Cal Poly CARNEGIE

The Power of Proximity

Location Based Event Marketing in Slate

May 2, 2025

Presenters

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Slate CRM Lead

Cal Poly

+ Fact 1
+ Fact 2

Casey Price

Slate Enrollment Implementation Strategist

Carnegie

+ Fact 1
+ Fact 2

The Proximity Principle

+ Closeness matters
+ Proximity boosts participation
+ Slate can drive this process

Give Students a Reason to Pause and Get Interested

Students are bombarded with messages. Make yours stand out. Even out of area schools can become relevant when students recognize a location near them.

+ Generic invitations get lost
+ Relevance = Interest
+ Personalization improves open rates
+ Stay out of junk and on calendars

Antonio, we've never been closer! Don't miss our next event near you, in Thousand Oaks, CA.

Students can tell when messaging isn't targeted.

More of your prospects likely live away from your event than near.

Slate's Built-In Functions

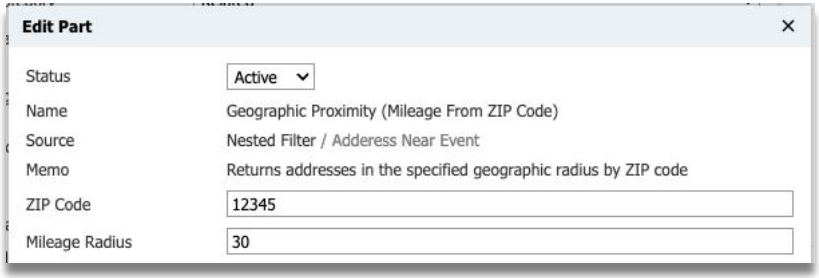
Slate has built in filters for location.

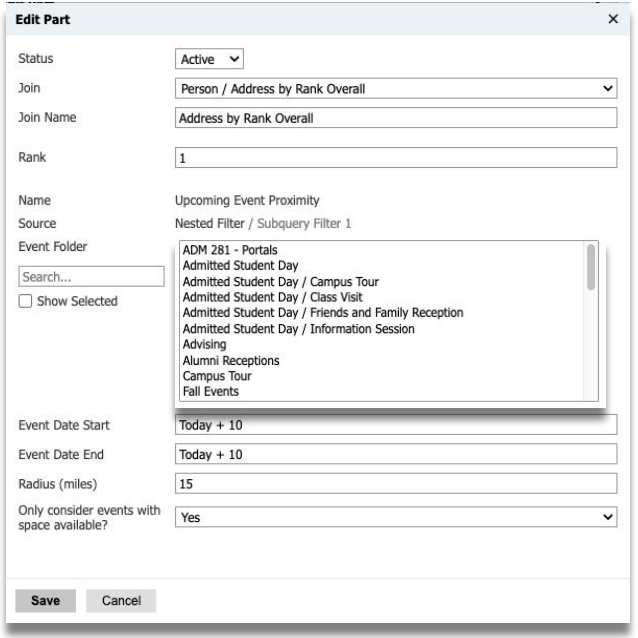
+ Slate Template Library - Local Base Filters
+ Filtering for Location, Event Dates and Schools.

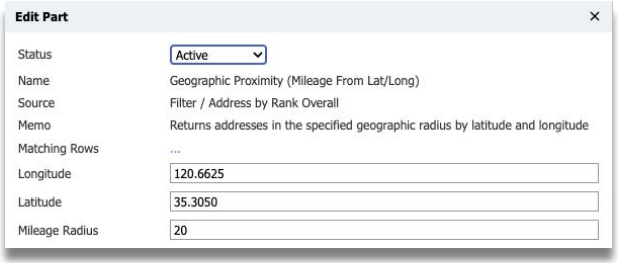
Upcoming Event Geographic Proximity	Returns all students who are within the specified radius of the selected event that falls within the time frame indicated
Upcoming Event Geographic Proximity by Template	Returns all students who are within the specified radius of the selected event that falls within the time frame indicated
Upcoming Nearby Event Proximity	Returns all students who are within the specified radius of the selected upcoming event by folder
Upcoming Related Event (School as Related Record)	Returns person records attending a school that is a related record for an event occurring between the selected dates

CJ Filters

Configurable Join Filters







Linked Event Records

Events you want to find need a precise location to be found.

