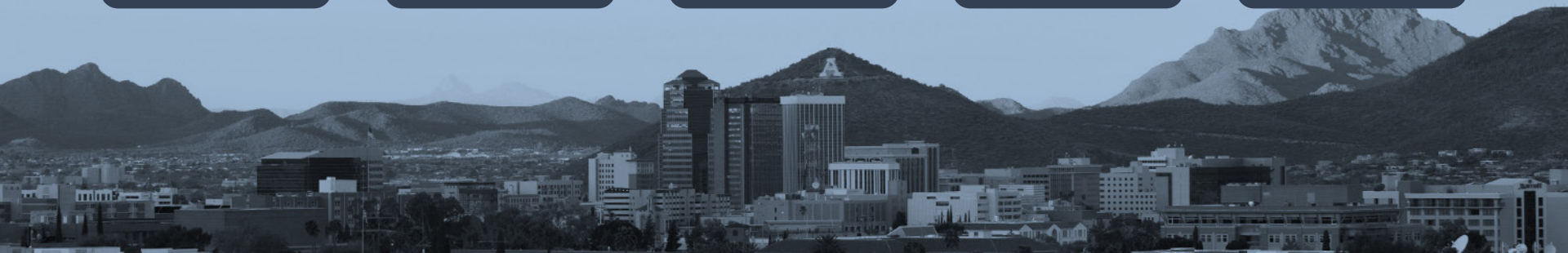
Trellis

CONSTITUENT RELATIONSHIP MANAGEMENT

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

- COMMUNICATION
- REPORTING
- PLANNING
- MANAGEMENT
- SUPPORT



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CONSTITUENT RELATIONSHIP MANAGEMENT

- Leads
- Opportunities
- Business Organizations
- Internal/External Contact Records

Constituent Ecosystem

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

Shared Platform

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

Pipeline Creation

CRM

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.

CRM Support & Solutions

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

Management

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

Communication Capabilities

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

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

Trellis

EXTERNAL PARTNERS

- Leads
- Opportunities
- Business Organizations
- Internal/External Contact Records

Constituent Ecosystem

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

Multiple Connection Points

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

Pipeline Creation

External Partners

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.

CRM Support & Solutions

- Connected Campus
- Digital solutions & support
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Management

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- In-depth training
- Detailed support documentation
- In-app guidance

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

Communication Capabilities

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- Rapidly launch many forms of communications
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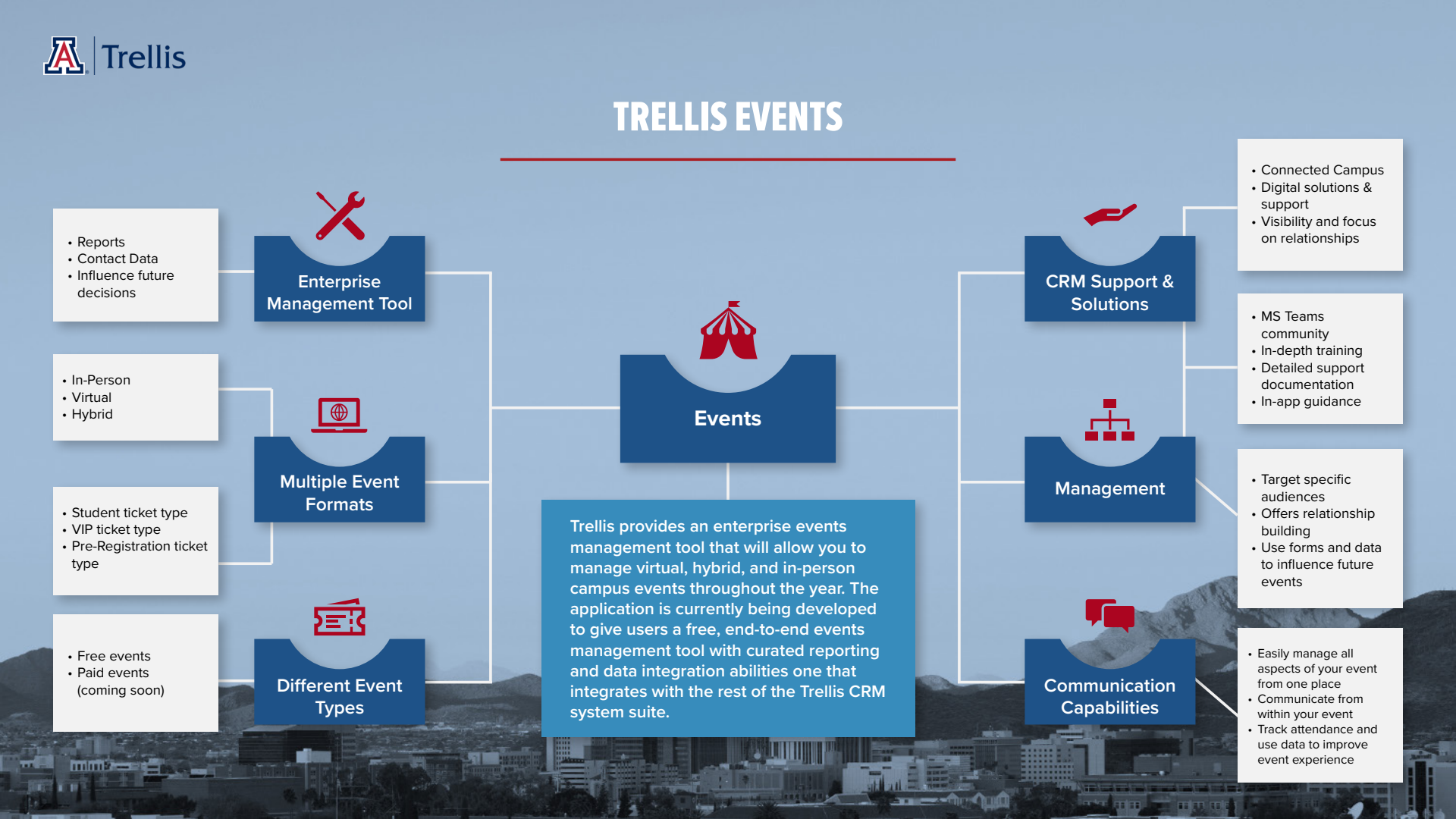
TRELLIS EVENTS



