



Axiom Elite Slate Implementation & Consulting Services

Template of Services Provided

Consultation/Best Practices including but not limited to:

- Use Cases & End User Needs: Student, Counselor, Leadership
- Data Governance Best Practices

Implementation Services

<ul style="list-style-type: none">• Application Build• Reader Configuration and Workflows• Inquiry Forms & Training• Axiom Elite Data Integration Prep• Rules/Process Configuration & Training• Email & Campaigns	<ul style="list-style-type: none">• Events• Query Build & Training• Funnel Report Build & Training• User Security & Roles• Documentation of Step-by-Step Implementation
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Scope of Work: Process & Expectations

Project Introduction & Team Planning

The Project Introduction & Team Planning Process will review the current, and ideal, state of the Admissions Process and ensure the new CRM configuration accounts for all business and data needs. The Client Team should choose a Project Team including individuals with the following knowledge/responsibilities:

- Slate CRM Captain(s)
- Admissions processes/counselors
- Enrollment processes/data management
- User security

Use Cases/Discovery

The Client Team will work with the Axiom Slate Consulting Team to provide all data requirements, process requirements, and user security requirements. The Client Team and Axiom Team will work together to establish the following:

- End user needs & best-case data governance
- Data Configuration: fields, prompts, entities, datasets, etc. needs and requirements
- Application & Reader (Workflows) requirements
- Process and schedule for Implementation Project
- User Security and Roles
- Integration Prep and Planning

Implementation Discovery <i>Estimated Days: 5</i> <i>Internal Time Commitment: 15 hours**</i>	<ul style="list-style-type: none"> • Fact Finding Process • Address Nuances • Review Timeline
Application Build <i>Estimated Days: 15</i> <i>Internal Time Commitment: 45 hours**</i>	<ul style="list-style-type: none"> • Pre-Build: Create Periods & Rounds, Create Fields, Create Prompts, Create Materials, Review & Configure Source Formats for Imported Apps, Add Test Types, Configure Payments • Build: Add Slate-hosted App • Create App Scoped Forms, Custom Form Pages, Submission Requirements, Email Notifications for Apps • Add Logic to Forms • Customize Pages • TEST APP! • Post-Build: Create Checklist, Organize Checklist, Active Application Rules, Build Payment Rules
Reader/Workflows <i>Estimated Days: 10</i> <i>Internal Time Commitment: 30 hours**</i>	<ul style="list-style-type: none"> • Fact Finding Process • Configure Reader/View Permissions • Configure Workflows
Inquiry Forms <i>Estimated Days: 5</i> <i>Internal Time Commitment: 15 hours**</i>	<ul style="list-style-type: none"> • Create Bins • Create Rules • Other Customizations
Email & Campaigns <i>Estimated Days: 5</i> <i>Internal Time Commitment: 15 hours**</i>	<ul style="list-style-type: none"> • Fact Finding Process • Build up to Three (3) Forms • Train the Trainer • Fact Finding Process • Build up to Three (3) Emails / Configure One (1) Campaign • Train the Trainer
Events <i>Estimated Days: 5</i> <i>Internal Time Commitment: 15 hours**</i>	<ul style="list-style-type: none"> • Fact Finding Process • Build up to Three (3) Events • Train the Trainer
Axiom Elite Integration Prep <i>Estimated Days: 8</i> <i>Internal Time Commitment: 25 hours**</i>	<ul style="list-style-type: none"> • Import Axiom Suitcase+ • Fact Finding Process • Configure Filters / Add Additional Exports • Configure Technolutions SFTP • Configure Source Import Formats
Rules/Processes <i>Estimated Days: 10</i> <i>Internal Time Commitment: 30 hours**</i>	<ul style="list-style-type: none"> • Fact Finding Process • Build up to Ten (10) Rules • Train the Trainer
Reports & Queries <i>Estimated Days: 10</i> <i>Internal Time Commitment: 30 hours**</i>	<ul style="list-style-type: none"> • Fact Finding Process • Build Admissions Funnel Report for Slate Landing Page • Build Up to Five (5) Queries • Train the Trainer
Security, Documentation, Closeout <i>Estimated Days: 8</i> <i>Internal Time Commitment: 20 hours**</i>	<ul style="list-style-type: none"> • Fact Finding Process • Security & User Roles Configuration • Prepare & Provide Instance Related Documentation • Prepare For Sign-off & Post PROD Support
Training <i>Estimated Days: 3</i> <i>Internal Time Commitment: N/A</i>	<ul style="list-style-type: none"> • End User Training & Overview
Post PROD Support <i>Estimated Days: 15</i> <i>Internal Time Commitment: 45 hours**</i>	<ul style="list-style-type: none"> • Post PROD Support



**Internal time will vary on team size, technical acumen, and a variety of other factors. This is our best estimate.

Project Assumptions & Requirements

- The Axiom Team will be granted full administrative access to the Slate environment.
- The Client Team will participate in Discovery, providing the Axiom Team process requirements to successfully configure their Slate instance.
- The Axiom Team will build all agreed to requirements based on agreed to specifications at the end of the Discovery period.
- The Client Team will participate in check-in sessions, training, and testing.
- The Client Team will formally approve the conclusion of the project.

Pricing & Billing Schedule

Implementations typically range from approximately **\$45,000 to \$70,000**, depending on the scope and complexity of services required. This pricing reflects our comprehensive CRM build out, integration, training, and ongoing support. We understand that each client's business processes are unique. As such, Axiom will evaluate project requirements and analyze costs accordingly.