Your New Hub for *Enrollment Data*

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Today's Presenters

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THE
Carnegie
Conference

Today's Agenda

Enrollment Dashboards Overview

Decision Making with Dashboards

Starting Your Dashboard Journey

Have you ever...

Let's have a cathartic moment (or three).

...struggled with permissions in Slate Reports?

Very popular topic in the Slate Forum and Feedback in 2025.

...had a Slate Report time-out on you?

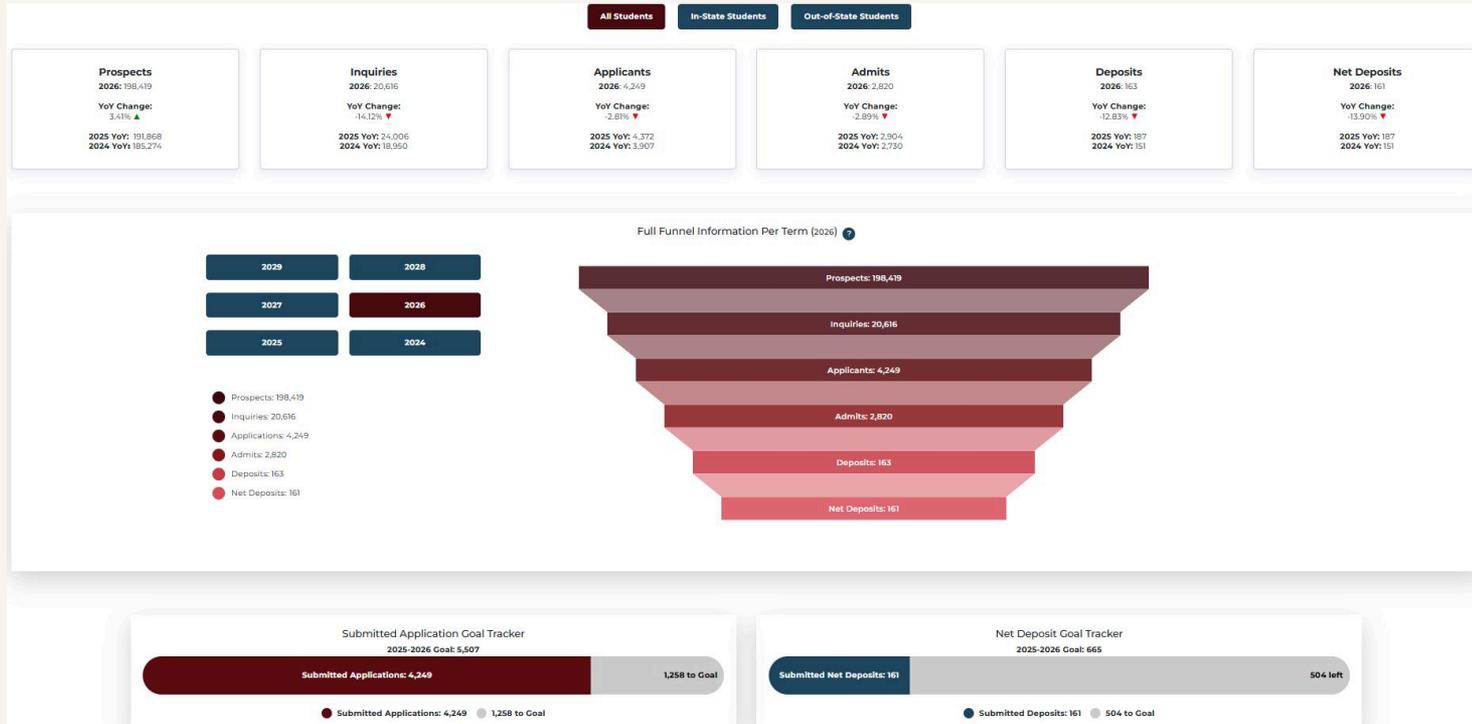Very popular topic in the Slate Forum and Feedback since...forever?
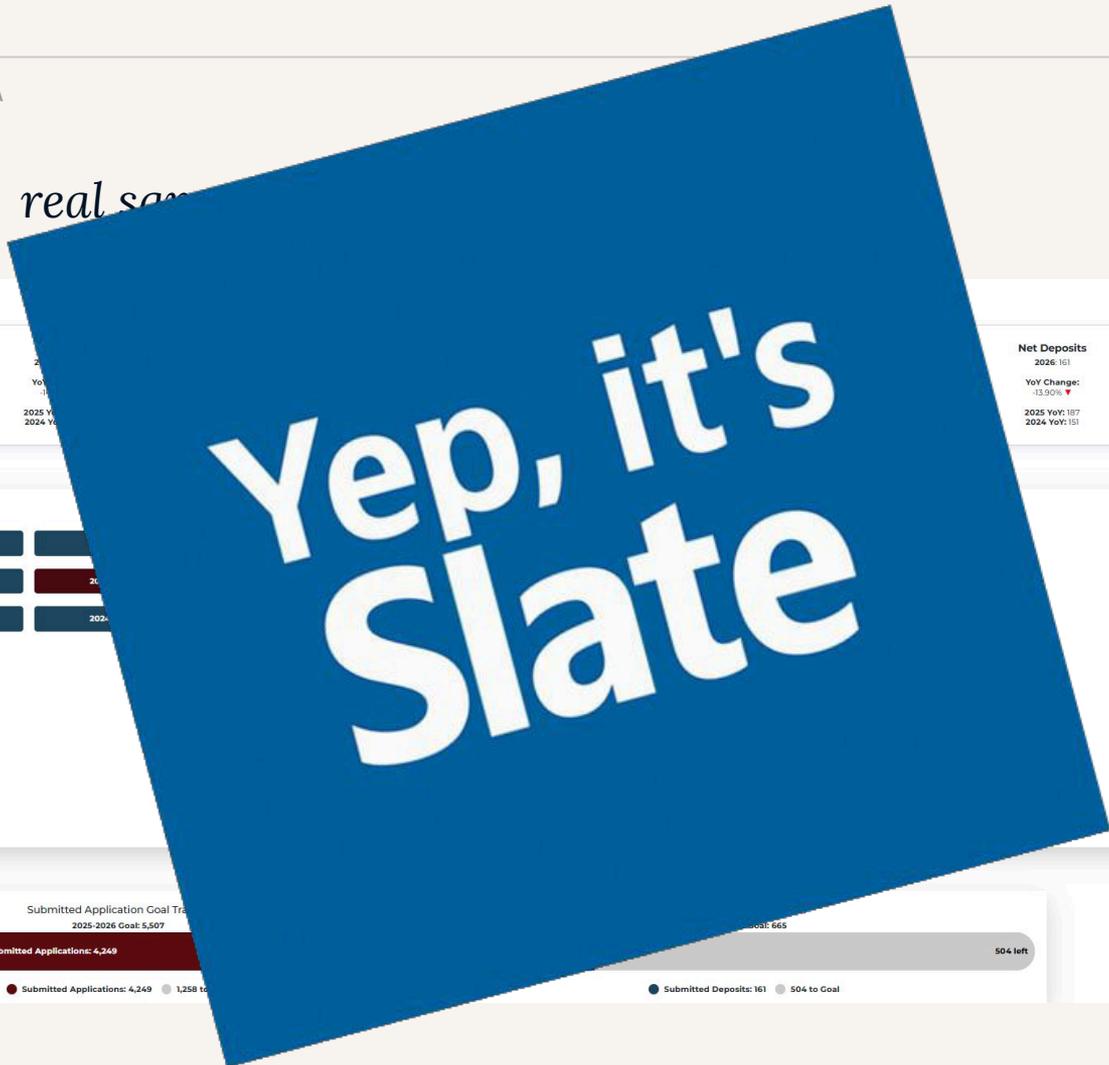
...used one Slate module to improve another?

