



**CHARLOTTE**  
*GRADUATE ADMISSIONS*

**Five Ways to Optimize Your  
Recruitment and Marketing in Slate**

March 2024

# Introductions



**Sabrina Brown**, Director of Graduate Recruitment



**Ellie Ivey**, Graduate Enrollment Coordinator



**Hannah Adam**, Graduate Admissions Counselor



**Sam Carboni**, Director of Marketing & Communications

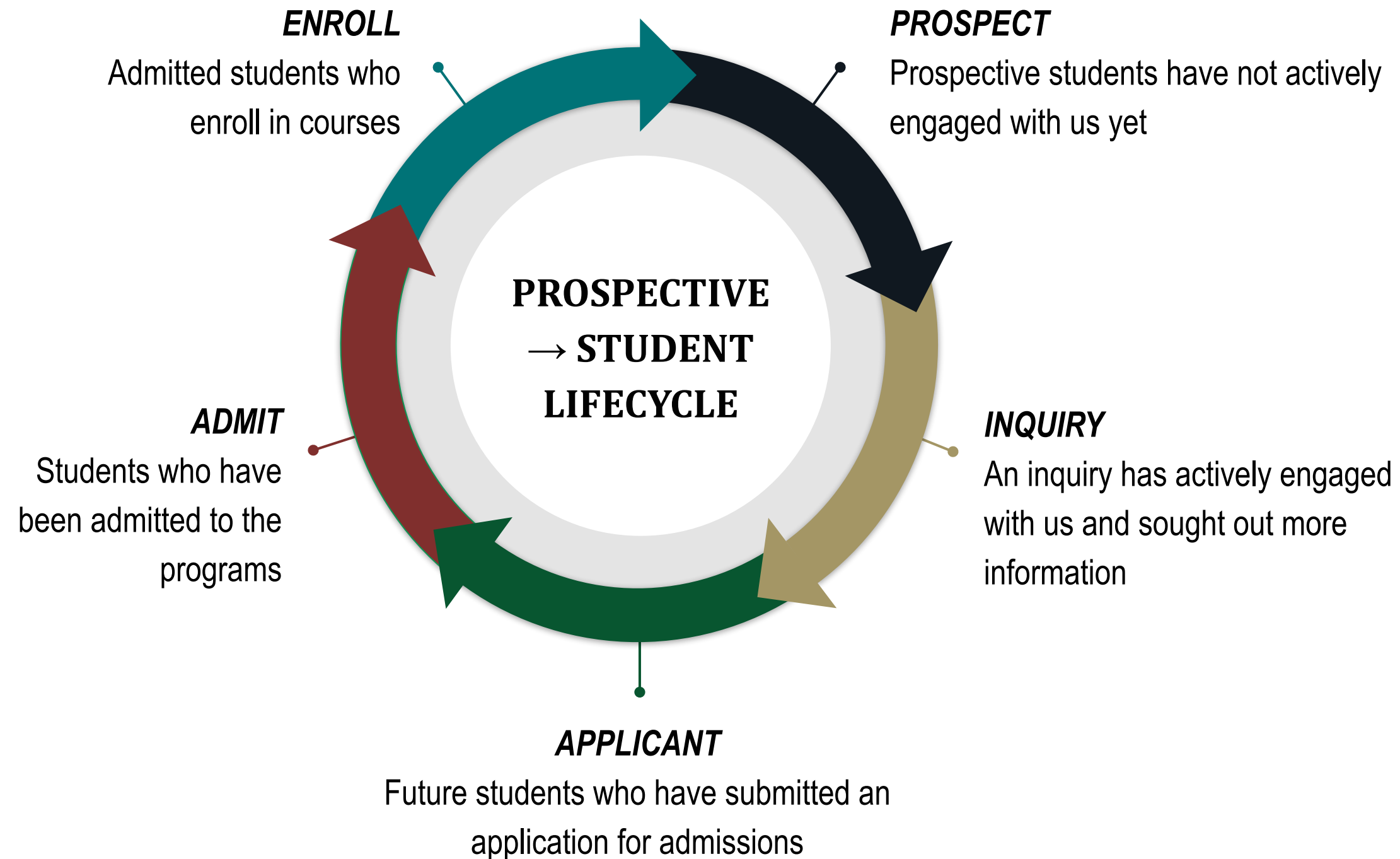


**Devin Long**, Marketing Specialist

# Overview: *Five Ways to Optimize Your Recruitment & Marketing in Slate*

- 1) Managing Your Pipeline with the [Graduate Program Portal](#)
- 2) Maximizing Running Communication Campaigns
- 3) Utilizing Slate Features to Nurture Contacts
- 4) Leveraging Event Management Tool
- 5) Enhancing Search Capabilities

