The University of Arizona has launched a Constituent Relationship Management (CRM) initiative, a key component of the UA Strategic Plan [1], which will enable the University to achieve its bold vision and goals for the Fourth Industrial Revolution.

CRM is an organizational strategy, supported by software technology, to manage relationships, and the data and information associated with them. The University of Arizona is adopting CRM to increase information sharing across campus, and connect more effectively with its people.

The UA-branded CRM program, Trellis [2], aims to support and strengthen the University's relationships by providing a 360-degree comprehensive view of constituents to deliver a modern, more personalized digital experience. Powered by Salesforce, Trellis has the ability to strategically advance the University in many areas including student success, advising, and engagement; marketing and communications; alumni relations; community and government relations; and more.

A large number of higher education institutions, including many UA peers, have implemented a CRM strategy to increase collaboration and bring together information into a single system of record. The Trellis team has been working with other universities that have already implemented CRM to benefit from lessons learned for an improved implementation process at the University of Arizona.

The initial Trellis implementation is fast paced, and long term with a three-year timeline. The Trellis CRM team has been operating since January 2019 to establish foundational technology infrastructure, engage with key program stakeholders, and develop initial software prototypes. To align with the UA Strategic Plan’s focus on student success, the first two software solutions being implemented are Academic Advising Appointments and Early Progress Reports. Both solutions are scheduled to go-live during the fall 2019 academic semester.

Several cross-campus governance groups are providing guidance on various aspects of Trellis. As the governance groups and the program team learn more about campus needs, they will make decisions on the next solutions to implement.

The Trellis team is launching a Listening Tour and will be contacting academic units to schedule sessions throughout summer 2019. If your unit is interested in scheduling a listening
tour to learn more about the CRM initiative, contact the Trellis team at trellis@list.arizona.edu or visit the trellis.arizona.edu website to submit questions and sign up to receive regular electronic updates.

Source URL: https://uaatwork.arizona.edu/uannounce/university-arizona-launches-crm-strategy

Links
[1] https://strategicplan.arizona.edu/
[2] https://trellis.arizona.edu
[3] mailto:trellis@list.arizona.edu