We love a creative solution.

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Enrollment Dashboards Overview

Let's look at a *real sample.*

Let's look at a *real sa*

Prospects
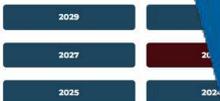**2026:** 198,419

YoY Change:
3.41% ▲

2025 YoY: 191,868
2024 YoY: 185,274

Net Deposits
2026: 161

YoY Change:
-13.90% ▼

2025 YoY: 187
2024 YoY: 151

2029

2027

2025

2024

● Prospects: 198,419
● Inquiries: 20,616
● Applications: 4,249
● Admits: 2,820
● Deposits: 163
● Net Deposits: 161

Submitted Application Goal Tra
2025-2026 Goal: 5,507

Submitted Applications: 4,249

Goal: 665

504 left

● Submitted Applications: 4,249   ● 1,258 to   ● Submitted Deposits: 161   ● 504 to Goal

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Decision Making with Dashboards

What can you *do* with an Enrollment Dashboard?

Serves as a **central hub** for real-time enrollment data insights ★

Allow non-Slate users to view data in real time—no more emailing Reports out of Slate directly! ★

Goes **beyond standard Slate reporting** with deeper analytics and visuals

Tracks engagement across the entire inquiry-to-enrollment journey

Visualizes funnels to show where prospects advance or drop off

Monitors performance of campaigns, staff, and channels in one place

Provides **instant access to clean, dependable data**—no time-outs! ★

Helps teams **identify trends and bottlenecks** early in the cycle

Supports **data-informed decisions** to improve outreach and follow-up ★

Enables **faster adjustments** to communications strategies

Drives conversions by connecting activity metrics with outcomes

Promotes collaboration between marketing, admissions, and leadership

Reduces reliance on manual reports and ad-hoc data pulls

Insights + Impact:
Case Studies

Institution #1:

A team member who wasn't granted Reports permission noticed how well students were responding to non-templated emails. This alerted the team to a strong correlation between non-templated emails and conversions.

Resulted in utilizing non-templated emails as drivers for ad-hocs.

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Insights + Impact:
Case Studies

Institution #2:

Noticed trends that some specific formatting for scholarship and financial aid messaging was more successful in terms of both email engagement and student conversion.

Resulted in using similar formats of messaging for ad-hocs. For example, the school recreated their scholarship matrix in an email.

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Insights + Impact:
Case Studies

Institution #3:

The dashboard reports indicated low deliverability and a 0.09% click rate. Through additional querying, it was determined a lot of students utilized school email addresses, in a state with strict privacy laws.

This resulted in:

+ **Adding 'Please use a personal email' to all of their RFI forms.**

+ **A filter on mailings to exclude bounces earlier than Slate's internal suppression list to emails.**

+ **Increased average click rate to 0.22%**

Starting Your
Dashboard *Journey*

Portal Components
Organizing Your Data

Components of the Portal:
- **Methods** - One per campaign or page
- **Views** - One per campaign or page
- **Queries** - Materialized View Queries
  - 2 - 3 queries per campaign or page
- **Reports** - One per campaign or page

Materialized View Queries
- **Static, point-in-time snapshot**
- Formula and calculation heavy
- More efficient in this context
- Create Query Library for even more efficiency

Queries

New Query ⚡

Name
01: Senior Search Counts
01: Senior Search Results
02: Senior App Search (Prospects & Inquiries) Counts
02: Senior App Search (Prospects & Inquiries) Results
03: App Gen Counts
03: App Gen Results
04a: Awaiting Submission Counts
04a: Awaiting Submission Results
04b: Awaiting Materials Count
04b: Awaiting Materials Results
05: Yield Counts
05: Yield Results
06: Anti-Melt Counts
06: Anti-Melt Results

Materialized View Queries
Rendering Email Metrics

Senior Search Campaign ❓

Totals	Total Mailings Received	Total Opens	Total Clicks	Average Open Rate	Average Click Rate	Average Click Thru Rate	Dart Info
	1,727,627	264,145	1,160	15.29%	0.07%	0.44%	

