REFERENCE GUIDE

# Best Practices for Mongoose Cadence & Slate
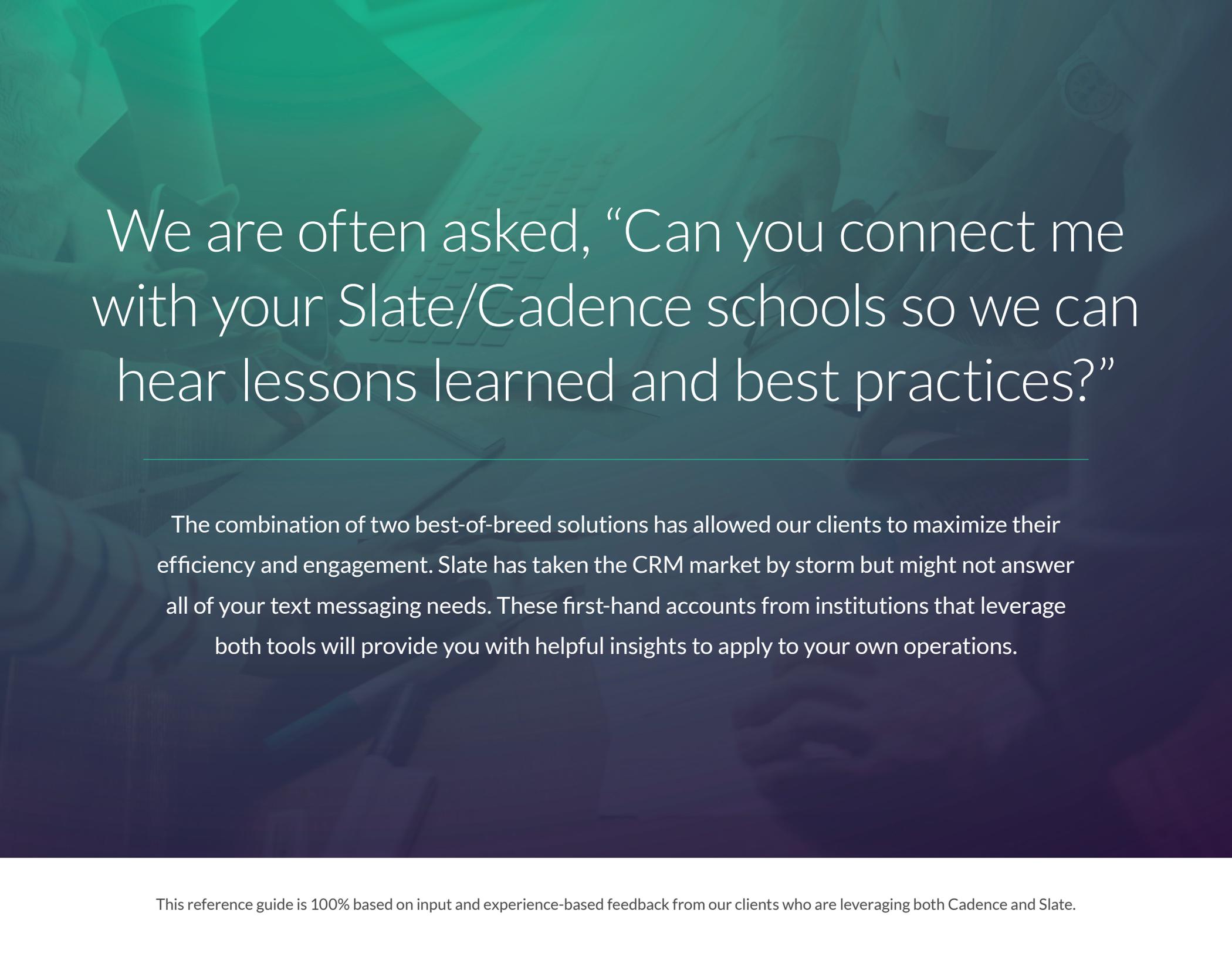
We are often asked, "Can you connect me with your Slate/Cadence schools so we can hear lessons learned and best practices?"

