Conference Insights Engine

Slate Summit 2026

Companion Workbook



The Innovation Forge

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A practical worksheet packet for turning Summit ideas into governed practice.

How To Use This Workbook

Purpose

This workbook turns the Conference Insights Engine chapters into practical worksheets, exercises, and planning templates.

Use one resource at a time. Finish it with an owner, a review date, and a clear next action.

Resource Map

Resource	Use When
Decision Infrastructure Worksheet	A build needs to prove which decision it supports.
Query Ladder Worksheet	A query needs clearer row grain, base logic, or review rules.
Signal To Action Matrix	A signal may guide outreach, staff action, or measurement.
Communications Governance Map	A campaign family needs audience logic, suppressions, tests, and owners.
One Event Signal Worksheet	An event or portal experience should create a reviewable signal loop.
Hidden Operating System Brief	A rule, workflow, permission group, or old object needs visible care.
Slate Teaching Brief	A working build now needs training, transfer, and maintenance support.
Practitioner Stack Self Assessment	A staff member needs one skill focus and one proof artifact.
Summit Adoption Model	A learning cycle needs one month of practical team action.

Suggested Workshop Flow

No	Step
1	Start with the Decision Infrastructure Worksheet.
2	Add the Query Ladder Worksheet if the work depends on query logic.
3	Add the Signal To Action Matrix if the work changes outreach or staff action.
4	Add the Communications Governance Map if the work affects messaging.
5	Add the Hidden Operating System Brief if the work depends on older logic.

No	Step
6	Finish with the Slate Teaching Brief so the work can be explained and maintained.

Completion Standard

A worksheet is ready when another person can answer four questions.

No	Question
1	What decision, process, or skill does this resource support?
2	Who owns the next action?
3	What evidence or logic does the resource make visible?
4	When should the result be reviewed?

Decision Infrastructure Worksheet

Chapter 1 companion resource

Purpose

Use this worksheet to test whether a Slate build supports a real decision. The build can be a report, dashboard, campaign, portal, model, Querybase View, source structure, workflow, event follow up process, or governance routine.

The standard is simple. A useful build should clarify a decision, surface evidence, guide action, and support review.

Basic Information

Build name	
Build type	
Current owner	
Technical owner	
Decision owner	
Audience affected	
Date completed	
Review date	

Five Question Test

What decision does this support?

Write the decision in plain language.

This build helps us decide whether	
This build helps us decide which	
This build helps us decide when	

Who owns that decision?

Name the person or role that decides how the output should be used.

Decision owner	
Backup owner	
Who needs to be consulted before major changes	

What evidence does the build surface?

List the evidence the build uses or displays.

Evidence source one	
Evidence source two	
Evidence source three	
Evidence source four	
What this evidence can show	
What this evidence leaves unclear	
Known data quality issues	

What action should change because of it?

Write one action rule.

When this appears	
This owner does	
Within this timing	
Through this channel or process	
With these exceptions	

How will we know if it is working?

Define the review signal.

Success measure	
Review cadence	
Where the review happens	
Who reviews the result	
What would cause the team to revise the build	

Decision Sentence

Finish one sentence that could appear in documentation.

This build helps us decide	
The decision matters because	
The action changes when	
The result should be reviewed	

Risk Check

Use short answers.

What could someone misunderstand	
What assumption is hidden	
What happens if the build breaks	
What happens if the data is stale	

Who should be informed before changes	

Meeting Exercise

Time needed: twenty minutes.

No	Step
1	Choose one active build.
2	Have each person write the decision sentence alone.
3	Compare the answers.
4	If the answers differ, name the unclear part.
5	Rewrite the decision sentence together.
6	Assign one owner and one review date.

Completion Standard

This worksheet is complete when the team can name the decision, owner, evidence, action, measure, and review date without asking the original builder to translate the work.

Query Ladder Worksheet

Chapter 2 companion resource

Purpose

Use this worksheet to review one important query. Choose a query that drives a message, dashboard, report, rule, portal, model, checklist, bin, export, or leadership discussion.

The goal is to make query logic explainable.

Query Profile

Query name	
Query purpose	
Where it is used	
Current owner	
Technical reviewer	
Last reviewed	
Next review date	

Rung 1: The Question

Write the question before looking at the query build.

The query is meant to answer	
The population is	
The cycle, term, or time window is	
The output is used for	
What words need definition	

Rung 2: Row Grain

What should one row represent?

Choose one primary row meaning.

No	Step
1	One person.
2	One application.
3	One decision.
4	One event registration.
5	One interaction.
6	One material.
7	Another unit.