# Prospective → Student Lifecycle

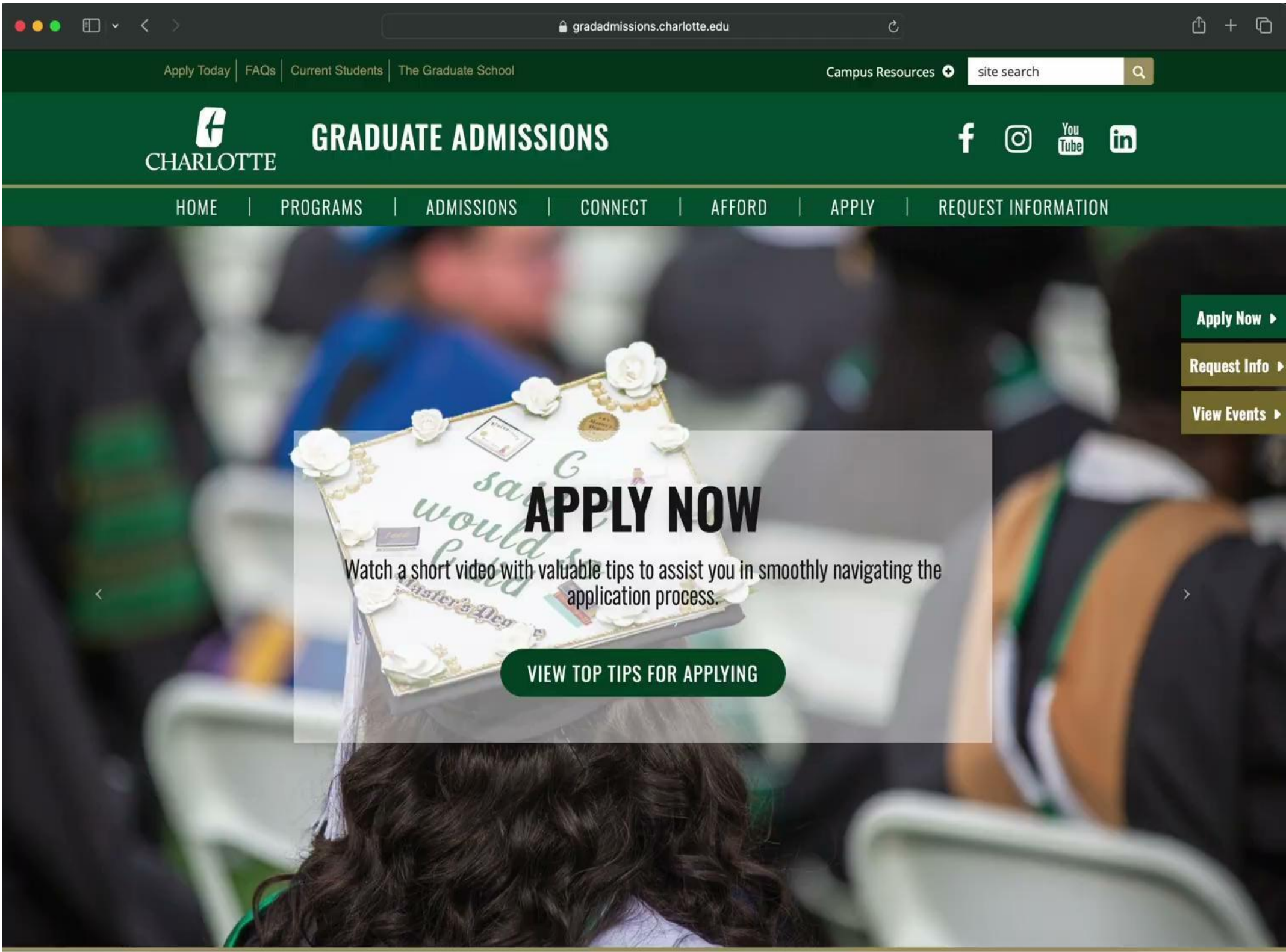


# Managing Your Pipeline with the Graduate Program Portal

- Graduate Program Portal
  - Dashboard
  - Applications
  - Prospects
  - Events & Forms
  - Reports
  - Program Info



# Managing Your Pipeline with the Graduate Program Portal - *Forms*



# Managing Your Pipeline with the Graduate Program Portal

- Organic lead generation through embedded forms on gradadmissions.charlotte.edu webpages

**CHARLOTTE GRADUATE ADMISSIONS**

HOME | PROGRAMS | ADMISSIONS | CONNECT | AFFORD | APPLY | REQUEST INFORMATION

Home / Bioinformatics (MS)

## BIOINFORMATICS (MS)

College of Computing and Informatics | Master's | Main Campus | STEM Designated

**REQUEST INFORMATION**

First Name \*

Last Name \*

Preferred First Name?  
 Yes

Email Address \*

Mobile Number

By providing your number you consent to receive marketing/promotional/notification messages from UNC Charlotte, to opt out reply STOP at any moment. Message & data rates may apply.

**SUBMIT**

**APPLY NOW**

The program Bioinformatics MS is an interdisciplinary program at the intersection of the disciplines of Biology, Chemistry, Mathematics and Statistics, Computing and Informatics and Engineering. The program is structured to provide students with the skills and knowledge to develop, evaluate and deploy bioinformatics and computational biology applications. It is designed to prepare students for employment in the biotechnology sector where the need for knowledgeable life scientists with quantitative and computational skills has exploded in the past decade.

### PROGRAM DIRECTOR

Elizabeth Cooper  
ecoop23@charlotte.edu  
704-687-2402

**PROGRAM WEBPAGE**

**UNIVERSITY OF NORTH CAROLINA CHARLOTTE THE GRADUATE SCHOOL**

Dear Rebecca,

Thank you for expressing interest in the Bioinformatics (MS) program at UNC Charlotte.

