PURPOSE AND STUDENT DECISIONS

Forging Better Slate Delivers

A field guide to planning personalized communications in Slate

Build each communication around the next step a student needs to take. This guide connects audience, message, timing, and action so enrollment teams can plan useful campaigns together.

01 What Slate Deliver supports

Slate Deliver supports personalized email and SMS communications, targeted audiences based on student data and behavior, sequenced journeys, and content that varies for different readers.

Using a preferred-name merge field is a starting point. Counselor assignment, program of interest, status, and other appropriate data can also help make a message useful.

02 Start with the student decision

Replace a request for a generic email with a clear goal: help students at different stages take the right next step.

One campaign can provide different experiences. For an event, one student may need a registration link, another a calendar reminder, and a previous virtual attendee an invitation to visit campus.

Personalization can reduce unnecessary repeat messages, but it does not automatically reduce inbox fatigue. Coordinate timing and frequency across campaigns.

03 Choose the building blocks

Merge fields bring appropriate student information into a message: preferred name, counselor, program of interest, or other relevant attributes.

Conditional logic shows different content within the same message. For example, invite students who have not registered to sign up, and give registered students event details.

Content blocks provide reusable sections that can be swapped or personalized, such as student quotes by major or deadline reminders by population.

Queries and segmentation define who receives a message and why. Examples include students who started but did not submit an application, or an audience selected for follow-up based on available engagement data.

04 Combine the layers

Use the layers together to make the communication personal, relevant, credible, and easy to act on. Keep the audience selection distinct from the content each reader sees.

Layer	Purpose
Merge fields	Use relevant details to personalize the message.
Conditional logic	Choose content that fits the student's situation.
Content blocks	Reuse appropriate stories, information, and reminders.
Call to action	Make the next step accessible and obvious.

EVENT EXAMPLE AND PHASED REQUESTS

05 One campaign with different next steps

Goal: encourage engagement with an upcoming event. Match the action to what the student has already done.

Student situation	Suggested action
Not registered for the event	Save your spot
Registered for the event	Add to calendar
Previously attended a virtual event	Experience campus in person

These are illustrative conditions, not a ready-to-run rule set. A student can satisfy more than one condition; agree on priority before building the message.

06 Build sophistication over time

Start here: useful merge fields beyond a name, conditional messaging, and one clear primary action for each audience.

Reach further: journey-based sends, behavior-informed follow-ups, and reusable content blocks across campaigns.

An opened-but-not-clicked audience is one possible follow-up segment. Treat engagement data as a signal to interpret, rather than proof of interest or intent.

You do not need every feature at once. Begin with a clear audience and purpose, then add complexity where it helps.

07 Give the builder a useful brief

A strong request explains who the message is for, the audience's stage, the message goal, the action students should take, and the variations that matter.

Example request: This email is for applicants whose files are incomplete. The goal is to help them complete their files. Please vary the next-step guidance for students missing one item versus those missing several items.

If you also want to reach students who have not started an application, define that as a separate audience and give them an appropriate starting action.

08 Match the message to the moment

Use the student's current stage to guide the emphasis. These themes are planning prompts, not fixed descriptions of every student.

Stage	Suggested emphasis
Prospect	Curiosity and belonging
Inquiry	Clarity and confidence
Applicant	Progress and reassurance
Admit	Identity and differentiation
Yield or deposit	Momentum and belonging

09 Write for action

Choose one primary action for each message. Explain what happens after the student clicks.

Too many directions: Explore majors, schedule a visit, apply now, and follow us on social media.

A focused alternative: Schedule your visit to see if this campus feels right.

At the deposit stage, connect the action to belonging: Join the incoming class by submitting your deposit. Use wording that accurately reflects your institution's process.

Match framing to the student's needs. Outcomes and opportunities may help an achievement-focused reader; a simple first step may help someone who is delaying; reassurance and relevant student stories may help someone who is undecided. Treat these as ideas to test, not personality-based guarantees.

Action labels: Start my application. View my next steps. Confirm my spot.

10 Keep judgment at the center

The team brings judgment, empathy, and institutional knowledge. Deliver provides tools for structure, relevant content, and scale.

Thoughtful planning and appropriate use of the tools help better messages take shape. Before sending, confirm that the audience, variations, timing, and next steps match your intended experience.

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