Initial CRM Tools, Debuting This Summer, Focus on Student Success

University Information Technology Services
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How many emails does a student get in a day? Too many, when you ask them, which makes it hard to sift out critical messages about their academic progress from the noise.

This is just one of the reasons that Pillar 5 of the University's strategic plan includes implementing a constituent relationship management platform as an organizational strategy.

During the fall semester, the UA selected Salesforce as technology platform for the CRM, which will focus on enabling shared processes and information across the University. With a more holistic view of strategic relationships, colleges and departments can optimize the experiences of students, faculty members, donors or alumni.

Development began in January, which included meetings with departments to learn about their constituent relations needs. The first two services, focused on student success, are planned to debut this summer.

The CRM, which has been named Trellis, will support many of the goals within the strategic plans, nearly all of which involve the University's relationships.

"Trellis is an important enabler for many of the initiatives stemming from the plan," said Jane Hunter, vice president for strategic initiatives.

The College of Agriculture and Life Sciences sees numerous ways in which Trellis can help students. "Just imagine the multiple offices and systems that a student interacts with to enroll and register for classes," said Jeff Ratje, the college's associate vice president for finance and administration operations. "Trellis holds the promise of connecting campus through collaborative processes and shared data, which will provide a more consistent experience for our students."

Student Success Services

One Trellis tool, called Early Progress Reports, can be used to reach out to students about their class performance. The idea is to give them the timely information about whether they are progressing or need to take action, such as meeting with the instructor, getting tutoring or withdrawing before they harm their GPA.

The College of Social and Behavioral Sciences is looking forward to Early Progress Reports and the broader CRM initiative to bring together advisers, faculty and other staff in support of their students, says Rachael Ronald, the college's senior director of academic advising and student engagement.
"With these tools, we can thoughtfully coordinate timely communications and interventions to our students who may need it most," she said.

Another tool, called Trellis Advise, will play a key role in the "One Team, One Dream" initiative.

"Our goal is to help students successfully navigate the transition to college life, succeed academically, and graduate in a timely fashion," Hunter said. "Trellis Advise enables a better understanding of students' advising history, allowing advisers to provide higher quality support to students."

**Future Plans**

Once these two services are launched, development will continue for a total of three years.

**Darcy Van Patten**, executive director of student and academic technologies at University Information Technology Services, is leading the Trellis CRM team. "The goal is to make as many systems as possible available to the campus community in that time frame," she said. "And with that experience, we'll create a mature model for continued development and launch of Salesforce modules."

Once implemented, she added, Trellis won't be "a golden ticket to solve all our problems, and it's not going to replace all our current tools. But it will support us in communicating more effectively and more personally with our constituents."

Ratje recommends getting involved with Trellis not just for the solution, but for the process.

"We aren't just discovering today's needs, we are envisioning our future potential and how it can become a reality," he said.

**Learn More at Open Forums**

UA employees are invited to learn more about constituent relationship management, and what it can do for their areas, by attending a Trellis CRM forum [4]. The forums are an opportunity to ask questions and talk with a member of the team.

Registration is available for June 11 and June 24 forums, with more to be scheduled.

Colleges and departments interested in exploring their relationships and processes, and how Trellis might support them, can request a Listening Tour session [5].

Visit trellis.arizona.edu [6] for more information about the CRM initiative or to subscribe to an email newsletter for updates.

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