Start your path to an extraordinary future by taking the next step. Secure your spot at an [upcoming information session](#) where you can delve deeper into admissions requirements and gain insights into the application process.

In the meantime, the [Graduate Admissions website](#) is a comprehensive resource to further your understanding of graduate program offerings, admission details and more.

We're here to support you along the way.  
- **UNC Charlotte Graduate Admissions Team**

**REGISTER FOR INFO SESSION**

9201 University City Blvd.,  
Charlotte, NC 28223  
[gradadmissions.charlotte.edu](http://gradadmissions.charlotte.edu)  
(704) 687-5503



# Managing Your Pipeline with the Graduate Program Portal - *Forms*

Flow: Google search ad → landing page → form submission → lead nurturing

The screenshot displays the 'Graduate Program Portal V3' for the University of North Carolina Charlotte's School of Data Science. The page features a dark green header with the university logo and navigation links. A sidebar on the left lists 'ADMISSIONS' options, with 'Master's of Science' highlighted. The main content area includes a promotional banner for the Master's of Science program, featuring a graduate and the text 'Future-proof your career with advanced skills in Data Science and Business Analytics'. To the right, a 'REQUEST INFORMATION' form is visible, containing the following fields and options:

- First Name \***: Text input field containing 'Test'.
- Last Name \***: Text input field containing 'Test'.
- Preferred First Name?**: Radio button for 'Yes' (checked).
- Preferred Name**: Text input field containing 'TestingSam'.
- Email Address \***: Text input field containing 'sam.carboni+0313'.
- Mobile Number**: Empty text input field.
- By providing your number you consent to receive marketing/promotional/notification messages from UNC Charlotte, to opt out reply

The footer contains copyright information for 2024 UNC Charlotte and links for 'Contact Us', 'Terms of Use', and 'University Policies'.