+ Dataset Results
+ Other Results
+ Full Addresses with Address
+ Address with No Street

Event Name	Geo Exists	Latitude	Longitude
Street Addess Included, Unlinked	Yes	35.2981629	-120.6560075
No Street Address	No		
Dataset Record Linked	Yes	35.2981629	-120.6560075
Google API Location (Other Locations)	Yes	35.2981629	-120.6560075

Sample Event With a Linked Location

Date: Friday, May 2, 2025 Pacific Daylight Time UTC -07:00

Location:

California Polytechnic State University: San Luis Obispo
1 Grand Ave
Sn Luis Obisp, CA 93407-9000
United States
Edit Map Driving Directions

Sample Event Without a Linked Location

Date: Friday, May 2, 2025 Pacific Daylight Time UTC -07:00

Location:

Cal Poly Welcome Center
1 Grand Ave
San Luis Obispo, CA 93407-9000
United States
Edit Map Driving Directions

Google API Location (Other Locations)

Page Title: Sample Event with Google API Location

Date: Friday, May 2, 2025 Pacific Daylight Time UTC -07:00

Location:

Cal Poly Welcome Center
1 Grand Ave
San Luis Obispo, CA 93407-9000
United States
Edit Map Driving Directions

No Street Address

Page Title: Sample Event Without a Linked Location

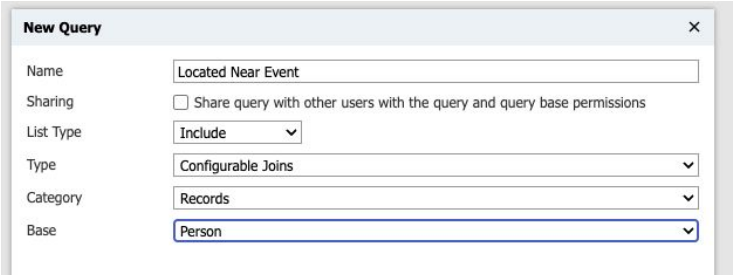
Date: Friday, May 2, 2025 Pacific Daylight Time UTC -07:00

Folder: Information Sessions

Deliver

Create a new Query for the Deliver mailing from the Person base. We are sending one message per person.

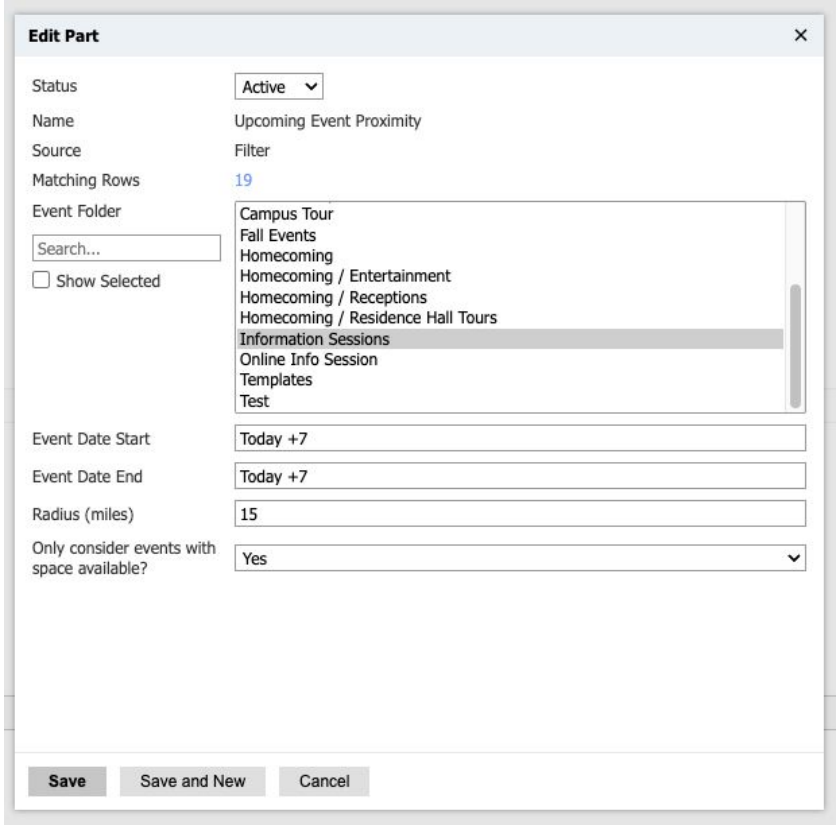
+ Starting on this base allows the send to be tied to the person who lives near an event.