Mailing Name	Total	Opens	Clicks	Open Rate	Click Rate	Click Thru Rate	
#01 Senior Search - Overview	163,246	23,403	177	14.34%	0.11%	0.76%	View Dart Information

Segment	Opens	Clicks	Open Rate	Click Rate	Click Thru Rate
Dart 1:	7,557	54	14.53%	0.10%	0.71%
Dart 2:	2,044	18	14.75%	0.13%	0.88%
Dart 3:	11,336	85	14.44%	0.11%	0.75%
No Dart:	2,462	20	13.03%	0.11%	0.81%

Mailing Name	Total	Opens	Clicks	Open Rate	Click Rate	Click Thru Rate	
#02 Senior Search (Darts) - Financial-Aid	161,097	23,217	302	14.41%	0.19%	1.30%	View Dart Information
#03 Senior Search - Visit	157,469	40,252	250	25.56%	0.16%	0.62%	View Dart Information

Materialized View Queries
Rendering Email Metrics - Query 1

Senior Search Campaign ❓						
Totals	**Total Mailings Received**	**Total Opens**	**Total Clicks**	**Average Open Rate**	**Average Click Rate**	**Average Click Thru Rate**
	1,727,627	264,145	1,160	15.29%	0.07%	0.44%
Mailing Name	**Total**	**Opens**	**Clicks**	**Open Rate**	**Click Rate**	**Click Thru Rate**

Exports

total_total	Count
opens_total	Count
clicks_total	Count
open_rate_total	Formula concat(cast(@open*100.0/@total as decimal(16,2)), '%')
click_rate_total	Formula concat(cast(@click*100.0/@total as decimal(16,2)), '%')
clicks_thru_rate_total	Formula concat(cast(@click*100.0/@open as decimal(16,2)), '%')