# Managing Your Pipeline with the Graduate Program Portal - *Forms*

- Using forms in paid media placements allows the ability to track contact through the funnel = *demonstrating ROI*

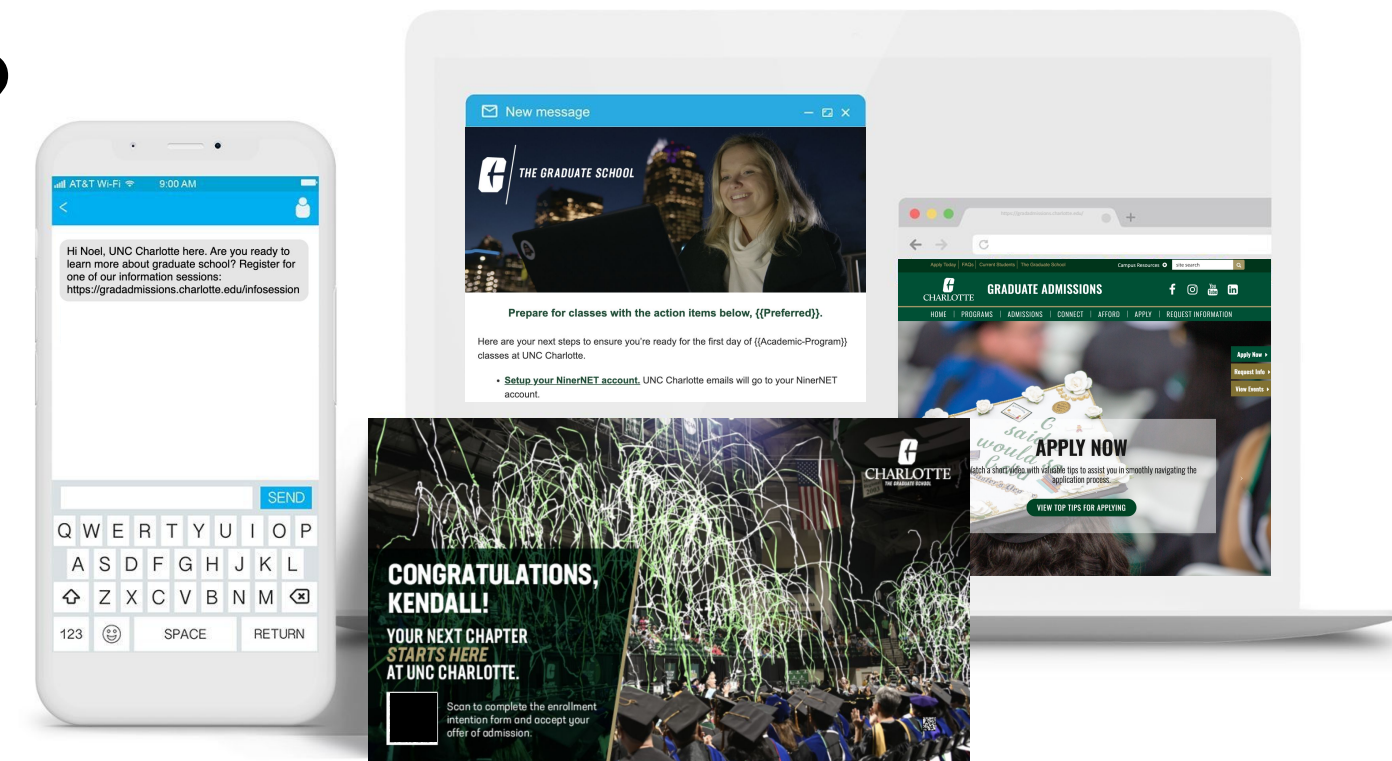
The screenshot displays the 'GRADUATE ADMISSIONS' portal for Charlotte. The user is logged in as Samantha Carboni. The navigation menu includes Dashboard, Applications, Prospects, Events & Forms (selected), Reports, and Program Info. Under 'Events & Forms', 'Campaign Contacts' is selected. The page allows filtering by UTM Campaign (SDS Graduate Search) and UTM Source (google). A 'Submissions' button is highlighted with a red box. Below the filters is a table titled 'Dynamic Short Form (All Programs)' with columns for Last Name, Preferred Name, Email, Submitted Date, Campaign, Source, and Type. The table contains 15 rows of submission data, with the row for 02/08/2024 highlighted in green.