Basic Query Filters

Select the events which fall in the correct Folder/Template, Start Date, End Date, Radius and if there is space available.

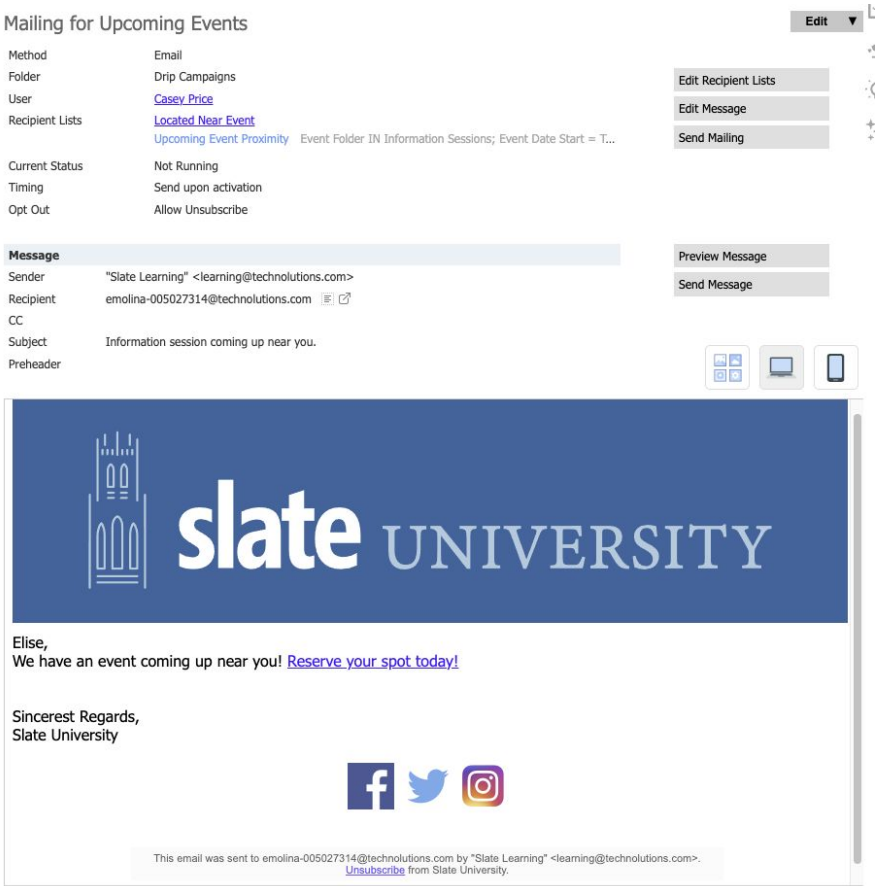
+ Depending on the filter used, the folder or template will matter.



Basic Email

Filtering on the Proximity allows us to show only the students who are within our set range of the event.

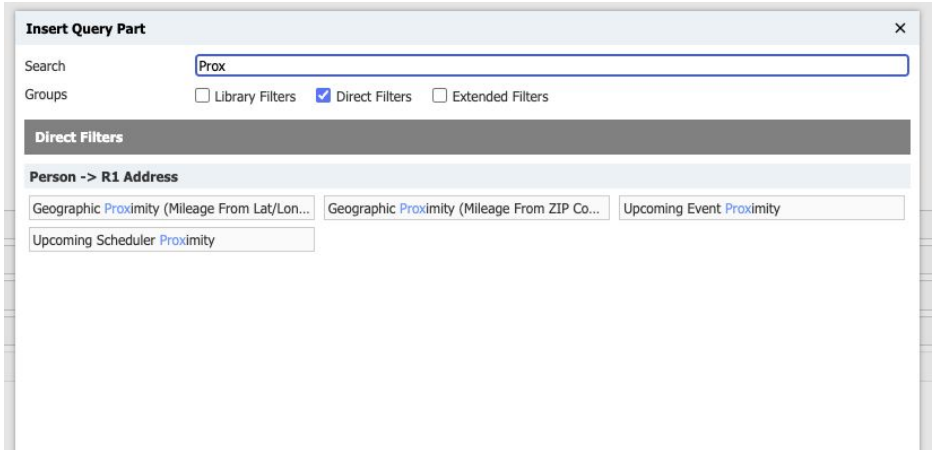
+ Will send whenever a student's address is within 15 miles of an Information Session 7 days in the future.
+ Emails all students within multiple event radius the same message.



