



CAL POLY

CARNEGIE

The Power of Proximity

Location Based Event Marketing in Slate

May 2, 2025



Presenters



Alaina Torres Norman

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

Edit Part ✕
Status: Active ▼
Name: Geographic Proximity (Mileage From ZIP Code)
Source: Nested Filter / Address Near Event
Memo: Returns addresses in the specified geographic radius by ZIP code
ZIP Code: 12345
Mileage Radius: 30

Edit Part ✕
Status: Active ▼
Join: Person / Address by Rank Overall ▼
Join Name: Address by Rank Overall
Rank: 1
Name: Upcoming Event Proximity
Source: Nested Filter / Subquery Filter 1
Event Folder:

 Show Selected
ADM 281 - Portals
Admitted Student Day
Admitted Student Day / Campus Tour
Admitted Student Day / Class Visit
Admitted Student Day / Friends and Family Reception
Admitted Student Day / Information Session
Advising
Alumni Receptions
Campus Tour
Fall Events
Event Date Start: Today + 10
Event Date End: Today + 10
Radius (miles): 15
Only consider events with space available?: Yes ▼
Save **Cancel**

Edit Part ✕
Status: Active ▼
Name: Geographic Proximity (Mileage From Lat/Long)
Source: Filter / Address by Rank Overall
Memo: Returns addresses in the specified geographic radius by latitude and longitude
Matching Rows: ...
Longitude: 120.6625
Latitude: 35.3050
Mileage Radius: 20

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 Address 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
 San Luis Obispo, 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

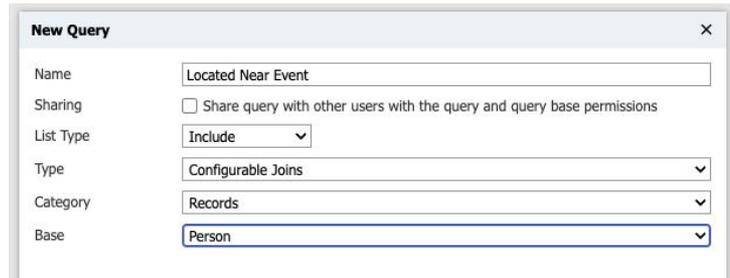
Date Friday, May 2, 2025 Pacific Daylight Time UTC -07:00

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.



The screenshot shows a 'New Query' dialog box with the following configuration:

Name	Located Near Event
Sharing	<input type="checkbox"/> Share query with other users with the query and query base permissions
List Type	Include
Type	Configurable Joins
Category	Records
Base	Person

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.

Edit Part
✕

Status	Active ▾
Name	Upcoming Event Proximity
Source	Filter
Matching Rows	19
Event Folder	<div style="border: 1px solid #ccc; padding: 5px;"> <input type="text" value="Search..."/> </div> <input type="checkbox"/> Show Selected <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <ul style="list-style-type: none"> Campus Tour Fall Events Homecoming Homecoming / Entertainment Homecoming / Receptions Homecoming / Residence Hall Tours <li style="background-color: #f0f0f0;">Information Sessions Online Info Session Templates Test </div>
Event Date Start	Today +7
Event Date End	Today +7
Radius (miles)	15
Only consider events with space available?	Yes ▾

Save
Save and New
Cancel

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.

Mailing for Upcoming Events

Method	Email
Folder	Drip Campaigns
User	Casey Price
Recipient Lists	Located Near Event Upcoming Event Proximity Event Folder IN Information Sessions; Event Date Start = T...
Current Status	Not Running
Timing	Send upon activation
Opt Out	Allow Unsubscribe

Edit

Edit Recipient Lists

Edit Message

Send Mailing

Message

Sender "Slate Learning" <learning@technolutions.com>
 Recipient emolina-005027314@technolutions.com
 CC
 Subject Information session coming up near you.
 Preheader

Preview Message

Send Message



Elise,
 We have an event coming up near you! [Reserve your spot today!](#)