Write the row grain sentence.

One row represents	
The base was chosen because	
The query should avoid counting	

Rung 3: Bases And Direct Paths

Current base	
Why this base fits the question	
Main joins used	
Join labels that need clearer names	
Direct paths used	
Places where the query takes a longer path	
Fields that need definition	

Rung 4: Many Related Rows

Where can one record have many related records?

Related row area one	
Related row area two	
Related row area three	

How does the query handle many rows?

No	Step
1	Chooses one.
2	Counts them.
3	Checks whether any exist.
4	Finds the most recent one.
5	Aggregates them.
6	Concatenates them.
7	Uses another method.

Where duplicates could appear	
Where records could disappear	

Rung 5: Advanced Comparisons

Does the query create a business defined relationship?

Examples include matching guests to hosts, comparing program values, connecting datasets to applications, or comparing independent subqueries.

Relationship being created	
Why Slate does not provide the relationship directly	
Fields used for comparison	

Null or blank handling	
Test case that should pass	
Test case that should fail	

Rung 6: Reusable Assets

Could this logic become a trusted pattern?

Reusable pattern name	
Who should use it	
When to use it	
When to avoid it	
Owner	
Review date	

Query Review Checklist

Answer each item before the query drives a major action.

Done	Item	Notes
[ ]	Question is defined	
[ ]	Row grain is documented	
[ ]	Base matches row grain	
[ ]	Many row logic is reviewed	
[ ]	Exclusions are clear	
[ ]	Sensitive data exposure is appropriate	
[ ]	Test records are checked	
[ ]	Owner is named	

Done	Item	Notes
[ ]	Review date is set	

Row Grain Note Template

Paste this into query documentation.

This query is based on	
One row represents	
This row grain is correct because	
The main filters are	
The query handles many related rows by	
This query should be used for	
This query should be avoided when	
The owner is	
The next review date is	

Meeting Exercise

Time needed: fifteen minutes.

No	Step
1	Open one important query.
2	Ask each person to write the row grain sentence.
3	Compare answers.
4	Find the first place where assumptions diverge.
5	Rewrite the query description.
6	Decide whether the query needs a deeper peer review.

Signal To Action Matrix

Chapter 3 companion resource

Purpose

Use this worksheet when a student behavior, score, segment, engagement pattern, or model output might change outreach or staff action.

The purpose is to keep signal interpretation humble, useful, and reviewable.

Signal Profile

Signal name	
Where the signal comes from	
Population affected	
Journey stage	
Owner	
Current use	
Review date	

Matrix Fields

Observed behavior

What happened	
Where it was captured	
How current the data is	

Possible interpretation

What it may suggest	
What it may fail to prove	
Other possible explanations	

Confidence level

Confidence rating	
Why the team trusts or questions the signal	
Evidence that would increase confidence	

Allowed action

What action may happen	
What action is off limits	
Which action requires human review	

Owner

Action owner	
Data owner	
Escalation path	

Timing and channel

Timing	
Channel	
Frequency limit	
Expiration window	

Suppressions

Who should be excluded	
Which recent actions suppress this outreach	
Which student states suppress this outreach	

Measurement plan

Success measure	
Review cadence	
Where results will be reviewed	
What would cause the action to change	

Policy Sentence

Finish the sentence before using the signal for outreach.

When	
We believe it may mean	
So this owner	
May take this action	

Through this channel	
Within this timing	
Unless these suppressions apply	
We will judge success by	

Action Group Builder

Use this for a campaign or staff list.

Group one	
Signal	
Interpretation	
Action	
Owner	
Suppression	
Measure	
Group two	
Signal	
Interpretation	
Action	
Owner	
Suppression	
Measure	
Group three	
Signal	
Interpretation	
Action	
Owner	

Suppression	
Measure	

Misuse Check

What label could overstate the signal	
What action would be too strong for this evidence	
What student experience concern should be reviewed	
What staff training is needed before the signal appears in a list or dashboard	

Meeting Exercise

Time needed: twenty five minutes.

No	Step
1	Choose one signal that already appears in Slate or reporting.
2	Ask what the office currently assumes it means.
3	Name two other possible meanings.
4	Define one allowed action and one action that is off limits.
5	Write the policy sentence.
6	Decide whether the signal is ready for action, awareness, research, or retirement.

Communications Governance Map

Chapter 4 companion resource

Purpose

Use this worksheet before building or expanding a major campaign family. It is most useful for application completion, missing materials, event follow up, admitted student next steps, transfer outreach, parent and supporter communication, post deposit tasks, or source based campaigns.