Query Event Exports

Events exports can be added with some filters. The most basic is to export only the Person info and link the recipient to the Event Booking portal to select those nearest them.

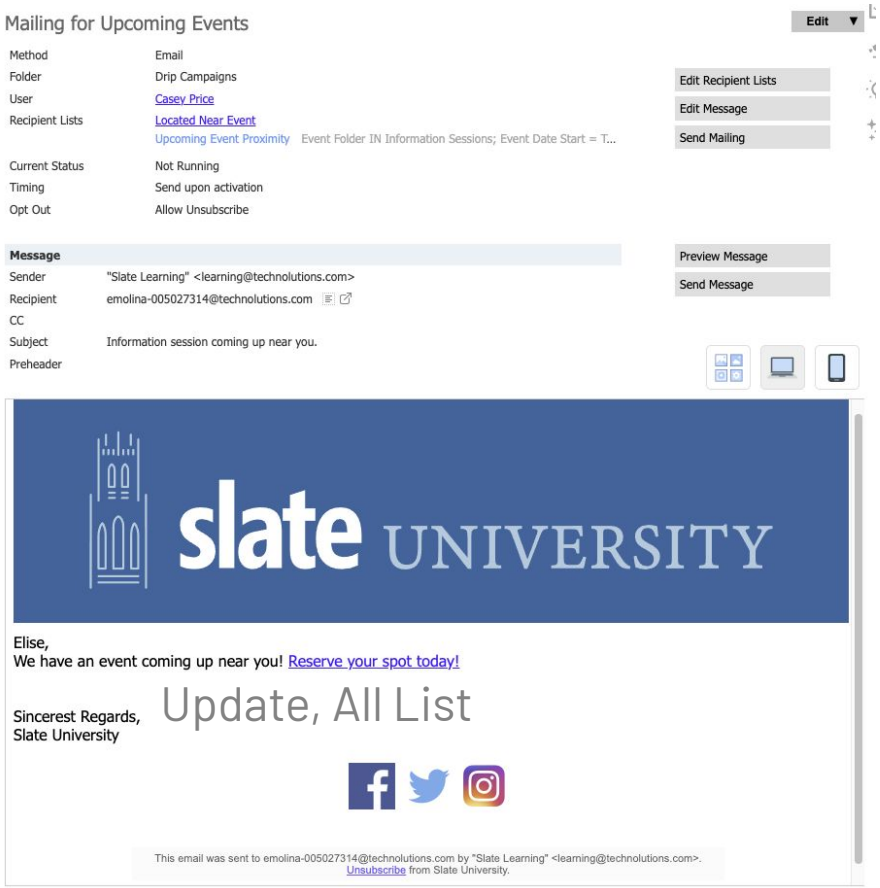
+ Filters looking for one event may have exports. Those looking for persons who live near any event could have many results. Sending the student to a portal allows them to select their own.
+ Filtering on additional criteria such as applicant status, person status, test, deceased, graduation year, or entry term as needed in order to better narrow down the population.



Export All Events in Mailing

Bringing in a Subquery to events and show all events from that day to all recipients.

