

LISTENING TOUR

Hosted by the UA Trellis CRM Team

Join us on the Trellis Listening Tour as we visit UA colleges and campus partners to talk about CRM, how it could apply to your team, and explore possibilities for adoption. The Trellis team will work closely with you and your unit to align goals and accomplish the benefits of CRM envisioned in the UA Strategic Plan. Information from the Listening Tour will be used for early product design and development.

YOUR LISTENING TOUR SESSION

Listening sessions in the tour will run about **60-90 minutes** with groups of no more than **12 participants** to maximize conversation time.

Led by CRM program leaders, sessions will seek to understand your unit's important **strategic goals, processes, and workflows** that are vital to your constituent interactions.

Ultimately, you will:

- ▶ Gain a shared understanding of what UA CRM is and isn't
- ▶ Explore and gather a collective understanding of how CRM can bring value to your unit
- ▶ Become a collaborative partner with an influential voice in this initiative

SCHEDULE YOUR SESSION

Let us or your leadership team know that you would like to participate in a listening session. Email us at trellis@list.arizona.edu and we will coordinate with your unit on available dates. Participants are encouraged to bring information, energy, and innovative ideas to the table.

WHAT IS TRELIS?

Trellis was created to achieve the goals of the UA Strategic Plan. It is a campus-wide initiative focused on optimizing university relationships and empowering human interactions. The program focuses on implementing an enterprise CRM strategy as a collaborative and technology-enabled solutions service.

WHAT IS CRM?

In higher education, CRM is known as "constituent relationship management." UA constituents include:

- ▶ students
- ▶ faculty
- ▶ staff
- ▶ alumni
- ▶ other groups connected to UA

An Enterprise CRM system can manage an organization's entire constituent interaction by providing a 360-degree view of each relationship and its counterparts. CRM has specific benefits in higher education including:

- ▶ student success
- ▶ retention
- ▶ recruitment



CONTACT US

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