

YOUR GUIDE TO SLATE CRM UPKEEP

Never miss a step in your annual cycle prep with Spark451's convenient guide!

Cycle prep runs from summer to early fall. However, your exact timing will vary based on your institution's unique needs and processes. When planning your cycle prep schedule, weigh what changes are necessary for the upcoming admissions cycle against all wish-list items you have in mind for your CRM.

ANNUAL SLATE UPKEEP

Perform these tasks to get ready for the upcoming cycle

Item	Difficulty	✓
Staff Assignment Rules Updates	🔥🔥🔥	
Material & Checklist Items Audit	🔥🔥🔥🔥	
Update Decision Letters & Codes	🔥🔥	
Strategize Your Populations <i>How are you leveraging populations?</i>	🔥🔥🔥	
Batch Acquire Review	🔥🔥	
Consolidate Records Review <i>Are the counts in these tools manageable?</i>	🔥🔥🔥	

DELIVER

Enhance your communications

Item	Difficulty	✓
Review Scheduled Campaigns	🔥🔥🔥	
Email Template Updates <i>Test for mobile responsiveness.</i>	🔥🔥	
Recipient List Queries Updates <i>Are the right filters established?</i>	🔥🔥	
Liquid Markup & Custom Personalization	🔥🔥🔥	

APPLICATION PREP

Maintain a top-notch application

Item	Difficulty	✓
Periods & Rounds Updates <i>Have you created them for the upcoming cycle?</i>	🔥	
Application Forms Updates	🔥🔥🔥🔥	
Streamline Application Questions <i>Only ask questions that you need answers to!</i>	🔥🔥	
Status Page Updates & Additions <i>Dynamic content and multi-tabs are 🤖</i>	🔥🔥🔥🔥	
Application Logic Updates & Testing	🔥🔥🔥	
Clear Bins	🔥🔥	
Move Defers Forward	🔥	
Withdraw Old Applications	🔥	
Updates to Third-Party Applications <i>Common App, Coalition, CAS, etc.</i>	🔥🔥🔥🔥	
Reader Workflow Review <i>Do you like how your reader workflow is set up?</i>	🔥🔥	
Cycle Prep Status Page Review	🔥	

USER PERMISSIONS

Confirm all Slate users are seeing what they need to see

Item	Difficulty	✓
User Permissions Cleanup & Audit <i>Remove inactive accounts and confirm permission levels.</i>	🔥	
Staff Assignment Rules Updates	🔥🔥🔥	
Impersonate New User Accounts <i>Confirm permissions function as intended.</i>	🔥🔥	

DATA HYGIENE

Crucial items for maintaining queries, reports, and overall database health

Item	Difficulty	✓
Updated Configurable Joins Libraries	🔥🔥	
Turn Over Scheduled Queries & Reports <i>What's necessary for this cycle?</i>	🔥🔥🔥🔥	
Review Integrations	🔥🔥🔥🔥	
Create Source Formats <i>Are there any new integrations you'd like to build?</i>	🔥🔥🔥	
Update Source Formats <i>Refresh prompt values!</i>	🔥🔥	
Job Activity Monitor Audit	🔥🔥	
Migration to Configurable Joins <i>How is your transition going?</i>	🔥🔥🔥🔥	

IN-DEPTH REVIEW

Identify next steps and mark them complete

Item	Difficulty	✓
Organizations Dataset Updates	🔥🔥	
Rules Health Audit <i>Any erroneous rules?</i>	🔥🔥🔥	
Compliance Dashboard Audit	🔥	
Ping Implementation Review	🔥	
Origin Sources Review <i>Remember these?</i>	🔥🔥🔥🔥	
Create New Event Templates	🔥🔥	
Update Current Event Templates	🔥🔥	

PROACTIVE MEASURES

These additional steps will help you make big gains

Item	Difficulty	✓
Activate Early Access Features	🔥🔥	
Migrate to Workflows	🔥🔥🔥🔥	
Update/Configure Slate.org Profile	🔥	
Buy Deliver Credits	🔥	
Hire Spark451 to Help	🙌	



Need a hand?

Spark451's comprehensive **SparkAssist** service may be exactly what you're looking for. No job is too big or too small for our CRM experts. Reach out today to learn more!