Last Name	Preferred Name	Email	Submitted Date	Campaign	Source	Type
			01/20/2024	SDS Graduate Search	google	form
			01/24/2024	SDS Graduate Search	google	form
			02/22/2024	SDS Graduate Search	google	form
			02/28/2024	SDS Graduate Search	google	form
			02/20/2024	SDS Graduate Search	google	form
			02/12/2024	SDS Graduate Search	google	form
			01/19/2024	SDS Graduate Search	google	form
			02/08/2024	SDS Graduate Search	google	form
			02/20/2024	SDS Graduate Search	google	form
			02/13/2024	SDS Graduate Search	google	form
			02/23/2024	SDS Graduate Search	google	form
			02/06/2024	SDS Graduate Search	google	form
			01/28/2024	SDS Graduate Search	google	form
			02/29/2024	SDS Graduate Search	google	form
			02/13/2024	SDS Graduate Search	google	form
			02/05/2024	SDS Graduate Search	google	form

Applicant data is considered Sensitive/Level 2 and may only be stored in approved locations. See <https://oneit.charlotte.edu/iso/guideline-data-handling> for more information.  
Pop-up blockers may interfere with reports or downloads. These will have to be allowed manually within your selected browser.

# Maximizing Running Communication Campaigns: *Overview*

- Slate is a **comprehensive platform** to execute our lead generation and communication strategy through **fully integrated communication channels**
- What is included in the communication campaigns?
  - Personalized Drip Email Campaigns
  - Scheduled Email Sends
  - SMS/Texting
  - Print Items - Postcards/mailers etc.



# Maximizing Running Communication Campaigns: *Project Kickoff*

- Communication campaign project kicked off in Spring 2022 with vendor partner



- Formed Graduate Admissions Communications Work Group
  - College communicators
  - Graduate recruiters
  - Unit + affiliate stakeholders (ISSO, SPS etc.)

# What communication campaigns are running?

	TARGET AUDIENCE	CALL-TO-ACTION
<b>APPLICATION GENERATION</b>	<ul style="list-style-type: none"><li>Prospects and inquiries</li></ul>	<ul style="list-style-type: none"><li>Start and complete their application</li></ul>
<b>YIELD</b>	<ul style="list-style-type: none"><li>Admitted graduate students</li></ul>	<ul style="list-style-type: none"><li>Submit their enrollment intention form</li></ul>
<b>ANTI-MELT</b>	<ul style="list-style-type: none"><li>Graduate students that accepted admissions offer</li></ul>	<ul style="list-style-type: none"><li>Encourage retention and engagement before program begins</li></ul>
<b>AUDIENCE-SPECIFIC</b>	<ol style="list-style-type: none"><li>UNC Charlotte Seniors</li><li>International Applicants</li></ol>	<ol style="list-style-type: none"><li>Consider pursuing graduate studies</li><li>Submit application/materials/payment</li></ol>

# Where can I find updates?

- How can I see the send dates for communications in my Google calendar?
  - Add the [“Graduate Admissions Marketing | Email, SMS and Print Calendar”](#) to your Google calendar using your @charlotte.edu account.
- All communication campaign launches are noted in GPDNet
  - GPD News/Resources > [Communications Toolkit](#)

The screenshot shows a Google Calendar interface for April 2024. The calendar is viewed in a monthly grid format. The days of the week are labeled at the top: SUN, MON, TUE, WED, THU, FRI, SAT. The dates are numbered from 1 to 30. The calendar is populated with various communication events, including emails, text messages, and application generation campaigns, all associated with the 'Graduate Admissions Marketing' calendar. The events are color-coded and include details such as 'Email #1 - International Applicant (Drip)', 'Text Message #2 - Anti-Mark', and 'Email #3A - Yield (Drip)'. The events are organized into groups for each week, with a 'System/App Messages' header for each week's events.

