Say hello to your neighbor.
Optimize digital experiences
Empower human interactions
The University’s Strategic Outcomes are About Relationships & Partnerships

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CRM (Constituent Relationship Management) is an organizational strategy aimed at increasing and improving interaction, outreach and engagement. The UA is adopting CRM to increase information-sharing across campus, build upon existing positive relationships across the various silos, and connect more effectively with all its constituencies. The UA-branded CRM software program, Trellis, will support and strengthen the university’s relationships by providing a comprehensive view of constituents to deliver a modern, personalized digital experience. Trellis promises to strategically advance the university in multiple areas including student success, advising and engagement, marketing and communications, alumni relations, community and government relations, and more.
Our Current State Overwhelms Students
Trellis Progress – Release in August
Salesforce Products Chosen as Core Technology
Trellis Marketing
Salesforce Marketing Cloud
1-to-1 Digital Marketing Platform
What is Marketing Cloud?

- Targeted, ‘one and done’ marketing
  - Email
  - Social
  - Text/Push
- Social listening
- Ad studio
- Multi-step marketing journeys, including task creation within service cloud
- Marketing analytics
Marketing Discovery – Key Findings

• Most teams focus on news, general engagement and events across multiple audiences

• All teams feel understaffed, and team members wear many hats

• All college teams sited student recruiting and enrollment as their number-one priority

• Most teams believed that students receive too much email, but lacking visibility may overcommunicate

• Alumni listservs are largely created from Razor’s Edge extracts. Infrequent refresh leads to data quality issues

• Several teams acknowledged a likely need for communication governance

• Teams have a desire for email personalization and targeting, but don’t have the necessary content, technology and human capacity
Marketing Discovery – Implications for Trellis

- Offer tiered options for technology adoption suitable to each team’s needs and readiness
- Assess value of skills cultivation or capacity development to expand adoption of segmentation and marketing automation
- Consider offering shared talent for marketing and communications at UA
- Use adoption of a shared toolset as a motivator for expanding UA’s collaboration framework for marketing and communications
- Develop marketing and communication norms, and mature these practices toward governance over time
Salesforce Marketing Cloud Demonstration

Jeremy Bunch, Salesforce.org
Major Takeaways:
2019 HED Digital Marketer Report

- 14
  Different HED depts represented

- 43%
  Director level and above

- 50%
  More than 10 years of marketing experience

- 74%
  Came from outside HED before current role

- 10%
  Consider their marketing “high performing”

- +57%
  Measuring ROI is their biggest challenge

- +89%
  Engaging across different channels is very important

- +59%
  Improving channel engagement is a top priority

- +85%
  Collaborate with at least 3 other marketing depts

- +78%
  Currently or are in the process of unifying or sharing data

- +45%
  Share a CRM

- +19%
  Share a marketing automation platform
Colorado Transforms Communication Across Campuses

“We should be making it easy for students to focus on their education. Salesforce is helping us do that.”

Ken McConnellogue, Vice President for Communication

4 Campuses unified with Salesforce

**PRODUCTS USED**

Marketing Cloud

**CHALLENGE**

Wanted to centralize their use of communications platforms across four campuses.

**SOLUTIONS**

Launched Salesforce as part of a system-wide effort to optimize communication across 4 campuses.

Marketing Cloud provides unified communications platform for over 300 communicators in dozens of offices & departments.

**RESULTS**

CRM integration to Marketing Cloud enables personalized, data-driven communications.
Intent on finding new ways to personalize the experience for alumni, donors and other constituents. Boston College knew that these individuals are most engaged with the causes, efforts, etc. relating to the college but maybe not with the university individually. The college used these attributes to better personalize their fundraising prospecting.

The Advancement team is also using Audience Builder powered by Predictive Intelligence to amplify their ability to track interests and reach out to constituents in highly personalized ways.

PRODUCTS USED
- Marketing Cloud
- Email Studio
- Journey Builder
- Audience Builder
- Einstein Predictive Intelligence
Yale Standardizes Student and Community Engagement on the Salesforce Marketing Platform

**CHALLENGE**
- Replacing a legacy tool developed in .NET, with broad needs.
- No standardized branding templates available.
- Only segmentation came from SIS.
- 150 subscription lists to choose from.
- 16k email sends, 32% open rate.

**SOLUTIONS**
- Selected Salesforce as university-wide Marketing Platform.
- Implemented robust support model with 2 FT staff members.
- Consolidated Business Units.
- Customized tool according to needs.

**RESULTS**
- Adoption for 850 Users across 200 Departments.
- 483 Templates to 8 accessible Templates.
- 721 lists to 5,000 Data Extensions.
- 148 to 284 subscription lists.
- 40% open rates even with higher send volume.
- Deliverability increased.

**PRODUCTS USED**
- Marketing Cloud
- Salesforce CRM

Yale University

2017

17K Students
Next Steps
Introducing
Trellis Marketing Product Manager
Cindy Rupp Valdez
Next Steps – Marketing Cloud Implementation Team

1. John Denker (co-chair) – Associate Vice President, Marketing and Brand Management
2. Darcy Van Patten (co-chair) – Executive Director, Trellis
3. Cindy Rupp Valdez – Trellis Marketing Product Manager
4. Barret Baffert – Director, Digital Marketing, Marketing and Brand Management
5. Christie Harper - Associate Vice President, Enrollment Marketing and Communication
6. Sabre Sarnataro – Director, Digital Marketing, Enrollment Management Marketing
7. Tracy Mueller – Assistant Dean, External Communications and Marketing, College of Law
8. James Francis – Senior Associate Athletic Director, Athletics
9. Sarah Beaudry – Vice President, Marketing and Communications, University of Arizona Alumni Association
10. Jenna Rutschman – Director, Marketing and Communications, Social and Behavioral Sciences
11. Kelly South – Senior Director, Marketing and Communications, UITS
12. Pam Scott – Associate Vice President, External Communications
13. Mark Lane – Associate Vice President, Health Sciences Communications
14. Liz Warren-Pederson – Assistant Vice President, Marketing & Communications, Foundation
15. Dominic Rodriguez – COO, Cooperative Extension
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