starts here, {{Preferred}}	18696	9178	26	49.1%	.1%	.3%
#11 App Gen (Darted) - We're the #1 campus in Michigan, {{Pr...	17217	8402	48	48.8%	.3%	.6%
#12 App Gen (Darted) - You're Cardinal material	16309	7513	24	46.1%	.1%	.3%
#15 App Gen (Darted) - There's still time! ⌛	12879	5995	10	46.5%	.1%	.2%
Total	86888	41148	143	47.4%	.2%	.3%

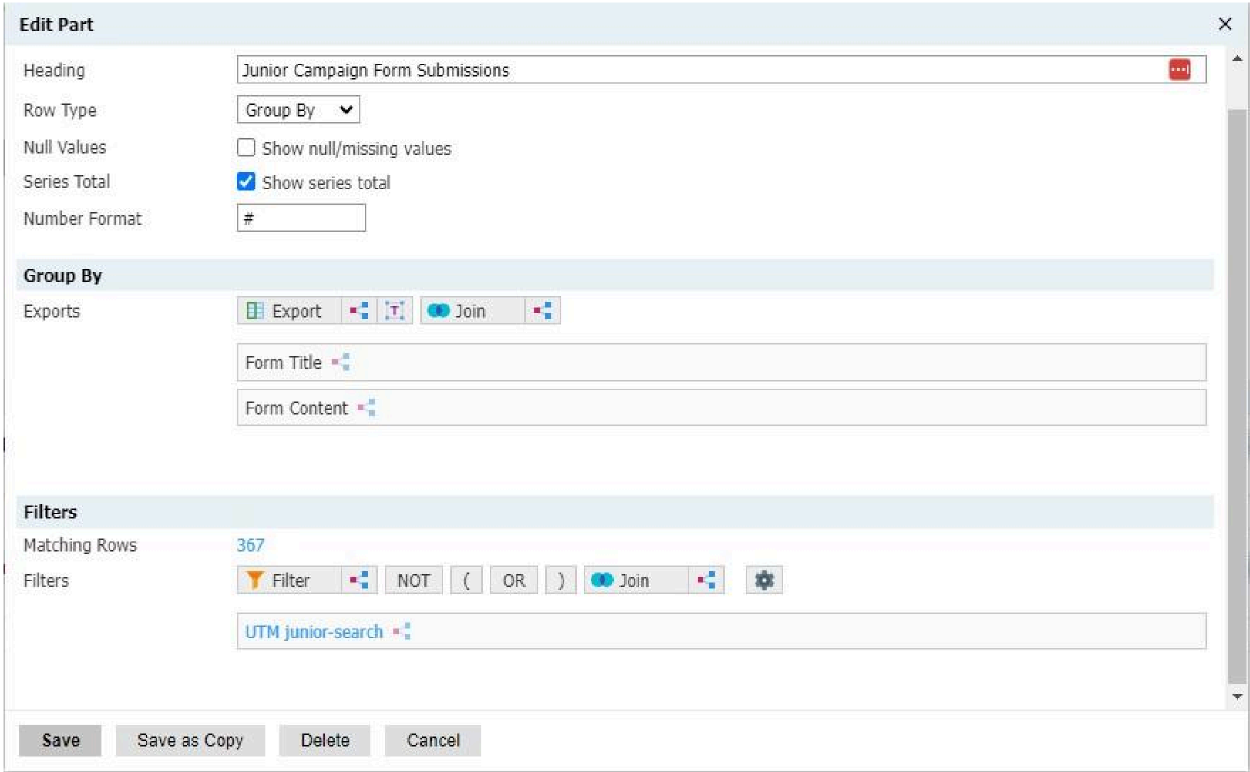
		Applications						Conversion Rates					
Metric	Inquiries	Created	Submitted	Completed	Accepted	Deposited	Net Deposits	App Creation	App Submi...	App Compl...	Accept Rate	Yield Rate	Melt Rate
2023 Campaign by Dart													
Dart 1	5,062	149	146	134	96	3	3	2.9%	98.0%	91.8%	71.6%	3.1%	.0%
Dart 2	3,854	138	126	109	69	4	4	3.6%	91.3%	86.5%	63.3%	5.8%	.0%
Dart 3	1,317	56	51	45	26	4	4	4.3%	91.1%	88.2%	57.8%	15.4%	.0%
Dart 4	6,253	174	166	147	102	8	8	2.8%	95.4%	88.6%	69.4%	7.8%	.0%
Total	16,486	517	489	435	293	19	19	3.1%	94.6%	89.0%	67.4%	6.5%	.0%

		Applications						Conversion Rates					
Metric	Inquiries	Created	Submitted	Completed	Accepted	Deposited	Net Deposits	App Creation	App Submi...	App Compl...	Accept Rate	Yield Rate	Melt Rate
2022 Junior Campaign Comparisons													
Dart 1	4,102	120	117	108	81	3	3	2.9%	97.5%	92.3%	75.0%	3.7%	.0%
Dart 2	2,926	104	96	84	57	3	3	3.6%	92.3%	87.5%	67.9%	5.3%	.0%
Dart 3	1,017	46	42	38	20	3	3	4.5%	91.3%	90.5%	52.6%	15.0%	.0%
Dart 4	4,972	126	121	110	82	6	6	2.5%	96.0%	90.9%	74.5%	7.3%	.0%
Total	13,017	396	376	340	240	15	15	3.0%	94.9%	90.4%	70.6%	6.3%	.0%