# Utilizing Slate Features to Nurture Contacts

## *Benefits*

- Reader Dashboard
- View highlights of application details
- View general student information
- List of prospective students
- Access Timeline Snapshot
- 1:1 Communications with Slate Contacts



# Utilizing Slate Features to Nurture Contacts

- Via the Graduate Program Portal
- View filtered results based off program, concentration, terms, admission decisions
- Clicking individual names leads to Reader Dashboard

Graduate Programs Portal

Help  
User Guide  
Reader

Dashboard Applications Prospects Events & Forms Reports Program Info

Search Name Search Email

Counseling (MA) Any Concentration Any Decision

Any Term

Any Site/Format Any Citizenship Any Bin Submitted Since Date

View Results Application Data Test Scores Schools References More

Note: The Graduate School communicates the official admission decision. If you want to send follow-up emails to admitted students using the Data Set download, the column "Grad Decision Release Date" must be populated with a date indicating we have "released" the decision to the applicant.

Next

Last	Preferred	Banner ID	Program	Conc.	Term	Format/Site	Current Bin	Decision	Citizenship
			Counseling (MA)	School	Summer 2024	On Campus	Admit	Admit	Dom
			Counseling (MA)	Clinical Mental Health	Fall 2023	On Campus	Withdraw Before Decision (I)		Dom
			Counseling (MA)	Clinical Mental Health	Summer 2023	On Campus	Admit	Admit/Accept	Dom
			Counseling (MA)	Clinical Mental Health	Summer 2023	On Campus	Withdraw Before Decision (I)		
			Counseling (MA)	Clinical Mental Health	Summer 2024	On Campus	Deny	Deny	Dom

# Utilizing Slate Features to Nurture Contacts

- Person tab:

- General Information
- Timeline Snapshot [Origin, Interactions, Messages]
- Applications

- Explore other tabs

including:

Schools, Test Scores,  
Funding, Enrollment

Slate ID: [REDACTED] App ID: [REDACTED] Banner ID: [REDACTED]  
Name: [REDACTED]

[Reader](#) [Lookup](#) [Send Message](#)

[Application](#) [Person](#) [Schools](#) [Test Scores](#) [Funding](#) [Enrollment](#)

[Biographical](#) [Contact](#) [Mailing Address](#)

**Origin**  
Form :: Request for Information :: 09/06/2022

**Interactions**  
09/06/2022:Source--Request for Information  
10/01/2022:Source--Application Created  
03/01/2023:Source--No Show: Admitted Student Information Session (03/08/2023 12:30 PM)

**Messages**  
03/28/2023 12:07: - (Views: 0)  
08/22/2023 12:13:Official Transcript - (Views: 5)  
08/15/2023 12:05:Official Transcript - (Views: 2)  
08/08/2023 12:09:Official Transcript - (Views: 3)  
05/18/2023 14:05:What to expect in your classes. - (Views: 1)  
05/17/2023 12:37: - (Views: 0)  
05/10/2023 14:08:Get involved at UNC Charlotte, {{Preferred}}. - (Views: 4)  
05/06/2023 14:01:How to make the most of your first semester. - (Views: 1)  
05/02/2023 12:01: - (Views: 0)  
04/27/2023 14:17:Start your grad school journey off right, {{Preferred}}. - (Views: 1)  
04/17/2023 14:03:{{Preferred}}, utilize the Thomas L. Reynolds Center for Graduate Life and Learning. - (Views: 1)  
04/13/2023 12:34: - (Views: 0)  
04/12/2023 12:11:Reminder: You can still get financial aid, {{Preferred}}. - (Views: 3)  
04/06/2023 12:10:Here's a glimpse of life as a UNC Charlotte grad student, {{Preferred}}. - (Views: 1)  
04/02/2023 12:07:Save the date, {{Preferred}}. - (Views: 1)  
03/21/2023 14:03:See how UNC Charlotte faculty describe the graduate education experience. - (Views: 3)  
03/16/2023 12:33: - (Views: 0)  
03/11/2023 12:00:{{Preferred}}, have you met the Graduate Admissions Ambassadors? - (Views: 1)