The goal is to make personalization reusable, testable, explainable, and owned.

Campaign Profile

Campaign family	
Audience stage	
Primary student action	
Primary institutional decision	
Channels involved	
Campaign owner	
Audience logic owner	
Content owner	
Review date	

Governance Questions

Who is eligible?

Audience definition	
Required status or condition	
Cycle or term	

Why are they included?

Student need	
Institutional purpose	
Decision supported	

What action does this campaign support?

Desired student action	
Desired staff action	
What should change after response	

Which channels are involved?

Email	
Print	
SMS	
Portal	
Phone	
Chat	
Other channel	

Which fields or behaviors may change the content?

Personalization input one	
Personalization input two	
Personalization input three	
Inputs that should stay out of content	

Which sources are trusted enough for personalization?

Trusted source one	
Trusted source two	
Trusted source three	
Source definitions that need cleanup	

Which assets are reused?

Template	
Content blocks	
Snippets	
Forms	
Portal pages	
Print pieces	
SMS language	
Caller script	

Who should be suppressed?

Student state suppressions	
Recent contact suppressions	
Channel opt out rules	
Completion suppressions	
Risk or sensitivity suppressions	

What happens when data is blank, stale, or conflicting?

Fallback copy	
Manual review trigger	

Data owner	

Which test records need review?

Test record one	
Test record two	
Test record three	
Blank data scenario	
Conflicting data scenario	
Suppressed record scenario	

What outcome matters?

Primary measure	
Secondary measure	
Review location	

Who owns maintenance?

Content maintenance owner	
Logic maintenance owner	
Reporting owner	

When will the campaign be reviewed?

Review date	
Update trigger	
Retirement condition	

Exercise

Time needed: thirty minutes.

No	Step
1	Choose one campaign family.
2	Complete the audience, purpose, assets, suppressions, and testing sections before editing copy.
3	Find one personalization input that lacks enough trust.
4	Find one reusable block that should exist.
5	Write the review date into the campaign documentation.

Completion Standard

The map is complete when another person can explain who receives the campaign, why they receive it, what changes the content, who is suppressed, what was tested, who owns it, and when it will be reviewed.

One Event Signal Worksheet

Chapter 5 companion resource

Purpose

Use this worksheet for one major event or event supported portal experience. It can support admitted student days, open houses, program events, visit days, virtual events, counselor events, or parent and supporter programs.

The goal is to design the event as a signal loop, with attendance as one piece.

Event Profile

Event name	
Audience	
Event date	
Primary owner	
Operations owner	
Communication owner	
Portal owner	
Review date	

Student Purpose

What is the event supposed to help the student do	
What questions should the event answer	
What next step should feel clearer after the event	
What student experience should be avoided	

Institutional Learning

What is the event supposed to help the institution learn	
Which decisions could improve because of the event	
Which staff actions could change after the event	
Which signals should be reviewed later	

Before The Event

Signals captured before the event	
Registration fields	
Program or interest fields	
Guest or supporter information	
Portal activity	
Communication response	
Known limits in the data	

During The Event

Signals captured during the event	
Check in	
Session attendance	
Schedule choice	
Questions asked	
Staff interactions	

Real time response plan	

After The Event

Signals reviewed after the event	
Follow up clicks	
Portal return activity	
Application movement	
Deposit movement	
Checklist movement	
Survey response	
Counselor interaction	

Signals To Leave Unused

Which captured signals lack an action plan	
Which signals could confuse staff	
Which signals need more testing	
Which signals should stay out of outreach for now	

Action Paths

Attendees	
Action	
Owner	

Timing	
Measure	
No shows	
Action	
Owner	
Timing	
Measure	
High intent participants	
Action	
Owner	
Timing	
Measure	
Portal active participants	
Action	
Owner	
Timing	
Measure	

Portal Support

Which portal pages or tabs support the event	
What should students find there	
What should happen after the event	
Who owns updates	

Review date	

Simplify Before Next Time

What should be removed	
What should be combined	
What should be renamed	
What should be documented	
What should be reviewed with staff	

Meeting Exercise

Time needed: thirty minutes.

No	Step
1	Choose one event.
2	Define the student purpose and institutional learning goal.
3	List signals before, during, and after the event.
4	Mark any signal that lacks an action plan.
5	Write separate action paths for attendees and no shows.
6	Decide what will be simplified before the event runs again.

Hidden Operating System Brief

Chapter 6 companion resource

Purpose

Use this brief for one hidden object or one connected process. Good candidates include old rules, workflows, assignment lists, permission groups, lookup values, source codes, datasets, scheduled queries, event templates, portal logic, or inherited reports.