The combination of two best-of-breed solutions has allowed our clients to maximize their efficiency and engagement. Slate has taken the CRM market by storm but might not answer all of your text messaging needs. These first-hand accounts from institutions that leverage both tools will provide you with helpful insights to apply to your own operations.

This reference guide is 100% based on input and experience-based feedback from our clients who are leveraging both Cadence and Slate.
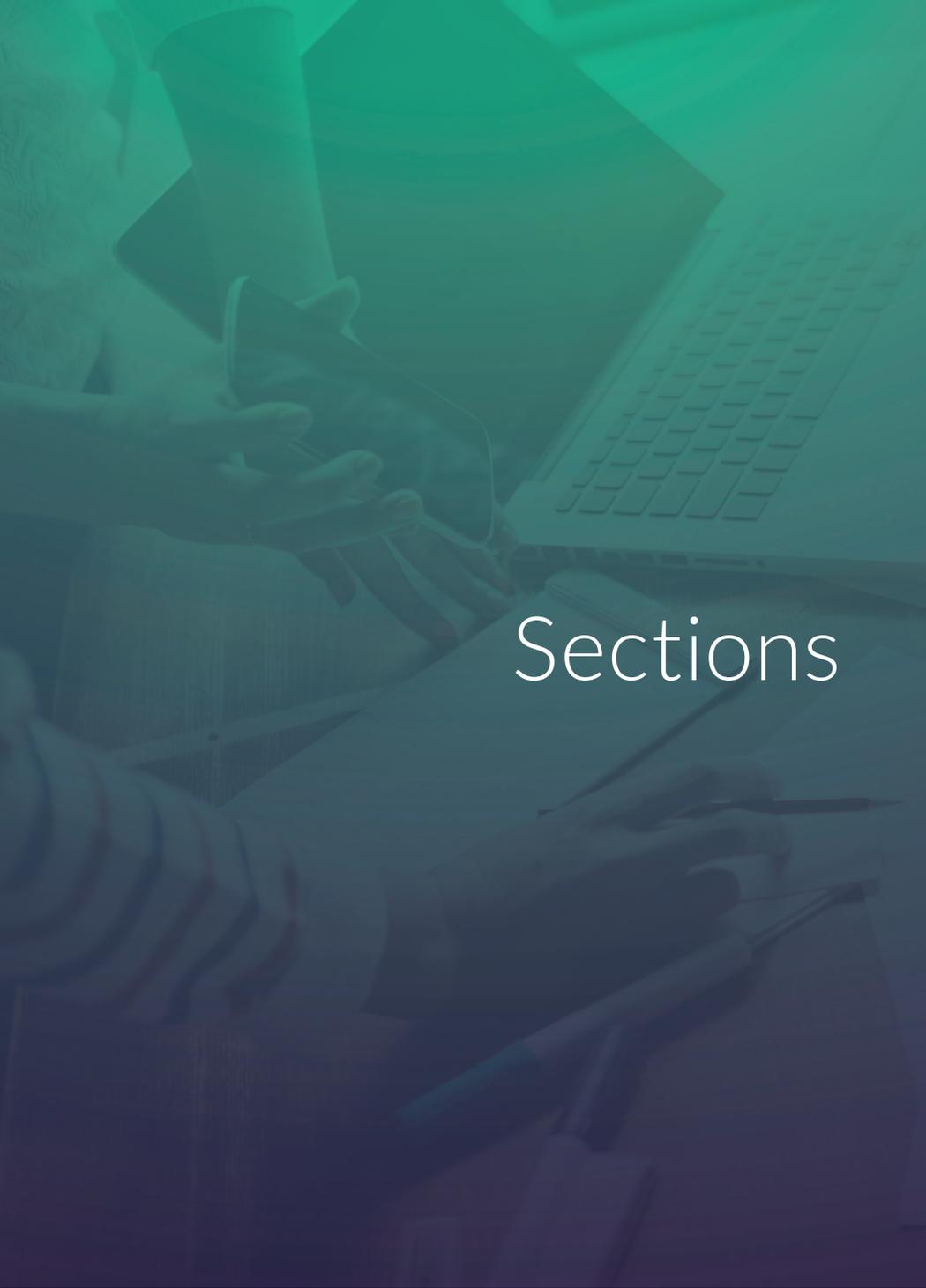
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# Benefits of Slate & Cadence

Both tools provide unique competitive advantages, allowing users to maximize their effectiveness in key areas.