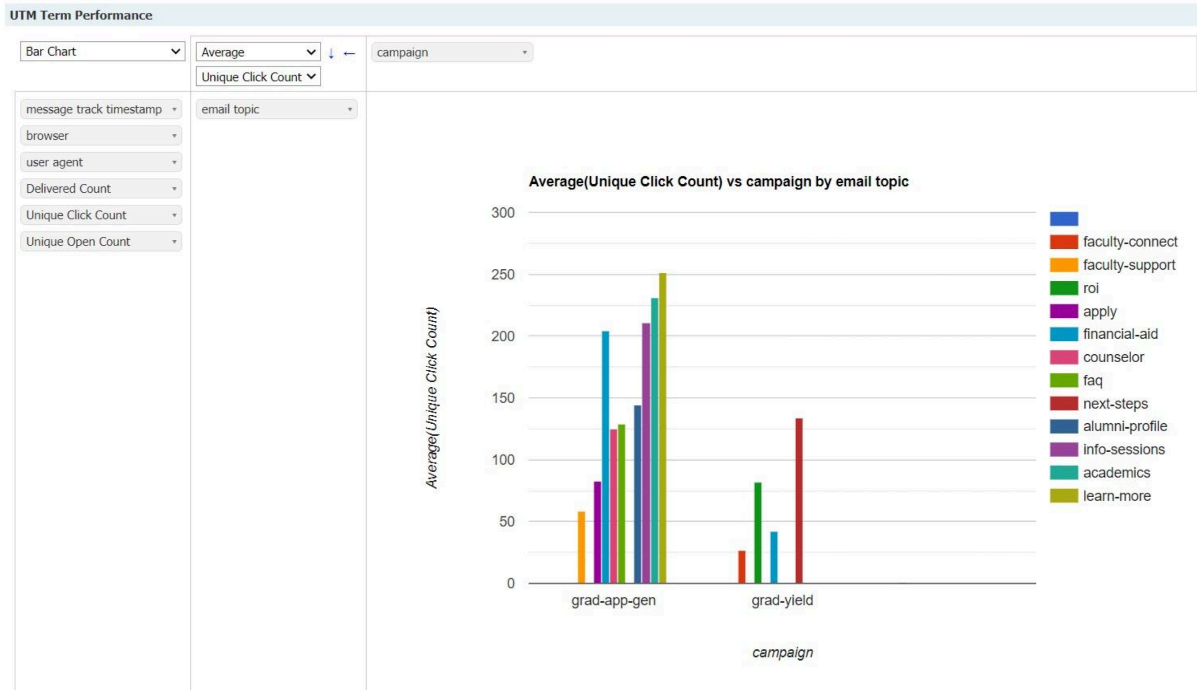
- Form Submissions

Metric	Form Submissions
/ Form Title	
Fall 2023	2
Fall 2024	60
Randolph-Macon College Interest Form	60
Fall 2025	23
Randolph-Macon College Interest Form	23
Fall 2026	2
Spring 2024	1

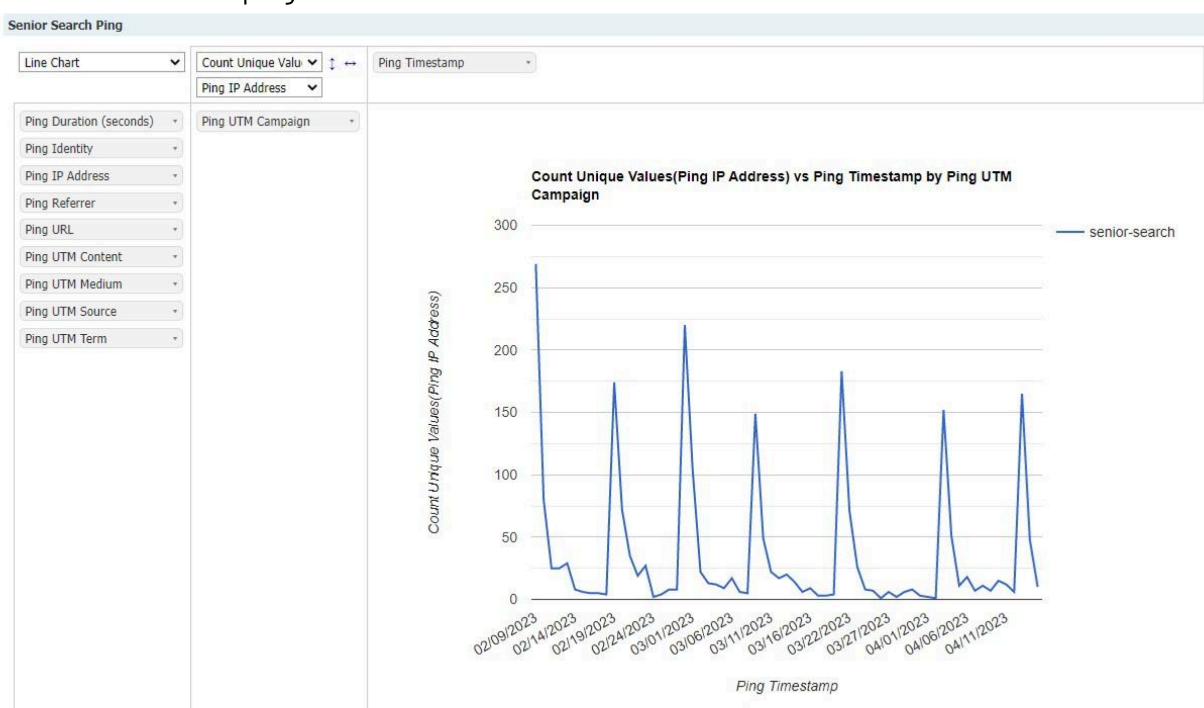
Metric	Form Submissions
Junior Campaign Form Submissions / Form Content	
Tell us more about yourself	367
junior-search-01	49
junior-search-02	31
junior-search-03	244
junior-search-04	27
junior-search-05	7
junior-search-06	2
junior-search-09	5
junior-search-10	2
Total	367
Sophomore Campaign Form Submissions	
Tell us more about yourself	70
Total	70