The goal is to make hidden logic visible enough to review, maintain, rebuild, or retire.

Hidden Object Brief

Object name	
Object type	
Where it lives	
Current owner	
Technical contact	
Last reviewed	
Next review date	

Plain Language Description

What does the object do	
Why does it exist	
What business process does it represent	
Who is affected by it	

Trigger And Population

What triggers it	
Which population or records it affects	
Which timing matters	
Which exclusions matter	

Dependencies

What process depends on it	
What depends on its output	
Which reports, portals, campaigns, rules, or workflows may be affected	
Which other object should be reviewed before changes	

Ownership

Who owns the business decision	
Who understands the technical build	
Who approves changes	
Who needs to be notified after changes	

Testing

How should it be tested	
Test record one	
Test record two	
Expected result	
Failure result	

Risk

What happens if it breaks	
What happens if it runs incorrectly	
What happens if it is removed	
What student or staff experience could be affected	

Future Plan

Choose one path.

Keep	
Document	
Rebuild	
Consolidate	
Restrict	
Retire	
Reason for the choice	

Next action	
Owner	
Due date	

Connected Process Trace

Use this section when the issue spans several objects.

Process being traced	
Visible object that starts the process	
Hidden logic that acts on the record	
Staff role that sees the output	
Action that should happen next	
Report or review that checks the outcome	
Objects with higher risk	
Objects needing documentation	
Objects that should be retired or rebuilt	
Owner of the next review	

Exercise

Time needed: twenty minutes.

No	Step
1	Choose one hidden object staff avoid changing.
2	Complete the plain language description.
3	Name what depends on it.

No	Step
4	Define one test case.
5	Choose the future plan.
6	Assign the next action.

Slate Teaching Brief

Chapter 7 companion resource

Purpose

Use this brief when a Slate build works and now needs to be taught. The build can be a campaign, query, report, portal page, rule, workflow, event process, Reader process, source map, dashboard, or governance routine.

The goal is to turn private understanding into shared practice.

Brief Profile

Process or build name	
Audience for the brief	
Owner	
Maintainer	
Approver	
Date created	
Review date	

Purpose

What the process accomplishes:

Why it matters:

Which decision, action, or student experience it supports:

Audience

Who uses it	
Who owns it	

Who maintains it	
Who approves changes	
Who needs orientation only	
Who needs deeper training	

Data

Where the key data comes from	
Definitions that matter	
Known limits	
Fields, sources, statuses, or records learners should recognize	

Logic

Major rules	
Major workflows	
Major populations	
Major statuses	
Dependencies	
What should never be changed without review	

Normal Use

Step one	
Step two	
Step three	
Step four	
What confirms the process worked	

Exceptions

Common exception one	
What to do	
Common exception two	
What to do	
Common exception three	
What to do	
Escalation path	

Risk

What could go wrong	
Which changes need review	
Which students, staff, or reports could be affected	
How errors should be corrected	

Practice Task

Task the learner must complete	
Sample record or scenario	
Expected result	
Evidence of completion	

Teach Back Rubric

Ask the learner to explain or perform each item.

Purpose

Can the learner explain why the process exists	
Evidence	

Data

Can the learner identify where the data comes from	
Evidence	

Logic

Can the learner describe the major logic	
Evidence	

Task

Can the learner perform a basic task correctly	
Evidence	

Risk

Can the learner identify what could go wrong	
Evidence	

Escalation

Can the learner name the owner or support path	
Evidence	

Documentation

Can the learner document what changed	
Evidence	

Transfer

Can the learner teach the basic workflow to another user	
Evidence	

Training Level

Choose the expected level for this learner.

No	Step
1	Orientation. The person understands what the process is, why it exists, and where to find help.
2	Operation. The person can perform the process correctly in normal cases.
3	Troubleshooting. The person can recognize common errors and know what to check.
4	Maintenance. The person can update approved parts of the process safely.
5	Stewardship. The person can evaluate whether the process still fits current needs and guide future changes.

Expected level	
Current level	
Next practice needed	

Review

Owner	
Review date	
Update trigger	
Where this brief should live	

Practitioner Stack Self Assessment

Chapter 8 companion resource

Purpose

Use this worksheet for staff development. It turns broad professional growth into one skill focus, one related skill, one proof artifact, and a one quarter plan.

The goal is concrete evidence of growth.

Staff Profile

Name	
Role	
Current work area	
Manager or mentor	
Quarter	
Review date	

Skill Area Ratings

Rate current confidence from one to five.