"The first full year we had
Slate and Cadence we over-enrolled our
freshman class rather dramatically."

– WES SULLIVAN, California Lutheran University

# Competitive advantages

**SLATE**

> "We love Slate. **It's extremely customizable** and allows our staff to do things ourselves without having to rely on IT."

> "Integrates with SIS, as well as with Cadence."

> "*It's purpose-built for higher ed.*"

> "Allows the creation of specific queries that we can reference to reach students in a more unique way."

> "Everything is included. We pay one fee."

> "The products are always being updated with great new **features that are actually very helpful.**"

> "We love our IT people, but they have a lot of other things to do."

**CADENCE**

> "**Over 50% of our incoming class said they chose us because we allow them to engage in text conversations with us.** Students stated they did not have that opportunity with other schools. Being responsive brought us into their consideration set where we may not have been initially. They wanted an institution who would be like that for them."

> "**Our counselors say it lightens the overall workload.** While we are adding another channel, it is actually faster and more efficient for us."

> "**Cadence allows us to tailor the messages in intuitive ways on all devices.** This ease means the counselors can actually use the platform to have real conversations. That is where we have a competitive advantage."

> "Having individualized conversations, answering questions quickly, reassuring them when they have doubts or questions, in-the-moment instead of not making them wait for us to get back to them. Cadence makes all of that possible for us."

> "We text because we actually get responses."

> "Texting becomes more and more important each year."

> "The generation of counselors that we have is really good at texting."

# 2-way native Slate integration

**mongoose** cadence ⇄ **slate**

✔ Contact records are automatically imported from Slate

✔ Text messages are automatically recorded on the contact's timeline in Slate

✔ Opt-outs from Cadence automatically update contact records in Slate

# Comparing the Slate texting feature with the Cadence texting platform

It's not logical to have duplicate solutions, but a closer look will show that Slate and Cadence are not at all the same thing.

# What users of both Slate and Cadence say

❯ *"The functionality in **Slate was not as robust as we would have liked** - so that is why we switched back to Cadence."*

❯ *The reason we decided to move back to Cadence from the Slate texting feature is that **Cadence fosters what feels like real text conversations. Students feel more like they are texting back and forth with a real person."***

❯ *"Functionality was key for our counselors. They picked it up much easier and **the platform is more flexible in terms of receiving documents.** That has been huge for us this cycle to complete more applications as students have been able to take screenshots of things and send them to us."*

❯ *"The positive is that Slate's texting feature is in Slate. It's automatic and in the student's timeline. The downside is that texts are delayed quite a bit. Rules have to run to notify a counselor that a student has replied. It's not as immediate as if I got a text on my cell phone. It could be several minutes before I knew that a student had replied. **Cadence just runs a lot smoother and works a lot better for our needs.**"*

❯ *"**Cadence allows our staff to be very flexible** - they are notified instantly and can reply no matter what device they are on - desktop, tablet, mobile."*

❯ *"**Staff time is one of our most valuable resources** - things need to be easier - not harder."*

❯ *"It is staggering how different the texting feature in Slate is compared to Cadence. I mean, Slate can send text messages, but it is not anywhere near as clean or intuitive. **Ease of use is everything.**"*

❯ *"Only using **Slate's texting feature often leads to more one-way messaging rather than having 2-way conversations.** That is where the real competitive advantage lies."*

❯ *"**With Cadence, you do not have to set up filters or rules or anything.** The text messages just immediately go to the right counselor. They instantly get a push notification to their phone. This allows us to be able to respond more quickly. It makes a huge difference."*

"The reason we decided to move back to Cadence from the Slate texting feature is that Cadence created real text conversations. Using Slate and Cadence absolutely provides us with a competitive advantage."