Sincerest Regards,
 Slate University

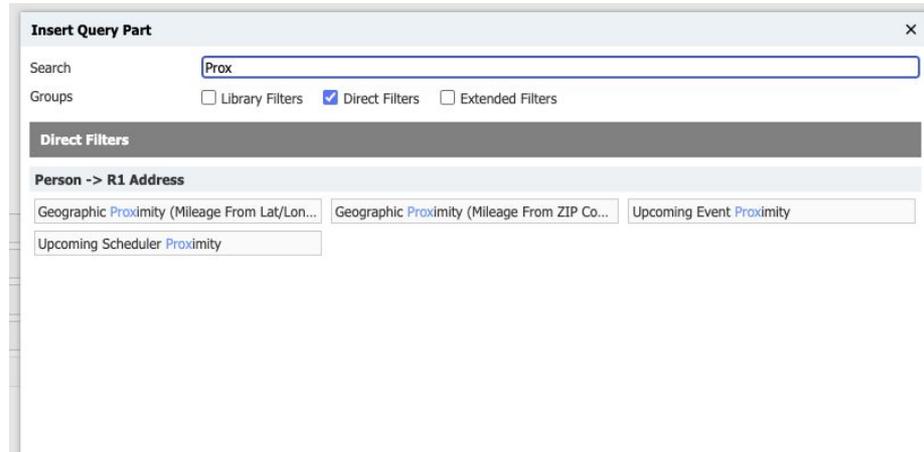


This email was sent to emolina-005027314@technolutions.com by "Slate Learning" <learning@technolutions.com>. [Unsubscribe](#) from Slate University.

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.



The screenshot shows a dialog box titled "Insert Query Part" with a search bar containing "Prox". Below the search bar, there are three radio button options: "Library Filters" (unchecked), "Direct Filters" (checked), and "Extended Filters" (unchecked). Under the "Direct Filters" section, there is a sub-section titled "Person -> R1 Address" which contains four filter options: "Geographic Proximity (Mileage From Lat/Lon...", "Geographic Proximity (Mileage From ZIP Co...", "Upcoming Event Proximity", and "Upcoming Scheduler Proximity".

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.

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Current Status	Not Running
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Edit

Edit Recipient Lists

Edit Message

Send Mailing

Preview Message

Send Message

Message

Sender "Slate Learning" <learning@technolutions.com>
 Recipient emolina-005027314@technolutions.com
 CC
 Subject Information session coming up near you.
 Preheader



Elise,
 We have an event coming up near you! [Reserve your spot today!](#)

Sincerest Regards,
 Slate University

Update, All List

[Facebook](#) [Twitter](#) [Instagram](#)

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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.

Edit Part
✕

Status Active ▾

Name Distance to Event is Close

Source Nested Subquery Filter / Events in Range (List)

Type Dependent subquery ▾

Aggregate Formula ▾

Formula

```
SQRT(
(POWER((@Person-Lat - @Event-Lat)*69, 2)) +
(POWER((@Person-Long - @Event-Long)*55, 2))
) <= @Radius
```

Exports
📄 Export
⚙️
🔍

Person-Lat

Person-Long

Event-Lat

Event-Long

Radius

Filters
🔍 Filter
⚙️
NOT
(
OR
)
🔗 Join
⚙️

Save
Delete
Cancel

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.

Mailing for Upcoming Events

Method	Email
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User	Casey Price
Recipient Lists	Located Near Event Upcoming Event Proximity Event Folder IN Information Sessions; Event Date Start = T...
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Edit

Edit Recipient Lists

Edit Message

Send Mailing

Message

Sender "Slate Learning" <learning@technolutions.com>
 Recipient emolina-005027314@technolutions.com  
 CC
 Subject Information session coming up near you.
 Preheader

Preview Message

Send Message




slate UNIVERSITY

Elise,
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Personalized Event List

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 Slate University





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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

How Slate Stores Locations

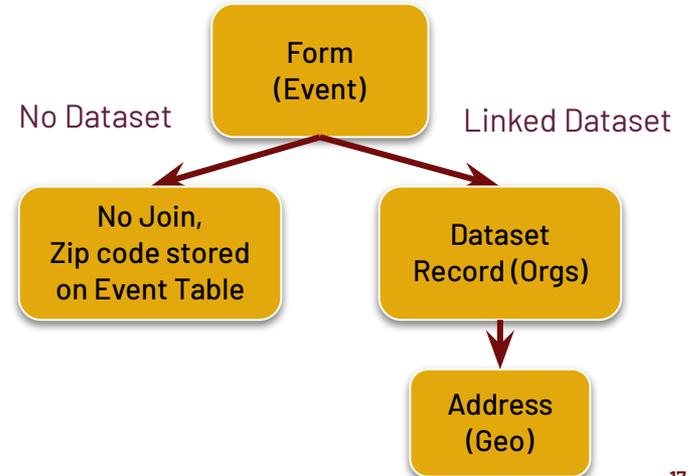
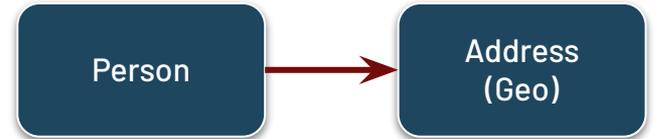
Slate needs a connection to a Dataset record in order to access the GEO data for an address Lat/Long.

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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