Filters   Query Profiler   Matching Rows: 1

Materialized View Queries
Rendering Email Metrics - Query 2

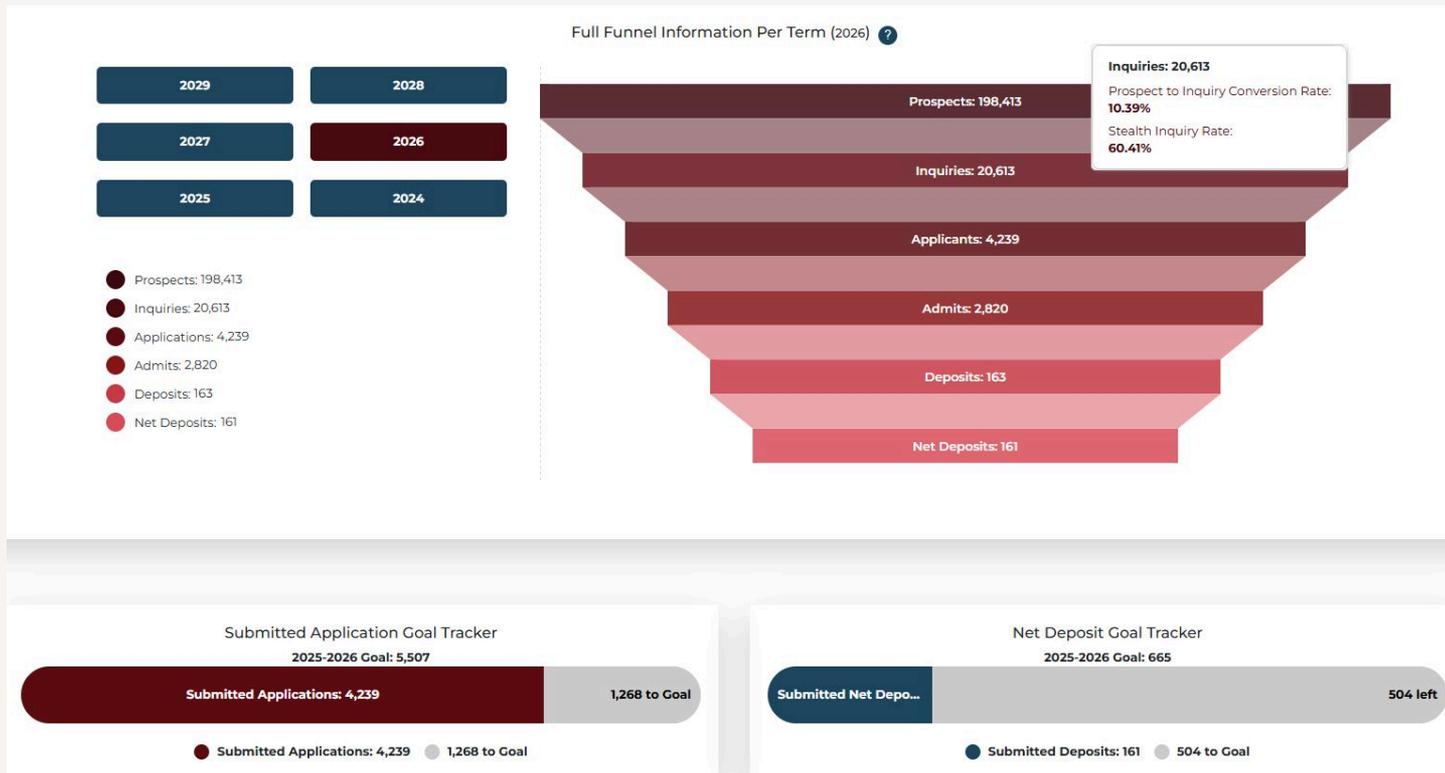| Mailing Name	Total	Opens	Clicks	Open Rate
#01 Senior Search - Overview	163,246	23,403	177	14.34%
#02 Senior Search (Darts) - Financial-Aid	161,097	23,217	302	14.41%
#03 Senior Search - Visit	157,469	40,252	250	25.56%
#04 Senior Search - Academics	148,879	20,402	109	13.70%

Exports

message_guid

Name   Concatenate   Row

Total   Count

Opens   Count

Clicks   Count

Open_Rate   Formula   conc

Materialized View Queries *Funnel + Goals*

Full Funnel Information Per Term (2026) ❓

2029	2028
2027	**2026**
2025	2024

● Prospects: 198,413
● Inquiries: 20,613
● Applications: 4,239
● Admits: 2,820
● Deposits: 163
● Net Deposits: 161

Prospects: 198,413
Inquiries: 20,613
Applicants: 4,239
Admits: 2,820
Deposits: 163
Net Deposits: 161

Inquiries: 20,613
Prospect to Inquiry Conversion Rate: **10.39%**
Stealth Inquiry Rate: **60.41%**

Submitted Application Goal Tracker
2025-2026 Goal: 5,507

Submitted Applications: 4,239 | 1,268 to Goal

● Submitted Applications: 4,239 ● 1,268 to Goal

Net Deposit Goal Tracker
2025-2026 Goal: 665

Submitted Net Depo... | 504 left

● Submitted Deposits: 161 ● 504 to Goal

Materialized View Queries *Funnel + Goals*

Exports

current_year [T]	2026
prior_year [T]	2025
prior_prior_year [T]	2024
junior [T]	2027
sophomore [T]	2028
freshman [T]	2029
app_goal [T]	5507
deposit_goal [T]	723
net_deposit_goal [T]	665

prospects_current_year	Count
prospects_prior_year	Count
prospects_prior_prior_year	Count
inquiries_current_year	Count
stealth_inquiries_current_year	Count
stealth_inquiries_prior_year	Count
stealth_inquiries_prior_prior_year	Count
inquiries_prior_year	Count
inquiries_prior_prior_year	Count
applicants_current_year	Count

applicants_prior_year	Count
applicants_prior_prior_year	Count
admits_current_year	Count
admits_prior_year	Count
admits_prior_prior_year	Count
deposits_current_year	Count
deposits_prior_year	Count
deposits_prior_prior_year	Count
net_deposits_current_year	Count
net_deposits_prior_year	Count

junior_prospects	Count
junior_inquiries	Count
sophomore_prospects	Count
sophomore_inquiries	Count
freshman_prospects	Count
freshman_inquiries	Count