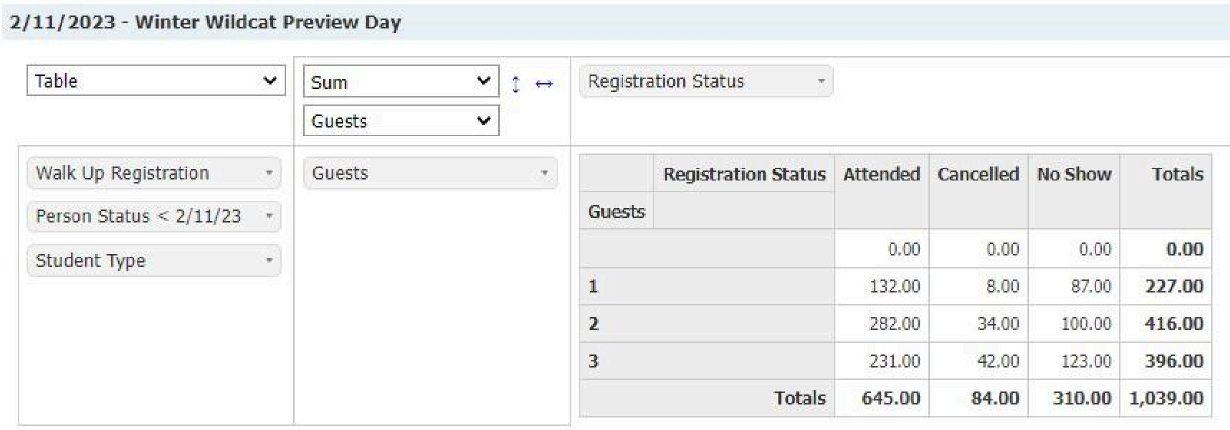
- **Data Explorer**
    - Data explorer can give you customization possibilities which are more similar to an excel pivot table. It is a drag and drop tool so you can add filters and exports to the table overall, and adjust based on what you'd like to see.
        - These are a great value add for the partner! You can set it up so they can adjust the explorer to look at different data, but it won't retain their changes.
        - Explorers also have use during preparing for Annual Campaign Assessments and you need additional data or key insights.
    - This tool is perfect for looking more closely at UTMs without having to build an entire report part.



- Another use would be to rebuild a Google Analytics type report, which shows campaign data over time



- Use Data Explorer for quick numbers like checking event registrations for a responsive email, applications or deposits submitted due to a text. If you just configure new filters when responsives are sent, you can drag and drop rather than creating new queries each time (or storing many random queries in the instance)



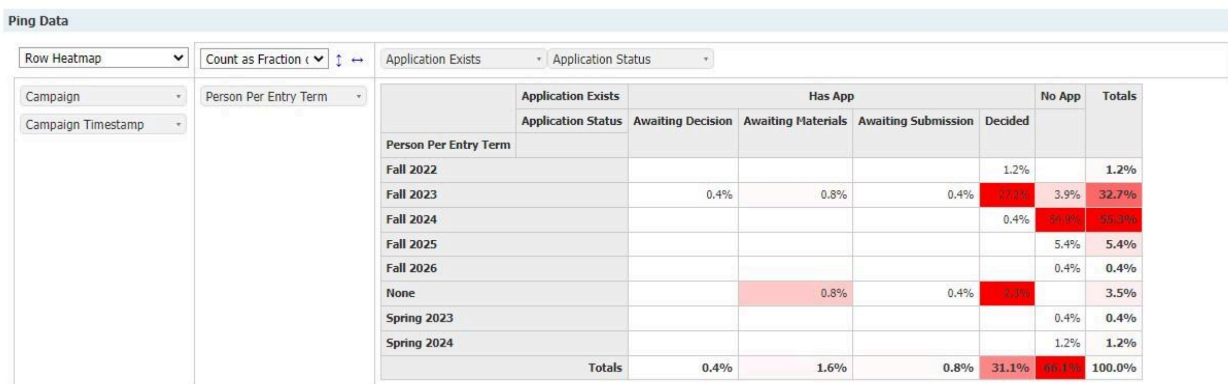
2/11/2023 - Winter Wildcat Preview Day

Table | Sum | Guests | Registration Status

Walk Up Registration | Person Status < 2/11/23 | Student Type | Guests

Guests	Registration Status	Attended	Cancelled	No Show	Totals
		0.00	0.00	0.00	**0.00**
1		132.00	8.00	87.00	**227.00**
2		282.00	34.00	100.00	**416.00**
3		231.00	42.00	123.00	**396.00**
	Totals	645.00	84.00	310.00	1,039.00

- ○ Use Heat Maps to show Ping data in relation to application status, academic program, or student type while cross referencing with multiple campaigns.



Ping Data

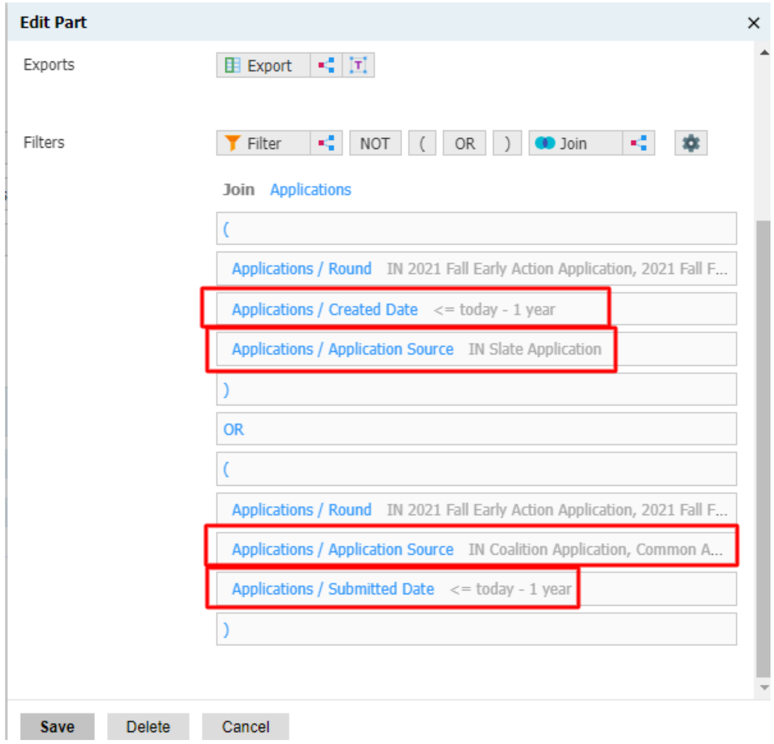
Row Heatmap | Count as Fraction (| Application Exists | Application Status

