



**POST CAPTAIN**  
CONSULTING

# SLATE FOR ADVANCEMENT IMPLEMENTATION FAQs

## Thinking about switching CRMs?

Here's what you should know before implementing Slate and how Post Captain can help make the process smoother, smarter, and more successful.

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# YOUR QUESTIONS, ANSWERED

## 1 What experience does the Post Captain team have with Slate for Advancement?

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Our team includes former Slate Captains and experienced advancement professionals who have led numerous Slate implementations, both in their previous roles and as consultants.

## 2 What types of institutions do you work with?

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We've partnered with colleges and universities of all sizes, from small liberal arts institutions to large, complex advancement operations. This breadth of experience helps us adapt our strategies to different team sizes, structures, and goals.

## 3 What are the benefits of choosing Slate for Advancement?

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Slate allows you to consolidate multiple systems into one unified platform, helping your team streamline processes and reduce manual work. With cleaner data and stronger reporting, you gain clearer insights and more time to focus on strategy instead of managing systems.

## 4 What are the typical phases of an implementation?

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While every project is unique, our work generally follows this sequence:

1. Process Mapping & Database Setup
2. Data Configuration & Automation
3. Gift Processing, Gift Officer Management, & Finance Integration
4. Reporting, Queries, Events, & Mailings
5. Training & Post-Go-Live Support

## 5 What is the typical investment for this type of project?

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Because every implementation is tailored to your team's goals and complexity, costs can vary. That said, most full Slate for Advancement implementations fall in the range of \$75,000 to \$150,000.

## 6 What is the typical investment for this type of project?

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We recommend dedicating the equivalent of at least one full-time role from your advancement team to serve as the internal implementation lead, helping coordinate across departments and keep the project on track. Some institutions use a co-lead model, as long as the combined availability meets that level of commitment.

Additional teams also play an important role. IT supports integrations and data migration, Marketing and Communications helps with branding and outreach, and Advancement teams (like Advancement Services, Gift Officers, and Alumni Relations) help shape processes and reporting. To balance staff time, many institutions combine larger, less frequent check-ins with targeted working sessions for specific teams during discovery and build.

# YOUR QUESTIONS, ANSWERED

## 7 How do you approach data migration into Slate for Advancement?

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We take a phased approach, starting with a detailed audit of your current data structure. From there, we build a strong foundation by migrating core constituent records first, followed by secondary and custom datasets. Along the way, special attention is given to reconciling differences between legacy platforms and Slate. (For example, converting multi-fund gifts in a legacy system to Slate's one-to-one gift-to-fund model.)

## 8 How do you handle system integrations?

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Integration planning begins early in the project. During initial scoping, we work with you to identify all systems that need to connect to Slate. From there, we determine the best timing for each integration during the build. We manage the Slate-side setup of queries and source formats, while your team provides data files, export specifications, and documentation on field definitions, mapping rules, and business processes.

## 9 How do you approach staff training?

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We train as we build, so your team gains hands-on experience throughout the implementation. We also provide a tailored, multi-day training program designed around each group's responsibilities and technical skill level.

## 10 Can Slate scale as our team or institution grows?

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Absolutely. We tailor your Slate implementation with the future in mind, building scalable entities, datasets, and automation so the system can grow with your team and evolving institutional needs. This approach ensures Slate continues to support your advancement operations efficiently as your programs and goals expand.

## 11 What kind of post-go-live support do you offer?

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We provide dedicated post-go-live support to help your team transition smoothly and make the most of Slate. Any additional projects or new features can be scoped separately, and we remain a partner as your advancement operations evolve.



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**YOUR SLATE  
JOURNEY  
*STARTS HERE***

Schedule an intro call with a team that truly understands your work.

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