Materialized View Queries *Funnel + Goals*

Custom SQL

```sql
28   format(try_convert(int, applicants_current_year), '#,##0') as [applicants_current_year],
29   format(try_convert(int, applicants_prior_year), '#,##0') as [applicants_prior_year],
30   format(try_convert(int, applicants_prior_prior_year), '#,##0') as [applicants_prior_prior_year],
31   format(try_convert(int, admits_current_year), '#,##0') as [admits_current_year],
32   format(try_convert(int, admits_prior_year), '#,##0') as [admits_prior_year],
33   format(try_convert(int, admits_prior_prior_year), '#,##0') as [admits_prior_prior_year],
34   format(try_convert(int, deposits_current_year), '#,##0') as [deposits_current_year],
35   format(try_convert(int, deposits_prior_year), '#,##0') as [deposits_prior_year],
36   format(try_convert(int, deposits_prior_prior_year), '#,##0') as [deposits_prior_prior_year],
37   format(try_convert(int, net_deposits_current_year), '#,##0') as [net_deposits_current_year],
38   format(try_convert(int, net_deposits_prior_year), '#,##0') as [net_deposits_prior_year],
39   format(try_convert(int, net_deposits_prior_prior_year), '#,##0') as [net_deposits_prior_prior_year],
40   junior_prospects as [junior_prospects],
41   junior_inquiries as [junior_inquiries],
42   sophomore_prospects as [sophomore_prospects],
43   sophomore_inquiries as [sophomore_inquiries],
44   freshman_prospects as [freshman_prospects],
45   freshman_inquiries as [freshman_inquiries],
46
47   CONCAT(CAST((inquiries_current_year) * 100.0 / NULLIF(prospects_current_year, 0) AS DECIMAL(16,2)), '%') as[current_year_pro_inq],
48   CONCAT(CAST((stealth_inquiries_current_year * 100.0) / NULLIF(inquiries_current_year, 0) AS DECIMAL(16,2)), '%') as [current_year_stealth_inq],
49   CONCAT(CAST((applicants_current_year) * 100.0 / NULLIF(prospects_current_year, 0) AS DECIMAL(16,2)), '%') as[current_year_pro_app],
50   CONCAT(CAST((applicants_current_year) * 100.0 / NULLIF(inquiries_current_year, 0) AS DECIMAL(16,2)), '%') as[current_year_inq_app],
51   CONCAT(CAST((admits_current_year) * 100.0 / NULLIF(applicants_current_year, 0) AS DECIMAL(16,2)), '%') as[current_year_app_adm],
52   CONCAT(CAST((deposits_current_year) * 100.0 / NULLIF(admits_current_year, 0) AS DECIMAL(16,2)), '%') as[current_year_adm_dep],
53   CONCAT(CAST((deposits_current_year - net_deposits_current_year) * 100.0 / NULLIF(deposits_current_year, 0) AS DECIMAL(16,2)), '%') as [current_year_dep_net],
54   CONCAT(CAST((inquiries_prior_year) * 100.0 / NULLIF(prospects_prior_year, 0) AS DECIMAL(16,2)), '%') as[prior_year_pro_inq],
55   CONCAT(CAST((stealth_inquiries_prior_year * 100.0) / NULLIF(inquiries_prior_year, 0) AS DECIMAL(16,2)), '%') as [prior_year_stealth_inq],
```

Save   Parse

Resources

[Knowledge Base: Materialized Views](#)

[Knowledge Base: Portals Overview](#)

[Knowledge Base: Data Explorer](#)

Thank you.

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