Campaign | Campaign Timestamp | Person Per Entry Term

	Application Exists	Has App				No App	Totals
	Application Status	Awaiting Decision	Awaiting Materials	Awaiting Submission	Decided		
Person Per Entry Term							
Fall 2022					1.2%		1.2%
Fall 2023		0.4%	0.8%	0.4%	27.2%	3.9%	32.7%
Fall 2024					0.4%	54.9%	55.3%
Fall 2025						5.4%	5.4%
Fall 2026						0.4%	0.4%
None			0.8%	0.4%	2.3%		3.5%
Spring 2023						0.4%	0.4%
Spring 2024						1.2%	1.2%
	Totals	0.4%	1.6%	0.8%	31.1%	66.1%	100.0%

- ○ [Slate Squad Hot Topic Recording on Data Explorer]

- **[Funnel & Conversions]**
  - ○ Use your newly created query library to easily add the appropriate filters to the entire funnel report!
    - ■ If you find you are in need of something else while configuring, add it to your query library before moving on.
  - ○ Common App Application tracking:
    - ■ Common App or Coalition App the "Submitted Date" is the date that it's created in Slate.
    - ■ This would be in your "App Created" column for any past year data, not needed for the current year:

- 

- **Search Landing Page Ping Metrics**
  - Message Track Engagement
    - This part is message track based. The message track table gives tracking information from messages and mailings. This Base is typically very large and requires multiple filters in order to be queried on successfully.
    - Configure the overall part filter with the campaign folder and portal link criteria.
    - Configure the row with the portal link criteria as well. (This duplicate filter may not be needed in all instances, but is sometimes helpful since the message track table is so large).
  - Search Portal Ping - Matched vs Unmatched
    - This part is ping based, so it takes into account all pings on the portal whether the student got there from a campaign communication or not.
    - The top filter should be adjusted based on the portal launch date or campaign launch date, whichever makes sense for your partner.
    - Adjust the portal link in both rows matched and unmatched records who have pinged on the portal overall and their average duration spent on the portal.
  - Search Portal Ping - Persons
    - This part is person based, so it is not a reflection of all activity on the portal. This should be stated very clearly to the client.
    - Configure the new inquiry status date to be when the portal launched or when the email campaign launched.

            - Configure the portal link in the row as well as the timestamp to reflect the date of portal launch or email campaign launch.

Weekly Calls (Back to Table of Contents)

Jump to:

Campaign Performance | Presenting on a Call | FAQs
Call Prep Process | Call Recap Notes

- **Campaign Performance**
    - Overall expectations
        - We as Slate Strategists are responsible for analyzing report data and drawing conclusions to better our campaigns.
        - As we have built real-time reports in the client's Slate instance, they can access performance numbers anytime they'd like.
            - Always offer to send reports to client team members via email
- **Call Prep Process**
    - You should have an Asana task for Call Prep which repeats at the cadence of each partner call. This should be due the day prior to the meeting to ensure the most accurate performance and conversion numbers are pulled.
    - Open all reports/queries for relevant campaigns depending on time of year
    - Look at email engagement and assess ongoing sends based on click and open rates, good or bad. Investigate and draw conclusions about subject matter, subject lines, email composition, etc.
    - Look at campaign conversions and assess totals, YTD numbers (if applicable), and rates. Investigate and draw conclusions about CTAs, conversion strategy, etc.
    - Note 1-2 email engagement insights and 1-2 campaign conversion insights, including key takeaway for each and a recommendation if applicable
    - Consider any key Slate deliverables that need to be reviewed on the upcoming call or any Slate related questions you may have (reviewing population rules, print recipient lists, form configuration, template editability, etc.)
    - Post your performance insights to your internal team via Asana along with any other Slate items you'd like to discuss on the call
        - If you plan to make a responsive recommendation, tag your copy writer in the internal Asana task for awareness.
    - Add performance insights to your client Strategy Doc
    - Example:
        - Anti-Melt #9 - higher open rate than the last three emails, similar amount of clicks. Topic regarding support services & resources
            - Takeaway: As students are getting ready for college, knowing what resources are available is very helpful and important to them. The

subject line clearly grabbed recipients' attention by referring to resources.

    - Sophomore #4 - Lower open rate than the rest of the emails in the campaign which is surprising for a plain text email.
        - Takeaway: subject line seems to imply that the student will be visiting opposed to that we want them to schedule a visit.
        - Recommendation: Visit push responsive email for both sophomores and juniors with a clear and concise visit CTA in the subject line and an emoji
    - Yield Campaign - There was a big jump in deposits this week, resulting in this cycle's Yield campaign yield rate to surpass last year's YTD (6.3% this year vs. 6.0% YTD).
        - Takeaway: Our latest yield email was quite effective in converting students; the plain text message from a counselor with specific steps to deposit generated 29 deposits in the last two days.
  - Takeaways (Why?)
    - Why do we think our insight happened in the way that it did?
    - Consider enrollment/Slate trends, email content, subject lines, send cadence, audience, timing, client/on campus efforts, etc.
  - Recommendations (Now what?)
    - Responsive email efforts
    - Changes in email cadence, subject lines, CTAs, etc. for future campaigns; or if applicable, changes that can be made with the current campaign.
        - For current campaigns, the only changes that should be made are things that can be edited quickly and with little to no approval from the client. I.e. changing the placement of the button
    - Client efforts (call lists, follow ups, etc.)
- **Presenting on a call**
  - Take 5-10 minutes of your 30 minute call reviewing your performance insights
  - Take additional time for additional Slate topics
- **Call recap notes**
  - Only include campaign insight notes and other relevant Slate topic notes/links
  - No need to include campaign engagement/conversion numbers on call recaps
- **FAQs as of 1/24/2024**
  - What if my reports aren't running?
    - Build performance queries and run them each week, and still try to have a working conversion report.
    - Additional option to suitcase in and configure the campaign reportal.
  - How should SS/SSAs split the work?
    - SSAs should follow this same process and send findings to SS to review/add

Campaign Renewals (Back to Table of Contents)

