

# University Slate Deliver MOU

## 1. Purpose

This MOU establishes guidelines for university staff and faculty regarding the appropriate use of Slate CRM for email communications with prospective and current students. The goal is to ensure that all emails sent through Slate are:

- Strategic, relevant, and personalized to the recipient.
- Aligned with university branding and messaging standards.
- Compliant with legal and ethical regulations, including the CAN-SPAM Act.
- Respectful of student privacy and data protection best practices.

By following this MOU, the university maintains a professional image, improves engagement rates, and prevents excessive or irrelevant communications that could overwhelm recipients. Slate was implemented to help student-services offices, academic colleges, and organizations communicate to large segments of our campus community.

## 2. Scope

This MOU applies to all faculty, staff, and university personnel who have access to Slate for sending emails to prospective, admitted, and enrolled students. It covers all email campaigns, automated messages, and one-time communications sent via Slate's email platform.

## 3. Definitions

Prospect – A potential inquiry who has shown initial interest in the university but has not yet taken direct action to request information.

Inquiry – Someone who has explicitly expressed interest in UofM. Departments can communicate to Graduate inquiries but not to Undergraduate inquiries.

Applicant – Someone who has submitted an application but has not yet received a decision.

Admits – An applicant who has received an offer of admission to UofM. Units can communicate with those who have been admitted into their college/major.

Admit/Matric – An admitted applicant who has either submitted their enrollment confirmation for UG or has submitted their Intent to Enroll for GR.

NSO Registered (UG) – An admitted applicant who has registered for a New Student Orientation session.

Registered – An admitted applicant who has successfully registered for at least one (1) hour of UG or GR courses at UofM.

Currently Enrolled - A registered student who is currently enrolled at UofM in either UG or GR courses.

Population – A group of individuals who share specific attributes and are segmented for targeted email marketing.

Slate – A Customer Relationship Management (CRM) technology for managing the UofM's relationships and interactions with students and prospective students. It provides UofM a single system to manage prospective and enrolled student information from the initial point of contact, through the application, admission, and enrollment process.

Transactional Messages – System-generated emails triggered by user actions (e.g., application confirmations, interview reminders).

Call-to-Action (CTA) – A clear and compelling instruction that encourages the recipient to take a specific action. CTAs are designed to drive engagement and conversions.

Yield Emails – An email that targets admitted students to encourage enrollment decisions.

## **4. MOU Guidelines**

### **4.1 Use of Slate for Email Communications**

Slate is a Customer Relationship Management (CRM) system designed to facilitate effective and data-driven communication with students.

- Emails sent through Slate should be strategically planned and targeted to the appropriate audience.
- Slate's email tracking and analytics features (e.g., open rates, click rates, bounce rates) should be used to assess email effectiveness and refine messaging strategies.
- Mass or general emails should be avoided unless absolutely necessary (e.g., university-wide announcements).
- Use of personal email accounts (e.g., Gmail, Yahoo) for sending official university communications is strictly prohibited. All emails should be sent from a UofM email account.

### **4.2 Targeted and Personalized Messaging**

To maximize engagement, Slate emails should be customized and relevant to the recipient. Best practices include:

- Segmenting audiences based on student status (e.g., inquiry, applicant, admitted, registered, currently enrolled). Official College queries have been created for use by Enrollment Services Slate CRM Administrators. These queries must be used to send emails in Slate. Failure to use the query templates may result in termination of Slate Deliver access.
- Academic Colleges are encouraged to communicate to admitted undergraduate applicants and graduate prospects, inquiries, applicants, and admits as defined above in section 3.

- Using Slate merge fields to personalize emails with names, application details, or program interests.
- Avoiding generic mass emails by tailoring messages to specific student needs, timelines, and actions.

### **4.3 Brand Consistency and University Identity**

All Slate emails must align with university branding and communication standards:

- Official university templates have been created for your use by Enrollment Services Slate CRM Administrators. These templates must be used to send emails in Slate. Failure to use the templates may result in termination of Slate Deliver access.
- Fonts, colors, and logos must comply with brand guidelines set by the Marketing and Communications Department.
- The tone and voice should reflect the university's professional and welcoming image.

### **4.4 Email Subject Lines and Content Best Practices**

To enhance email deliverability and engagement:

- Subject lines should be concise, clear, and reflective of the email content (avoid misleading or overly promotional language).
- Use compelling preview text that provides value to the recipient.
- The main content should be scannable and easy to read, with clear calls to action (CTAs).
- Avoid excessive images or attachments that may trigger spam filters.

### **4.5 Opt-Out and Unsubscribe Requirements**

Compliance with email marketing regulations is mandatory:

- Every Slate email must contain a clearly visible "unsubscribe" link.
- Opt-out requests must be honored immediately and reflected in Slate's suppression lists.
- Users must not re-add students to email lists without their explicit consent.

### **4.6 Email Frequency and Avoiding Overcommunication**

To prevent overwhelming students:

- Each department should establish reasonable email frequency limits based on student engagement patterns.
- Overlapping or conflicting emails from different university offices should be avoided. To comply with this, departments must submit their message request to the Slate CRM Administrator to coordinate the messaging schedules.

## **4.7 Data Privacy and Security in Slate Communications**

Ensuring student data privacy is a top priority in all email communications sent through Slate. Staff and faculty must adhere to university data protection policies, FERPA (Family Educational Rights and Privacy Act) regulations, and other applicable privacy laws.

### **4.7.1 Limited Use of Student Data**

- Emails must be directly relevant to a student’s inquiry, admission application decision, or enrollment.
- Do not include personally sensitive information, such as:
  - Social Security Numbers (SSNs)
  - Financial aid details or billing information
  - Academic records beyond general enrollment information
  - Health-related data or disability accommodations
- Staff should only access and use student email lists for approved purposes and within their designated role.

### **4.7.2 Secure Handling of Email Lists and Data**

- Email distribution lists in Slate should be regularly reviewed and updated to prevent outdated or incorrect recipients from receiving communications.
- All downloaded or exported student data (e.g., spreadsheets with email addresses) must be stored securely and never shared via personal email or external cloud storage.
- Access to Slate email functionality is restricted to authorized personnel only. Staff must complete training before being granted email-sending privileges.

### **4.7.3 Compliance with Student Consent and Opt-Out Requests**

- If a student has opted out of receiving emails, they must not be manually re-added to mailing lists unless they re-subscribe through an official opt-in process.
- Communications should clearly explain why the student is receiving the email (e.g., “You are receiving this email because you applied for [Program Name] at [University Name]”).
- For marketing or promotional emails, explicit student consent should be collected during event sign-ups or application submissions.

## **5. Internal Review and Approval Process**

### **5.1 Internal Review**

A Final Communication Checklist will be provided. Confirm that you have completed all items on the checklist including the check of the Recipient Count against OIR PowerBI.

## **5.2 Approval Process**

To ensure compliance and effectiveness:

- Departments should submit draft emails for review to the Slate CRM team at least 3 business days before the scheduled send date.
- Approved emails should be test-sent to internal staff before launching to students.
- Analytics and feedback should be reviewed post-send to improve future communications.

## **6. Enforcement and Consequences**

Violations of this MOU may result in:

- Revocation of Slate email privileges.
- Required email best practices training.

## **7. Support and Training**

For guidance on Slate email best practices, branding requirements, or compliance questions, please contact:

 <https://www.memphis.edu/enrollment/slate>