– JEREMIAH TUDOR, Georgetown College

# Experience-based recommendations

Using both solutions in tandem has allowed our clients to be more efficient and effective - and to share their knowledge with others.

## Add custom fields right away.

Determine what contact information you are going to use when texting. Think about fields
that would be valuable through the entire cycle (not just the beginning or end).

Custom field suggestions: Entry term, student type, date of most recent FAFSA, school name, school CEEB,
# times visited, city, state, application status, missing application items, entry term, and decision status.

## Handle opt-outs and avoid over-texting.

> Opt-out: if a student is canceled in Slate, they are automatically opted-out in Cadence.

> Opt-outs, messages, and delivery errors are all automatically stored back in Slate.

> We use tags in Slate to help manage students who we should no longer text.

> Set up fields in Slate:
  - "Text Message Phone Number"
  - Text Opt-In

  Use these fields in your query when determining who to text. For example:
  ('Text Message Phone Number' has data) AND ('Text Opt-in' = YES)

> Use queries in Slate to make sure we are not overcommunicating with students. For example:
  'Have not received a mailing (text mailing) within the last X days'
  - Consider eliminating those records from non-critical mailings (text mailings) so you are not over-communicating.
  - Build your query around these tags so that if the record is tagged with 'Do not communicate', 'test record',
    or 'text message opt-out' they are excluded from that (text) mailing.

## Use texts to effectively set up phone calls.

**There was a time when institutions would simply try to call every admitted student. One of our schools, in particular, has had success sending texts prior to phone calls to increase engagement.**

*"At least at first, the students would prefer to text with us. Now, we use Cadence to help set up phone calls. We will text students and ask them if they want a phone call. If they reply yes, we send them a link using the scheduler function in Slate. This way, they can pick a specific time for the call and indicate topics and questions they have. Then it is much more of a 'warm lead.' Because the student picked the date and time for the call, the percentage of students who answer is exponentially higher than 'calling cold.' Also, because the student indicated the types of questions they have, we can be sure to have the right person from our office there to answer them. Then add notes about that call right in Slate. Our staff is happier. The students are happier."*

## Who should have access to Cadence?

*"Financial Aid and Admissions staff need to be engaged in communications. Student workers can help as well."*

## Select the best times of day to text out of Cadence.

**Most texts: 2-4 p.m.**

*"That is when students are most responsive and because most replies come back in a matter of minutes, our counselors are ready and primed to continue the conversation."*

**Initial text:**

*"This is the first introduction of the counselor to the student. Get into their phone as a contact as soon as possible. It lets them know we are there if they have any questions. We are constantly astounded when, months later, students proactively text us with specific questions. We send these in the early evening (when the student is more likely to be at home) with time to add us to their phone as a contact."*

## Create a communications plan using Slate and Cadence.

› *"Set up drip campaigns just as you would with any other comm plan. Then, incorporate Cadence text messages into those campaigns. Meet weekly to review your plan and adjust as needed."*

› Remember that print is NOT dead. Our clients have had great success sending postcards from Slate:
  - Ahead of high school visits
  - For event invites

## Ensure your counselors are ready for efficient conversations.

› Block out times in calendars for responses.

› *"When using group accounts in Cadence, be sure to have someone who is ultimately responsible for incoming messages. While most students reply within minutes, some will wait days or weeks until they are ready to respond - often with a question."*

## Most advantageous points in the comm flow to send texts with Cadence?

› Initial introduction

› Missing documents (consider emailing as well)

› Congratulate admitted students

## Use Cadence to find even more duplicate records.

Phone numbers often exist in Slate in more than one field. When you import these records into Cadence, Cadence will automatically send you a report of duplicates making it easy to clean up your data.  Furthermore, when you import phone numbers that are either invalid or landlines, Cadence automatically sends you a report of those as well. Cleaner data saves time, helps you reach more students, and makes for a more efficient staff.

At Mongoose, we revolutionize communications in higher education through our products, our service, and our industry insights.

**We developed Cadence — higher education's preferred enterprise texting platform for communicating with constituents.**

MongooseResearch.com/Cadence

**Blog**

MongooseResearch.com/blog