- Campaign Renewals serve as an opportunity for campaigns to be analyzed from a high-level viewpoint, pulling together key recommendations, takeaways, and wins from throughout the cycle and to provide clients with valuable information when making decisions to renew and/or expand services with us.
    - In this document you can find high-level resources, statistics and details regarding the Slate Communications Renewal process.
    INT | Slate Communications Renewal Resources 2024
- This process varies depending on whether or not the client is considered an Integrated Client. An integrated client is one that has at least Slate Communications & Digital Services for the same population of students.
- Timing: March-July
- Integrated Renewals
    - INT | Carnegie Renewals Resource Guide
    - TEMPLATE: Carnegie | Integrated Renewal Deck
    - INT | Integrated Calls Data Guide
    - INT | [Institution] - Renewal Planning 23-24 Notes
    - Renewal Asana Board
    - INT | Carnegie Attribution
- Slate only Renewals (also referred to as Annual Campaign Assessments
    - TEMPLATE: Carnegie | Slate Renewal Deck
    - Slate Only Asana Board
- March 2023 Overview Call
- If you are stuck with strategy for a renewal/ACA, feel free to refer to these recommendations made from prior ACA years:
    - ACA Recommendations (2022-2023)
    - ACA Recommendations (2021-2022)

Cross-Divisional Work & Requests (Back to Table of Contents)

Jump to:

Request Documentation & Resources	CollegeXpress	Script Placements
Suitcase-able Resources	Dart/Motivator Process	Clarity Integrations
	Digital Lists	

Carnegie team members across the company can access this form which walks them through what they need to provide the Slate team to fulfill their request.

Form submissions will then create a task on our Slate Integrated Requests Asana board, where the proper Slate Strategist will be assigned and a due date will populate. After submission, the form submitter should ensure the populated due date corresponds with the turnaround times listed in our documentation or in this resource task (you may need to adjust due dates because of weekends or holidays). Additionally, the Slate AM and/or PM should be added as a collaborator to the task (the form submission confirmation page will prompt submitters to do so).

The following requests can be made via this form:

- Student Data Lists for RMS Projects (Current Student Data + Historical Enrollment Data)
- Dart/Motivator Initial List
- Dart/Motivator Slate Integration
- CollegeXpress Integration
- Digital List
- Digital RFI Form
- GTM Placement in Slate Portals
- Proposal Estimates

The following requests are not part of this form; instead team members will need to go to Jack Calderini directly to get their request fulfilled by the Digital Integrations team:

- Digital Integration/Automation
- Clarity Integration

Request Documentation & Resources

- INT | Slate Requests Resource Guide
    - Refer to this documentation for more information about if requests are in or out of scope
    - If a Dart Code is requested as a query export, you can export the dart number as well as the name.
- Slate Integrated Requests Asana Board

Suitcase-able Resources

- Current Student Data Query (needed for Darts, Motivators, and Demographic Clustering)
- Historical Enrollment Data Query (needed for Darts, Motivators, Demographic Clustering, Zip Code Modeling, and more RMS analysis deliverables)
- Personality Export Query Automation (needed for automated Dart/Motivator tagging)
- Personality Import Source Format (needed for automated Dart/Motivator tagging)

CollegeXpress

Undergraduate:

- Check here for information about your client's CX contract: CX Asana Board

- Detailed instructions: CollegeXpress + Slate Integration Steps
- Confirm with CX rep that files being sent over are CSV files for the new source format
- Adding an Origin Source
    - Add an interaction to the source format mapping to CX Date Processed (day that the student inquired via CX)
        - Parent Code: Carnegie
        - Label: CollegeXpress
        - Export: Carnegie CollegeXpress
    - Set Origin Source as an interaction type so that origin is set by date of the interaction code rather than the source folder/load date
        - Really only is an issue with weekly rather than daily loads
- Use the key to map the correct fields when the first test import comes through from the CX team

Graduate:

- Follow the same instructions for undergrad and request a sample file and key from Sonali, as Grad has different fields.
- If the school has CX for undergrad students and is already using the source format, you will need to create a custom source format.
    - Grad sample file
- Use the same SFTP connection but update the *Import Automation: Import Path/Mask to /carnegie/CX_GR** for grad names.
- Update the undergrad source format *Import Automation: Import Path/Mask to /carnegie/CX_UG** for undergrad names so Slate can differentiate the lists.

Dart/Motivator Process

- Darts: In-Depth Training Part 1 recording (Passcode: 2*BSSp3%)
- Determining & Presenting Darts to the client
    - General timeline of deliverable: Approximately 8 weeks but is dependent on the partner. The partner needs to recruit for the Dart workshop and get the data RMS would need so it varies based on the partner.
        - The Research Analyst compiling data and making sure the Darts get tagged, the Senior Strategist conducting workshops and writing the profiles, AM to coordinate all of the above, and a Content Strategist to help with writing the deliverable.
- Slate Comms Darting Process
- File import/export automation
    - Names from Slate need to be exported and relayed to the RMS team for dart/motivator tagging monthly, and then they need to be loaded back into Slate to add those field assignments to their person record.
    - Confirm with the client that they'd like this to be done automatically
        - SFTP access can be helpful when troubleshooting imports and exports but is not required in order to set up the integration

- Files.com Setup
  - Send an email requesting to HelpDesk@carnegiehighered.com for an SFTP folder and username and password to be created. Copy and paste this message:
    - We are setting up personality tagging automation for ***X CLIENT*** and need an SFTP folder set up in Files.com. Please create a "Slate_SFTP" folder in the Slate folder for this client with full permissions to allow for automatic file deletion. Please grant me access to the folder, and send me the username and password once configured. This is a request from the Slate Division.
  - If you don't have access to a client Files.com folder, ask your AM or fill out this form.
- Query export
  - Create a query in Slate or briefcase this sample query
    - Execution Mode: Retrieve all records each time query is run
    - Filter on the requested population as discussed between the client and the RMS team during the dart/motivator training discussion, and exclude anyone who already has a dart/motivator
    - Add a subquery filter to only pull records on the 14th (Darts) or 7th (Motivators) of the month (comparison, current date with a "dd" format mask = a literal of 14 or 07)
    - Refer to the exports on the Process document or the query, but at a minimum you need Ref ID, name, and address
  - Configure Schedule Export as noted in the sample query, using the username and password credentials from the earlier email
    - Destination: Custom File Transfer
    - Connection: *sftp://Username:Password@files.carnegiehighered.com:22*
      - Example: *sftp://SFTP_Slate_JessTestUniversity:686HpcnJ@files.carnegiehighered.com:22*
      - Feel free to use this spreadsheet to populate your connection based on input username and password; this will be the same as the import source format remote server
    - Path: *InstitutionName_DartorMotivatorExport_%FT%T.xlsx*
      - Example: *JessTestUniversity_DartExport_%FT%T.xlsx*
      - *Note: No longer needed to include an "Exported/" folder path*
      - Please note, this is not the full username that you receive from IT that includes "SFTP_Slate_", only the institution name.
    - Notification: Add our research friends' emails here (gbarrington@carnegiehighered.com,