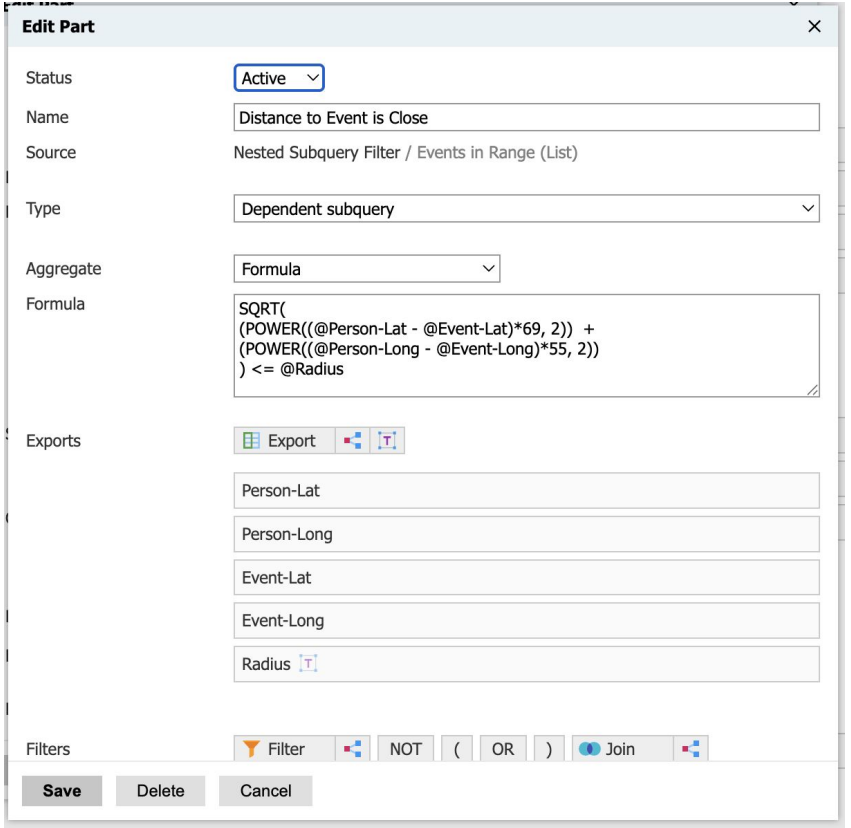
+ Shows all events to the viewer, those near and away.
+ A Dictionary Lookup with some Liquid Markup allows the list to be dynamic in length for each day.



Personalized Export

Export only the events which the filter connected as being connected.

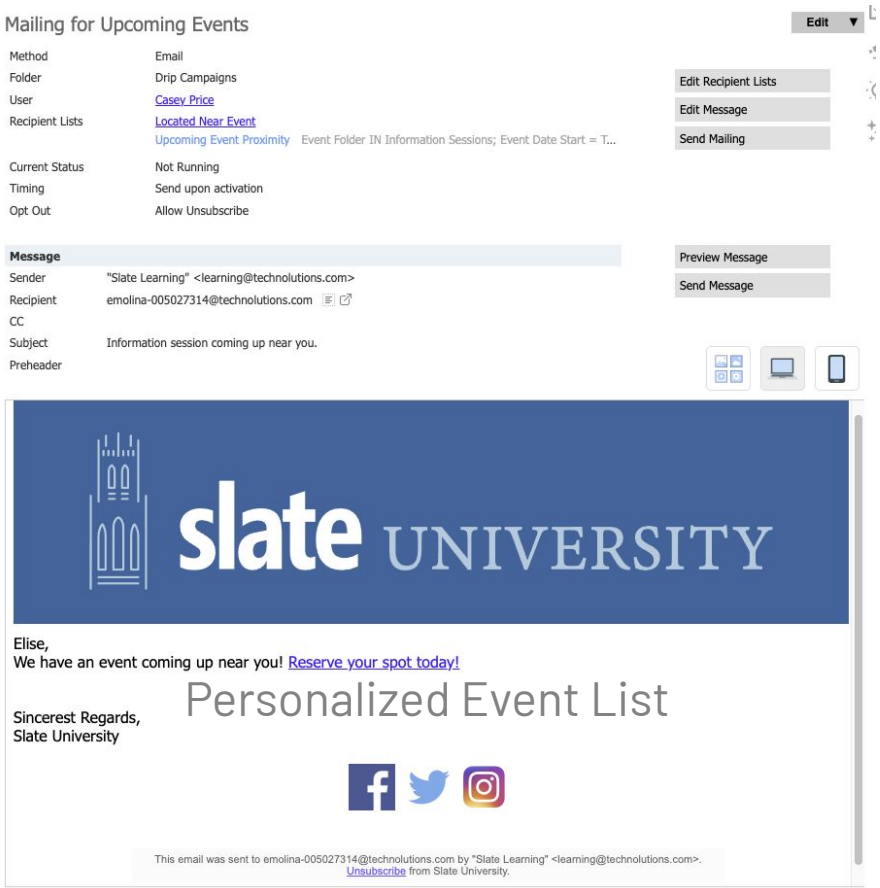
+ Basic functionality doesn't provide exporting custom data for each person. But additional formulas can help pinpoint the events which should show.
+ Join to person and event addresses, exporting Latitude and Longitude
+ Formula based on $a^2 + b^2 = c^2$ and finds the distance between two points on the map.
+ Additional math added to convert to miles
+ At these distances, the curvature of the earth does change the measurement slightly, but still within acceptable limits.
+ For the radius we set the distance one unit further to account for differences in the method.