**Applications**  
Summer 2023 - Counseling (MA) - Clinical Mental Health (CNSL-MA) - Admit/Accept



# Utilizing Slate Features to Nurture Contacts

## Quick Links

- Reader - access application
- Lookup - student profile in Slate
- Send Message - direct 1:1 communication

Slate ID: [REDACTED] App ID: [REDACTED] Banner ID: [REDACTED]  
Name: [REDACTED]

Reader Lookup **Send Message**

Application Person Schools Test Scores Funding Enrollment

Biographical

Contact

Mailing Address

Slate ID: [REDACTED] App ID: [REDACTED] Banner ID: [REDACTED]  
Name: [REDACTED]

Sender: [REDACTED] Search Snippets...  
Recipient: Email Address: [REDACTED]  
CC: [REDACTED]  
Subject: [REDACTED]

Rich text editor toolbar: Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Link, Unlink, Text Color, Font, Size, Paragraph, Indent, Outdent, Undo, Redo, Source, Full Screen, Print, Refresh, Close.

Send Cancel

# Leveraging Event Management Tool

Slate has an event management system in that consolidates and simplifies the event planning, registration, and follow up process into a single, straightforward system.

## Benefits to hosting an event in Slate:

- Customizable event registration form
- Automated event specific communications
- Simplified check-in process (Virtual and In Person)
- Registration information is stored to the students profile on their Slate timeline



# Leveraging Event Management Tool

## Event Specific Communications with college specific branding

**Nov 2**  
Thu

### Educator Recruitment Open House

**When** Thu Nov 2, 2023 5pm – 6:30pm (EDT)  
**Where** Cato College of Education, 8838 Craver Road, Charlotte, NC 28223-0001, United States  
**Who** Unknown Organizer\*

[Add to calendar »](#)

### Agenda

Thu Nov 2, 2023

- 10am [Office Hours-Thursday](#)
- 5pm [College of Education Open House](#)
- 5pm [Educator Recruitment Open House](#)

No later events



Hi {{sys-first}},  
Thank you for attending the {{Form-Title}} hosted by the Cato College of Education at UNC Charlotte.

If you still have questions about our education programs, please reach out to the Education Recruiter, Jadah Nicholson at [jnich054@charlotte.edu](mailto:jnich054@charlotte.edu).

General information about Graduate School at UNC Charlotte can be found on the [Graduate Admissions website](#).

Cato College of Education

[Learn More](#) [Connect](#) [Apply](#) [Contact](#)

Thank you for registering for the on at . We look forward to sharing information about our programs with you soon.

At the time of the event, you can join the virtual session here: [Access Webinar](#)

If you have questions leading up to the event, please contact: [sswadmissions@charlotte.edu](mailto:sswadmissions@charlotte.edu).

We look forward to connecting with you soon!

**The School of Social Work**

[Learn More](#) [Connect](#) [Apply](#) [Contact](#)

9201 University City Blvd.,  
Charlotte, NC 28223  
[gradadmissions.charlotte.edu](http://gradadmissions.charlotte.edu)  
(704) 687-5503

[f](#) [i](#) [in](#) [v](#)



# Leveraging Event Management Tool

## Customizable Registration form



GRADUATE ADMISSIONS

Ellie Ivey Logout

### THINK ABOUT IT THURSDAY - EDUCATIONAL LEADERSHIP EDD

Thursday, September 28, 2023 at 12:00 PM until 1:00 PM Eastern Daylight Time

Ed.D. in Educational Leadership:

Higher Education Is it time to take the next step in your career? Learn more about pursuing a leadership position in school and district leadership, higher education, or educational research at our virtual open house! The "Think About It Thursday" sessions are designed to provide general information about graduate education in the Department of Educational Leadership. We will cover admissions requirements, deadlines, test requirements, and funding. Participants will have an opportunity to gain more insight about their specific program of interest.