One means early awareness. Five means the person can guide others and improve practice.

AI Evaluation

Current confidence	
Where this skill appears in current work	
Proof artifact to build	

Possible artifacts include prompt review checklist, safe use note, or documented AI assisted workflow.

Data Architecture

Current confidence	
Where this skill appears in current work	
Proof artifact to build	

Possible artifacts include field decision guide, dataset plan, related record note, or external source map.

Query Literacy

Current confidence	
Where this skill appears in current work	
Proof artifact to build	

Possible artifacts include reusable query pattern, row grain note, join review, or validation checklist.

Reporting And Action Design

Current confidence	
Where this skill appears in current work	
Proof artifact to build	

Possible artifacts include report purpose note, decision statement, refresh cadence, and action path.

Communications Governance

Current confidence	
Where this skill appears in current work	
Proof artifact to build	

Possible artifacts include campaign governance map, suppression policy, content block inventory, or test record plan.

Portal And Event Architecture

Current confidence	
Where this skill appears in current work	
Proof artifact to build	

Possible artifacts include event signal loop, portal tab plan, owner map, or review schedule.

Rules And Workflow Governance

Current confidence	
Where this skill appears in current work	
Proof artifact to build	

Possible artifacts include workflow trigger audit, status definition guide, permission review, or process trace.

Training And Documentation

Current confidence	
Where this skill appears in current work	
Proof artifact to build	

Possible artifacts include teaching brief, teach back rubric, operating brief, or practice task.

Cross Unit Strategy

Current confidence	
Where this skill appears in	

current work	
Proof artifact to build	

Possible artifacts include ownership matrix, support path, shared standards note, or approval map.

One Quarter Plan

Choose one primary skill	
Choose one related skill	
Why this pairing matters	
Proof artifact	
Person who will review it	
Where it will be used	

Three Month Rhythm

Month one goal	
Artifact to build	
Support needed	
Month two goal	
How the artifact will be tested or used	
Who will give feedback	
Month three goal	
What will be revised	
How the learning will be shared	

Evidence Of Growth

What artifact was created	
How it was used	
What changed because of it	
What the practitioner can now explain	
Next skill target	

Summit Adoption Model

Chapter 9 companion resource

Purpose

Use this worksheet after a conference, training, user group, webinar, or shared learning cycle. It helps a team choose a small set of actions that can become real practice within one month.

Choose one decision, one process, one signal, one campaign, one hidden object, one teaching artifact, and one practitioner skill.

Team Profile

Team	
Learning source	
Date	
Facilitator	
People involved	
Month of action	
Review date	

One Decision

Decision the team wants to improve	
What evidence supports the decision today	
Where the evidence lives	
Who owns the action	
What timing matters	

What would change if the evidence were clearer	
What the office should avoid concluding	

One Process

Process to map	
What starts the process	
What data enters	
What rules act on it	
What staff touch it	
What student experience it creates	
What report or review confirms it worked	
What breaks when timing, data, or ownership is unclear	

One Signal

Signal to define	
What it suggests	
What it fails to prove	
Where it fits in the student journey	

Which action it should inform	
Who should see it	
When they should see it	
How the office will review whether the action helped	

One Campaign

Campaign to improve	
Audience	
Suppressions	
Fields that drive personalization	
Reusable blocks	
Scenarios to test	
Content owner	
Audience logic owner	
Result review owner	

One Hidden Object

Object to review	
Why it exists	
Who owns it	
What depends on it	

What happens if it changes	
What should be tested before change	
Future path	

One Teaching Artifact

Artifact to create	
Who it is for	
What it explains	
What it depends on	
What can go wrong	
What should be tested	
Who owns maintenance	

One Practitioner Skill

Skill to grow	
Why this skill matters now	
Proof artifact	
Person who will review it	
How the learning will be shared	

Thirty Day Rhythm

Week one	

Gather notes, choose the decision, and identify team members.

Team action	
Owner	
Week two	

Map the process and define the signal.

Team action	
Owner	
Week three	

Improve one campaign, workflow, report, or hidden object.

Team action	
Owner	
Week four	

Create the teaching artifact, teach it back, and decide what becomes standard practice.

Team action	
Owner	

Idea Sorting

Use now	
Plan next	

Study later	
Share with someone else	

End Of Month Review

Done	Item	Notes
[ ]	Decision statement created	
[ ]	Process map created	
[ ]	Signal definition created	
[ ]	Cleaner campaign or object created	
[ ]	Teaching artifact created	
[ ]	Practitioner skill target named	
[ ]	Decision about standard practice	
[ ]	What should continue next month	