Personalized Email

Each message will be personalized to each person, only showing events within their range in the email.

+ Basic functionality doesn't provide exporting custom data for each person. But additional formulas can help pinpoint the events which should show.



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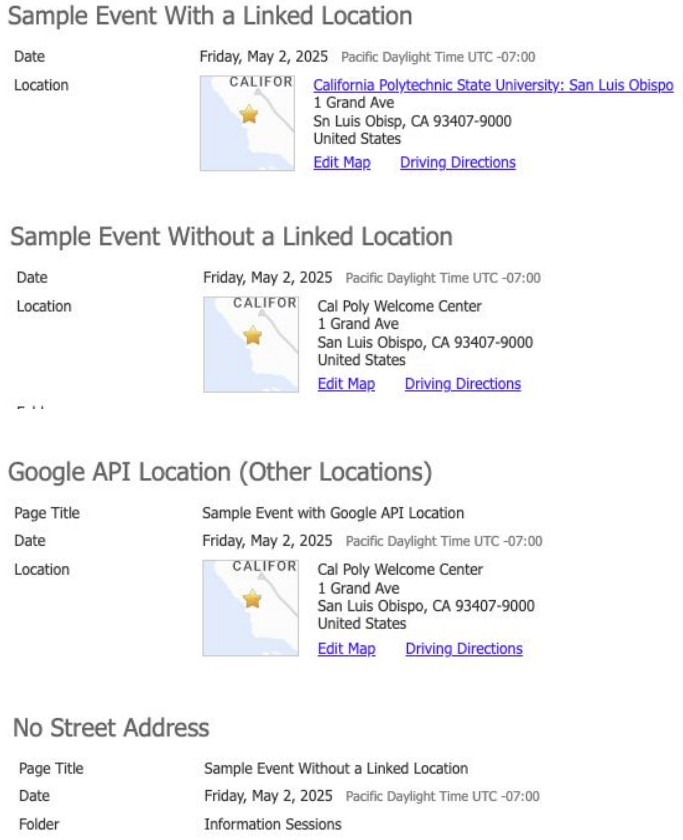
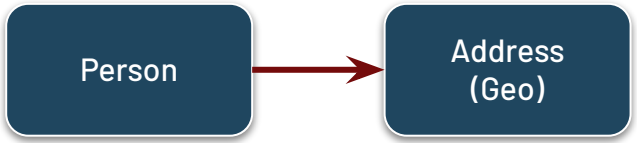


How Slate Stores Locations

Slate needs a connection to a Dataset record in order to access the GEO data for an address Lat/Long.

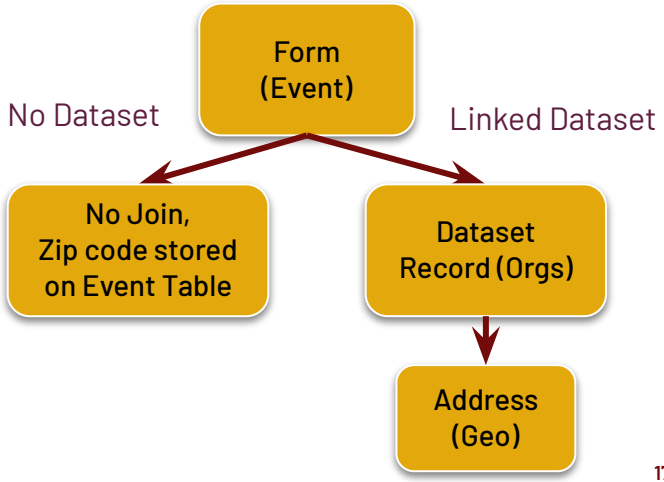
Person Locations

+ Come from the Address Table
+ Address table has detailed location data stored as a "Geo" data type and holds latitude and longitude data from the street address.
+ Pinpoints the front door of the address.



Event Locations

+ If linked to a Dataset record, looks at that records address table entry.
+ If no dataset record, pulls data from Google Places, stores address on forms table.
+ Uses center of zip code to show location.



Beyond Admissions

1. Alumni Mixers and Socials
2. Athletic Recruitment
3. HR Career Fairs
4. Branch Campus Targeting by Radius
5. Fundraisers

Thank You!

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