UNIVERSITY SYSTEM OF GEORGIA

Transfer Gateway Discovery Project Update

CATRAO Fall 2025

November 18, 2025

Agenda

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- Setting the Stage
- Why This Matters
- Proposed Transfer Gateway
- Student-Focused Features & Functionality
- Institutional Benefits
- How We Got Here
- Seven Intersecting Work Groups
- Common Themes Across Groups
- What Happens Next
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Setting the Stage

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The Challenge

- Current transfer process is fragmented, with multiple systems, forms, and communication channels creating barriers

The Impact

- Students face unclear pathways; campuses manage late, manual processes

The Vision

- A unified, AI-enabled Transfer Gateway delivering clarity, efficiency, and opportunity
- Faster, clearer, more personalized experiences for students and more efficient processes for campuses

Why This Matters

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For Students

Clearer pathways, proactive guidance, reduced barriers

For Institutions

Early insight, streamlined processes, better resource use

For USG

Accessible pathways, stronger retention, and higher completion outcomes

Proposed Transfer Gateway

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AI-Enabled CRM Backbone: Central hub for communications, data, and campaigns

Integrated Tools: Single inquiry/application, document management, event integration

Analytics & Governance: Role-based access, dashboards, continuous improvement

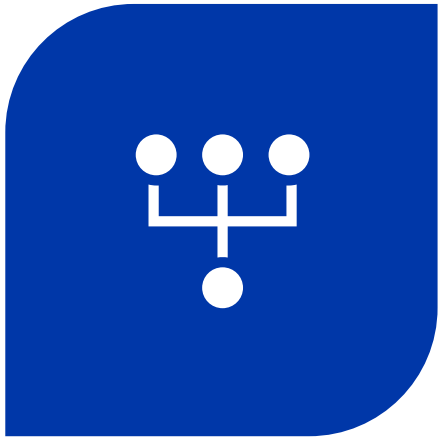
Student-Focused Features & Functionality

- Personalized journey mapping
- AI-driven nudges
- Dynamic checklists
- Resource Hub refresh with integrated tools (DegreeWorks, SteppingBlocks, Georgia Degrees Pay)

Institutional Benefits

- **Early Identification of Transfer Students:** Engage prospects sooner for better yield
- **Operational Efficiency:** Streamlined applications, automated document workflows, integrated events
- **Actionable Data:** Real-time dashboards and predictive analytics to drive decision-making
- **Shared Framework:** Standardized governance, training, and role-based access with local flexibility
- **Stronger Outcomes:** Improved recruitment, retention, and completion rates across USG

How We Got Here



System-Wide Discovery: Began January 2025 with USG-led current-state and policy review

Broad Engagement: 7 work groups, 100+ participants from all 26 institutions

Foundation for Next Steps: Consensus-driven and ready for prioritization

Seven Intersecting Work Groups

- **Technology & AI Based CRM Work Group**
- **Prospective Transfer Student Journey & Communications Work Group**
- **Application, Forms & Document Management Work Group**
- **Student Data & AI Enhanced CRM Work Group**
- **Transfer Gateway Tools & Resources Work Group**
- **Nursing Optimization & Admissions Work Group**
- **Institutional Admin & Campus Access Working Group**

Common Themes Across Work Groups

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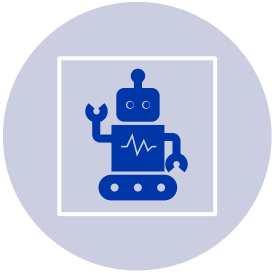
Streamlined Student Experience – Simplifying the transfer journey through clear processes, self-service tools, and user-friendly design.

Standardization Across Institutions – Creating consistent data formats, workflows, and policies to ensure seamless collaboration and integration.



Technology & Integration – Leveraging AI-driven CRM solutions, secure data transfers, and platform interoperability to improve functionality.

Communication & Engagement – Designing coordinated messaging, automated outreach, and personalized advising to enhance student retention.

Common Themes Across Work Groups

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Training & Support – Providing role-based training, onboarding plans, and resources to ensure effective system use.

Data-Driven Decision-Making – Using analytics, dashboards, and feedback loops to inform continuous improvement and measure impact.

Scalable Implementation – Developing phased rollout strategies, pilot testing, and peer mentorship to manage risk and accelerate adoption.

What Happens Next

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USG Leadership

- Reviews findings & recommendations
- Provides direction for next steps
  - Consider competing priorities (i.e., Unified ERP)
  - Funding availability

Closing & Questions

Thank You for Attending

What Questions or Insights Would You Like to Share?