Trellis CRM improves the university constituent experience by enabling you to make data-informed decisions in your day-to-day workflow with tools for:

CONSTITUENT RELATIONSHIP MANAGEMENT

COMMUNICATION  REPORTING  PLANNING  MANAGEMENT  SUPPORT
Trellis CRM (Salesforce) is a technology for managing all your relationships and interactions with contacts. A CRM solution helps you focus on the organization’s relationships with individual people — throughout their lifecycle with UA while providing support and additional services throughout their relationship with you.
With External Partners within the Trellis enterprise system, you will establish thoughtful connection points between you at the University of Arizona and the external business organizations you intend to grow relationships with and communicate on a high level.

**Constituent Ecosystem**
- Leads
- Opportunities
- Business Organizations
- Internal/External Contact Records

**Multiple Connection Points**
- Centralization of interaction data
- Personalized experience
- Supports dept needs
- Supports Campus decisions
- Access real-time contact information

**Pipeline Creation**
- Establish a stable communication channel
- Build connectors with a strong CRM system

**CRM Support & Solutions**
- Connected Campus
- Digital solutions & support
- Visibility and focus on relationships
- MS Teams community
- In-depth training
- Detailed support documentation
- In-app guidance

**Management**
- Long-term relationship building for growth aligned coordination
- Effective engagement through contact mgmt

**Communication Capabilities**
- Use the complete CRM for communications
- Rapidly launch many forms of communications
- Simplify communication outreach from one tool

**EXTERIOR PARTNERS**
- Leads
- Opportunities
- Business Organizations
- Internal/External Contact Records

- Connected Campus
- Digital solutions & support
- Visibility and focus on relationships
- MS Teams community
- In-depth training
- Detailed support documentation
- In-app guidance

- Long-term relationship building for growth aligned coordination
- Effective engagement through contact mgmt

- Use the complete CRM for communications
- Rapidly launch many forms of communications
- Simplify communication outreach from one tool
Trellis provides an enterprise events management tool that will allow you to manage virtual, hybrid, and in-person campus events throughout the year. The application is currently being developed to give users a free, end-to-end events management tool with curated reporting and data integration abilities one that integrates with the rest of the Trellis CRM system suite.
CatCloud is a web interface for students that serves up actionable information from various Arizona systems and puts it in one accessible location. It allows students to easily find and schedule appointments with advisors and other support organizations, integrates with D2L for easy visibility of assignments and grades, and provide a way for them to directly reach their faculty and instructors from the portal.

- View course assignments & materials
- Manage classes, meetings and due dates
- Connect to D2L
- Calendar your course requirements
- View Grades
- Connect with faculty and staff
- CatCash, meal swipes and customized user experience
- Establish a stable communication channel
- Build connectors with a strong CRM system
- Connected Campus
- Digital solutions & support
- Visibility and focus on relationships
- Trained staff to troubleshoot
- Connect with the Trellis team for issues or enhancements
- View open and closed Cases
- Support through detailed case notes
- Connect further to enhance student experience
- Easily manage all aspects of your student life from one place
- Communicate from within webpage
- Dashboard and widget customization
- Easily manage all aspects of your student life from one place
- Communicate from within webpage
- Dashboard and widget customization
Group Communication allows you to build one-time sends through a campaign planned by you to bulk communicate to a targeted audience. All from one location, you can design, edit and send bulk communications.

**Group Communication Capabilities**
- Use branded or unbranded premade templates
- Draft your email to your needs all from one place
- Schedule a send or send on behalf of someone else with ease
- Not ideal for duplication or multiple sends
- Target your audience
- Transactional Sends
- Strategize your send with precision & ease
- Access real-time contact information
- Strategize future sends
- View reports and data on emails sent
- Use the complete CRM for communications
- Simplify communication outreach from one tool
- Use data to influence future sends
- Relationship building
- Use the complete CRM for communications
- Simplify communication outreach from one tool
- Connected Campus
- Digital solutions & support
- Visibility and focus on relationships
- Trained staff to troubleshoot
- Connect with the Trellis team for issues or enhancements
- Relationship building
- Use data to influence future sends
Build strategy and uncover the value of your email campaigns. With the help of UArizona branded templates and access to real-time constituent contact data, your messages will be aligned with other departments, and the centralized tool will give you better visibility into all institutional messages being sent to shared audiences.

- Branded Templates
- Shared Modules, Images and files
- Build your emails to your needs

- Summarized data after each send
- View where your audience is clicking

- Intelligence Reports on your unit, sends and marketers
- Tracking data to influence future sends

- Transactional
- Commercial
- Supports the goal of your communication and contact relationships

- Target specific audiences
- Access real-time contact information
- Offers relationship building
- Use forms and data to influence future events

- Easily manage all aspects of your email from one place
- Track click and open rates and use data to improve communications

- Connected Campus
- Digital solutions & support
- Visibility and focus on relationships

- MS Teams community
- In-depth training
- Detailed support documentation
- In-app guidance

- Specialized Classifications

- CRM Support & Solutions

- Campaign & List Management

- Reporting & Data

- Communication & Dashboards
Trellis provides a suite of phone, live chat, & webform capabilities that helps university service professionals support students and other constituents. The tool is designed to help facilitate in-person and digital service interactions and provides curated reports that integrates with the rest of the Trellis CRM system.
Trellis provides scheduling capabilities that help university service professionals support students and other constituents. The tool is designed to help facilitate in-person and digital service interactions through appointments and provides curated reports that integrate with the rest of the Trellis CRM system.

**Appointment Management**
- Design a schedule of availability
- Easy to see scheduling opportunities for the end user
- Manage calendar that pushes to Outlook
- From each appointment document meeting
- Design plan for each end user and organization
- Case notes on each appointment for easy tracking and organization
- Reporting and dashboards supporting units

**Documentation**

**Case Notes**
- MS Teams community
- In-depth training
- Detailed support documentation
- In-app guidance

**CRM Support & Solutions**
- Connected Campus
- Digital solutions & support
- Visibility and focus on relationships
- MS Teams community
- In-depth training
- Detailed support documentation
- In-app guidance

**Facilitate Interactions**
- Build solid relationships with constituents
- Organize an effective pipeline of communication & meetings

**Communication Capabilities**
- Use the complete CRM for communications
- Simplify your communication outreach from one tool
READY TO JUMP IN?

For groups of three or more, you can request a personalized demo at trellis.arizona.edu/get-started.

WANT TO LEARN MORE?

Visit trellis.arizona.edu/events to register for product specific overviews or a Trellis CRM Overview.