First Name\*

Last Name\*

Email Address\*

Birthdate\*

Program of Interest\*

Anticipated Start Term\*

What are your goals in pursuing graduate education at this time? \*

## Automatic Check-in

Template [Program Event](#)  
Folder MSW  
User [Ellie Ivey](#)  
User 2 [Amy Peters](#)  
Status CONFIRMED  
Realm Inherited from template: Graduate Admissions  
Scope Person  
URL <https://gradapp.charlotte.edu/register/?id=fc2183c8-ef92-4e4f-bab7-8a30b612f275> [Edit URL](#)  
Documents [Edit Documents](#)  
Online [Connect](#)

- Edit Form
- Export Data
- Export PDF
- New Query
- New Report

Registrants (136) [Launch Check In](#)

Attendees: 109 No shows: 27

Registered	Cancelled	All Registrants	Search Registrants...		
Registrant	Payment Due	Status	Submitted ▲		
<a href="#">New Registration</a>					
Peterson, Madalyn Ann		Attended	02/16/2023		
Hamdan, Katia Grace		Attended	02/16/2023		
Talbert, Gavin Noah		Attended	02/16/2023		
Lowe, Skyla D		Attended	02/15/2023		
Stanley, Savannah		Attended	02/15/2023		
Weidner, Olivia Rae		Attended	02/15/2023		
Flessner, Clark		Attended	02/15/2023		
Spencer, Myshequa (Mya)		Attended	02/15/2023		
O'Dell, Alanie Danielle		Attended	02/15/2023		
Livingston, Marie Ann		Attended	02/15/2023		
Dupree, Carmen Marie		Attended	02/15/2023		
Leavitt, Emily Marie		Attended	02/14/2023		
Johnson, Jalen Alecia		Attended	02/14/2023		
Carter, LaDonna		Attended	02/14/2023		
May, Taylor Clinard		Attended	02/14/2023		
Pizarro, Juan Julio		Attended	02/14/2023		
Smith, Lazayrea Monae		Attended	02/14/2023		
Williams, Kaylen		No Show	02/14/2023		
Carter, Kiana		Attended	02/14/2023		



CHARLOTTE  
GRADUATE ADMISSIONS

# Leveraging Event Management Tool

## How Can You Host an Event in Slate?

- Complete a brief google form with event information
- Graduate Admissions will create the event in Slate
- Invite your prospective students to attend
- Login to Zoom and host your event!

The screenshot displays the Charlotte Graduate Admissions portal. At the top left is the Charlotte logo and the text 'GRADUATE ADMISSIONS'. On the right side, there are links for 'Ellie Ivey Logout', 'Help', 'User Guide', and 'Reader'. The main navigation bar includes 'Dashboard', 'Applications', 'Prospects', 'Events & Forms' (which is highlighted), 'Reports', and 'Program Info'. Below this, there are sub-sections for 'Events' and 'Campaign Contacts'. Under 'Events', there are radio buttons for 'Assigned Events', 'All Events', and 'Event ID'. A search form is present with a text input field containing 'application', and two date input fields labeled 'From Date' and 'To Date'. A 'Find Event(s)' button is located below the search form. At the bottom, there is a table with the following data:

Event	Date	Status	Desc.
Application Information Session with Graduate Programs	10/21/20	CONFIRMED	The Information Session is designed for prospective students starting an application and applicants

# Enhancing Search Capabilities



- **GRE Search Service**
- **National Name Exchange**
- **McNair Scholars**



*All names from searches will appear in the prospect tab in your Program Portal! The Recruitment team can help you connect with specific populations!*



Questions?