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CATCLOUD

- View course assignments & materials
- Manage classes, meetings and due dates

Time & Course Management

- Connect to D2L
- Manage assignments
- Calendar your course requirements

LMS Integration

- View Grades
- Connect with faculty and staff
- CatCash, meal swipes and customized user experience

Appointment Scheduling

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

CatCloud

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.

CRM Support & Solutions

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

Case Details

- Trained staff to troubleshoot
- Connect with the Trellis team for issues or enhancements

Communication & Dashboards

- 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

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GROUP COMMUNICATION

- Use branded or un-branded premade templates
- Draft your email to your needs all from one place
- Schedule a send or send on behalf of someone else with ease

Easily Build & Design

- Not ideal for duplication or multiple sends
- Target your audience
- Transactional Sends

One-Time Sends

- Strategize your send with precision & ease
- Access real-time contact information

- Strategize future sends
- View reports and data on emails sent

Summarized Data

Group Communication

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.

CRM Support & Solutions

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

Campaign & List Management

- Trained staff to troubleshoot
- Connect with the Trellis team for issues or enhancements

- Relationship building
- Use data to influence future sends

Communication Capabilities

- Use the complete CRM for communications
- Simplify communication outreach from one tool

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TRELLIS MARKETING CLOUD

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

Content Builder

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

Reporting & Data

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

Specialized Classifications

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

Marketing Cloud

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.

CRM Support & Solutions

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

Campaign & List Management

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

Communication & Dashboards

- 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

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TRELLIS SERVICE MANAGEMENT

Service

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.

Service Case Management

- Integrated in CRM system
- Access real- time contact information
- Facilitates notes and details adding value to student journey

Chat & Telephone

- Online form submissions
- Create cases through chat (live or not)

- Phone integration
- Create cases from phone calls
- Multi-tab features for optimal student/user success

Email

- Centralized inbox for email to case
- Reporting & dashboards supporting units

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

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TRELLIS SCHEDULING

- Design a schedule of availability
- Easy to see scheduling opportunities for the end user
- Manage calendar that pushes to Outlook

Appointment Management

- From each appointment document meeting
- Design plan for each end user and organization

Documentation

- Case notes on each appointment for easy tracking and organization
- Reporting and dashboards supporting units

Case Notes

Scheduling

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.

CRM Support & Solutions

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

Facilitate Interactions

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

Communication Capabilities

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

- Use the complete CRM for communications
- Simplify your communication outreach from one tool

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TRELLIS PROGRAM MANAGEMENT

- Handle a variety of student, employee, & community use cases
- Auto-populate step-by-step plans related to a program

Manage Programs

- Build stronger relationships with constituents
- Organize an effective participant pipeline

Facilitate Interactions

- Identify affiliated university or external contacts who contribute to a program
- Assign mentor relationships

Identify Relationships

Program Management

Program Management is the Trellis solution to promote, track and assess engagement experiences while participating in University affiliated program(s). This includes research, leadership, social impact, clubs, and organizations.

CRM Support & Solutions

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

Reporting & Dashboards

- Easily manage all aspects of participant lifecycle from one place
- Summarized data for cohorts

Communication Capabilities

- Use the complete CRM for communications
- Simplify your communication outreach from one tool

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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.