CTsai@carnegiehighered.com). If you'd like to receive an email when the export runs each month, add your email here too!
    - *Wait to add these emails until after you test so you don't bombard Geni and Candace with test emails*
- Format: Excel Spreadsheet
- Suppress Empty: Suppress Empty Files
- Set the status to "Active" but hold off on selecting any delivery windows until you test
- Note: if export does not run for 90 days, it will go inactive and you will need to touch base with IT.

- Test it out!
    - Hit "Run to SFTP" on the main query page
    - Login to Files.com
    - Navigate to the client's folder, then to Slate, Slate_SFTP
    - Confirm that the export file is there! Go you! You automated the export!
- Activate and get it going!
    - Select the overnight window and every day in the Schedule Export window. Ensure the export is active.
    - Add a task to your Asana board to turn off this export at the end of the dart/motivator tagging contract
    - Check for the first month or so that the queries are exporting on the 14th or 7th.
    - Add an additional filter for dart/motivator Not Exist so future runs do not pick up students who were already tagged.

- Source Format Import
    - Create a new Source Format or briefcase this sample source format
        - Ensure the format is set to "Update Only"
        - Configure Excel formatting (format definition: <layout type="convert" h="1" />)
        - Import path/mask: *InstitutionName_DartsorMotivatorsTagged_*.xlsx*
            - Example: *JessTestUniversity_DartsTagged_*.xlsx*
            - Please note, this is not the full username that you receive from IT that includes "SFTP_Slate_", only the institution name.
        - Import remote server: *sftp://Username:Password@files.carnegiehighered.com:22*
            - Example: *sftp://SFTP_Slate_JessTestUniversity:686HpcnJ@files.carnegiehighered.com:22*

            - Feel free to use this spreadsheet to populate your remote server based on input username and password; this will be the same as the export query connection
        - Set Status to active, but keep remap inactive
        - Test away!
            - Log into Files.com and navigate to your client's Slate_SFTP folder
            - Load in a test tagged file to the main Slate_SFTP folder
                - Feel free to use this one, but be sure to download and rename to fit the import path/mask as outlined above. The * will account for any variable data, such as date timestamps.
            - The file should disappear from the Slate_SFTP folder within 10 minutes and will appear in the Slate source format upload
                - Double check that the file disappears from the Files.com Slate_SFTP folder; if it doesn't delete it will continue to import into Slate every 10 minutes. If you see this issue, delete the file yourself and notify HelpDesk, asking to change the folder to have "full" permissions instead of just read, write, and list.
            - Remap the fields (Ref ID and Dart)
        - Activate the remap for the source format

Digital Lists

- INT | Glossary | Slate Communications & Digital Integration
- The Digital team may ask us for assistance in pulling lists from Slate for different digital targeting or lookalike efforts. They will share parameters and quantities needed in their request form submission.
- If no guidance was provided in order to narrow down lists, consider the following:
    - Records within a certain mile radius from campus
    - Records who have clicked on X number or more emails
    - Records by market (primary, secondary, tertiary) or state
    - Records who have pinged on a specific page (academic page, campus life pages, webpage with RFI) within X days
    - Records who have attended an event/visit
    - Does the institution have any scoring system? Engagement weighting, model scoring, etc.
    - Students under 18 may need to be excluded from some lists - such as Facebook lists. The digital strategists should specify if age matters but you can always ask if you're unsure or reference the digital campaign glossary linked above

Script Placements

- How-To: Add GTM container script code to your Branding Template

- [Embedding Google Analytics and Conversion Tracking]

Clarity Integration

- Clarity Client Looker (Data) Studio Dashboards
- All Clarity Integrations are handled by the Digital Integrations team. Included here are just reference links; we will not need to complete any of these integrations.
    - Guide - Clarity & Slate Team Process for Integration
    - Example Data to Read/Write Worksheet –
      Carnegie | Ohio Northern - Clarity+Slate Integration Worksheet

Slate Video (Back to Table of Contents)

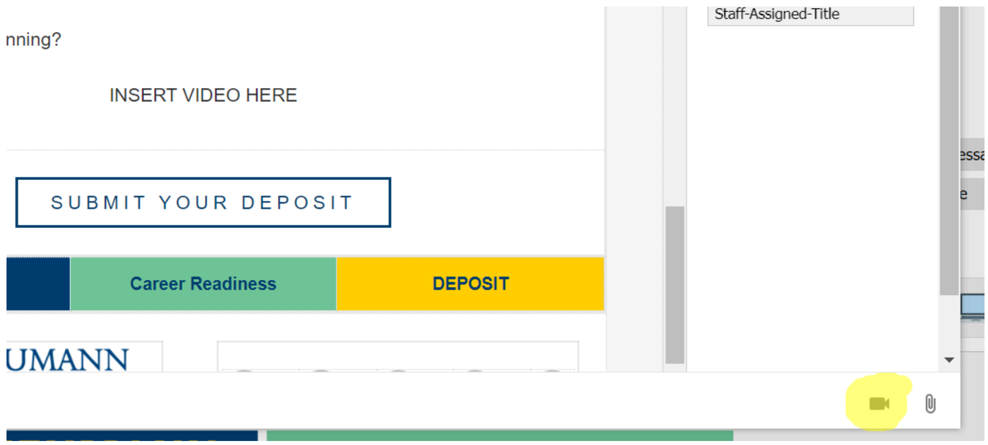
General Process:

1. After a communication plan is approved, the AM/PM will add Asana tasks to build out email shells for any Slate Video emails planned with due dates two weeks (or more) before the anticipated send date in order to give the client time to record their video. No approved copy is needed to assign this out, but if we have offered or the client requests talking points, those should be included in this task. The AM/PM will also include a link to a Content Needed tasks that the SS/SSA can add the email link once ready.
2. After email templates are approved, the SS/SSA builds the email shell using the appropriate template and adds in the words "Insert Video Here" into the email. Instructions below outline this process for the SS/SSA.
3. SS/SSA posts the link to the Slate Video shell and any talking points to the client in Asana in a Content Needed task that the AM/PM created, relaying a desired due date for the video to be recorded. If the client is new to Slate Video, they can also post these instructions to the client.
4. After the client records the video, the AM/PM may request a link to the video so the copywriter can view it and write copy around it. Slate Strategists will need to click into the external video link from the Slate mailing, copy that link, and send to the AM/PM.

*Note: we can still accommodate Youtube or Vimeo links in our mailings by creating a screencap image with a link. However, we do recommend Slate Video to partners so that we can track video views and conversions through Ping.

Strategist Steps:

1. Carnegie team members are responsible for building the mailing for the client, this can be done with or without official copy. Leave a note “Insert Video Here” within the mailing after adding in the template (or, if plain text, just add in the Insert Video Here text). Post link to the mailing to the client so they are able to record their video.

   a. If the client is new to Slate Video, you can send client these instructions: Slate Video set-up instructions
2. Client will open mailing and click edit message. Once they have the mailing open, they'll want to click next to the "Insert Video Here". This will place their video in the correct spot and not above the template or floating in a location that causes template coding issues. If the video does get recorded in the wrong spot, like above the header, the strategist can copy and paste the <div> tags into the correct spot in the email
3. Client will click the record button at the bottom right side of the message box.
   a. 

4. From there, they can record the video. We recommend videos that are no longer than 30 seconds. Once they've recorded it, they will click insert and it will be added to the mailing.
   a. If they need to redo their video while still in the video box, they can just click restart.
   b. If they need to redo their video after inserting it into the mailing, they will need to delete their video and click the record button again.
   c. Sometimes the beginning of a Slate video gets cut off, so clients are encouraged to pause for a moment before starting, then watching the video to make sure nothing was dropped.
5. Once the client is happy with their video, they will notify the Carnegie team to finish the mailing.
6. A Carnegie team member will need to go into the mailing's code to edit the video to be mobile responsive. Below is an example of a Slate video code:
   a.
```
<div style="width: 250px; height: 216px; margin: 0px auto;">
  <a href="https://slate.neumann.edu/go?cmd=video&amp;id=343a7cb1-39de-4b79-9277-6b977cb578b2"><img src="https://slate.neumann.edu/go?cmd=video&amp;id=343a7cb1-39de-4b79-9277-6b977cb578b2&amp;context=thumbnail" style="width: 250px; height: 216px;" /></a>
</div>
```
      i. If the video needs to be moved within the mailing or to a different mailing, this is all the code that needs to be moved.
   b. The highlighted sections will need to be adjusted to fit a mobile screen. The width set to 250px and height to 200px normally works best for both mobile and desktop. You could also set width to 85% or a different percentage
   c. You can add class="adapt-img" to both the <div> and <img> tags in the video section of code to ensure mobile responsiveness

i. If you are using a plain text email, you will need to add the following highlighted code to the head of the source code to make sure that it functions appropriately

```
<head>
  <title></title>
  <style type="text/css">@media only screen and (max-width:600px) {.adapt-img { width:100%!important; height:auto!important }}
  </style>
</head>
<body>
  <p style="Margin:0;-webkit-text-size-adjust:none;-ms-text-size-adjust:none;mso-line-height-rule:exactly;font-family:arial, 'helvetica neue',
```

7. After the code is adjusted for mobile responsiveness, you are able to move forward with adjusting copy or sending the message.

Slate Video Notes:

1. You are only able to have **one** Slate video per mailing. You cannot add multiple videos and add segmentation around them.
2. You are able to add a Slate video into a text message but it does come up as a link in the student's messages.
3. You can blur your background or add a new background through Slate video.
4. If you accidentally delete a video, you can go into snapshots and retrieve the code to add back into the mailing.
5. Slate videos can be recorded on desktop or mobile devices via the Slate app
6. You may use Slate Videos in content blocks.
    a. An individual mailing, per video, still needs to exist. Have the client record one video in each mailing.
    b. When all mailings are complete, create your content blocks as you normally would.
    c. Copy the Slate Video code from each individual mailing, into separate snippets within the Content Block 'Key'.
    d. Add the {{export | snippet: "key"}} as you would normally within the overall Slate Deliver Message, where the Slate Videos should appear and TEST!
    e. Once everything looks good, archive the mailings that each client recorded in. This way only one mailing exists and it won't have to be segmented out of the performance report. (And definitely don't delete the mailings that each client recorded in, just archive! Deleting will cause the videos to no longer work/exist. You can even title it or add a subject line of "Do not delete" to be safe)

Admitted Student Research (Back to Table of Contents)

The Admitted Student Research (ASR) service is a survey that we build for clients to ask their admitted students why they chose or did not choose to attend the school. This project is done in collaboration with RMS and the Slate Communications Division. Hot Topic Recording

- Responsibilities:
    - **Survey Build:**
        - Slate Communications Strategist if the client has Slate Comms in their contract; i.e. a Search or Full-Full Comms client

        - Slate Reportings Team (aka - Amanda Garay-Cedeno) if the client does not have Slate Comms in the contract
    - **Email Builds & Scheduling:** Slate Communications Strategist
    - **Reporting Center:** Slate Reportings Team
    - **Question Selection Strategy and Results Analysis:** RMS Strategist
- Detailed Slate instructions and resources for the project as a whole can be found here: ASR Slate Documentation (updated 12/13/2023)
- There is a template for all Asana tasks related to this project. Your AM/PM on the project will assign you the necessary tasks.
- Timeline of project execution:
    - The ASR is designed to be sent out to students immediately after they make a decision to deposit or withdraw and can be sent out post May 1 to admitted students who have not informed the school of their decision to attend or withdraw so depending on the school it potentially could be running for several months of the year. However, a school could sign on for this late spring and we can still promote the survey during just the summer months to all admitted students.
- If you encounter any issues or have questions while working through this process you can reach out to the following people:
    - Survey (form) or email questions: Allison Steinberg
    - Reporting Center and data questions: Amanda Garay-Cedeno
    - Question selection and strategy: Jared Brickman

Project Close-Out Steps (Back to Table of Contents)

INT | Slate Optimization - Project Close Out Process_6.16.23

Google Looker Studio Benchmarking (Back to Table of Contents)

INT | Looker Studio Client FAQs

INT | Slate Communications Analytics Handbook

- Dashboard Link
- Client Onboarding
    - The Campaign Analytics team will build all queries for Looker Studio in the client instance using the discovery visit documentation and built and approved Query Libraries as a guide. The CA team will reach out to the SS/SSA as questions arise regarding client Slate nuances to consider.
- Client Renewal
    - *If the client is renewing, there are a few items to consider as it involves the Looker Studio queries. Please use the below information to think through the potential changes. Reach out to the CA team if you need assistance.*

        - Did the client add on Darts, Motivators, Name Buys or EnGauge scoring this cycle and it was not present last cycle?
        - Is there a change in scope of student types which we are communicating to?
        - Did you have lingering Underscore naming conventions last cycle, and now you've completely switched over to Carnegie?
        - Did any of their applications change? For instance, do they now offer Common App where they didn't last cycle?
        - Has the client adjusted criteria for defining an Admitted, Deposited, or Withdrawn student?
    - When you are adjusting queries, do not change the names of the exports.
    - If you have any questions about edits, please reach out to the Campaign Analytics team via the Asana task.
- Ongoing Considerations throughout the cycle
    - There are Asana tasks to remind you to add new campaign folders or form folders to the Looker query suite.
    - If the client adds other Carnegie scope during the cycle like Darts, Motivators, Name Buys, or EnGauge scoring, please let the CA team know so we can export relevant information.
    - Applications: are they a newly implemented client, so they are now using a Slate Application
    - Decisions: has an adjustment been made to the criteria used to define an Admitted, Deposited, or Withdrawn student?
- Client Project Close-Out
    - Asana houses a close out task when a client is not renewing Slate Communications with Carnegie. Steps detailed in this task are as follows:
        - In all Looker Studio queries (14 in total), Edit, Edit Web Service, remove the Service Type so this field is now blank.
            - *If you do not have Edit Web Service permissions, simply archive all queries. You may let the client know this has been done in case they'd like to remove the Web Service themselves.*
        - Archive query.
        - Once all queries are complete, flip the task to the Campaign Analytics team so the client can be removed from the BigQuery import list.
        - All client data will remain in Looker Studio for historical reference.

Campaign Reportal (Back to Table of Contents)

Use Case:

- *The campaign reportal is not a required deliverable for the Slate Strategist to build. However, if campaign metrics reports do not load, it is encouraged to have another* *reporting option in Slate for the partner to view. It's also helpful when analyzing data for the ACA report to have easy access to this data.*

- Suitcase 'Carnegie | Communications Campaign Multi-View Reportal' from Carnegie instance.
- Update the View/Campaign you wish to populate in the reportal via queries. Each view has 2 queries assigned to it.
    - View One =App Gen
        - Overall Search Results 1 and Campaign Counts 1 queries.
    - View Two = Senior Search
        - Overall Search Results 2 and Campaign Counts 2 queries
    - View Three= Junior Search
        - Overall Search Results 3 and Campaign Counts 3 queries
    - View Four = Sophomore Search
        - Overall Search Results 4 and Campaign Counts 4 queries
    - View Five = Yield Overall Search Results 5 and Campaign Counts 5 queries
    - View Six = Anti-Melt
        - Overall Search Results 6 and Campaign Counts 6 queries
  - In 'Overall Search Results' queries:
    - Edit the folder structure in the 'Campaign' subquery filter to pull the appropriate campaign folder.
    - Click 'Schedule Export'. Set 'Status' as 'Active'. Set 'Requested Delivery Window' to 'Overnight'. Check all 'Requested Weekdays'.
  - In 'Campaign Counts' queries:
    - Edit the folder structure in the subquery exports.
        - *Total_total, opens_total, and clicks_total:*
            - Edit folder structure within the 'Campaign' subquery filter to pull in the appropriate campaign folder.
        - *Open_rate_total, clicks_rate_total, clicks_thru_rate_total subquery exports:*
            - Both 'total' and 'open' subquery filters need to have their 'campaign' subquery filter updated.
    - Click 'Schedule Export'. Set 'Status' as 'Active'. Set 'Requested Delivery Window' to 'Overnight'. Check all 'Requested Weekdays'.
  - **by editing the schedule export to 'Overnight' your views will be updated and refreshed overnight. If you need to have data in the reportal immediately, you can click 'Refresh View' on all corresponding queries to pull the data in.*
- In Database, click 'Portals' and then click 'Carnegie Campaign Report'
  - Click 'Edit' and ensure the portal status is 'Active' (and save)
  - Click the hyperlinked URL and check out your data!
  - Pin this portal for easy access in the future!

Resources [(Back to Table of Contents)]

- Tips and Tricks (Comms Section)
- Professional Development Opportunities (HTML LinkedIn Learning, etc.)
- Knowledge Base links
- Deliver Accessibility Resources
- Carnegie Acronym Guide
- Trainings
    - Video Recordings
    - Documentation - this is accessible through the templates feature within your Drive.
        - Within Drive > New > Google Docs > From a Template > Scroll down to Slate Optimization > Each of the documents starting with "Carnegie | [CLIENT]" are training templates/resources.
- Campaign Refresh Documentation
    - Step by step instructions to refresh a population rule for the next year's campaign
- Email Deliverability
    - Best practices to ensure for email deliverability and to avoid spam filters
- INT | Slate Communications Bootcamp 2024