



HEADQUARTERS
CLEVELAND, OH

WELCOME TO TRELLISPOINT

A guide to who we are, what we do, and
how we help you achieve growth through
Microsoft technologies.

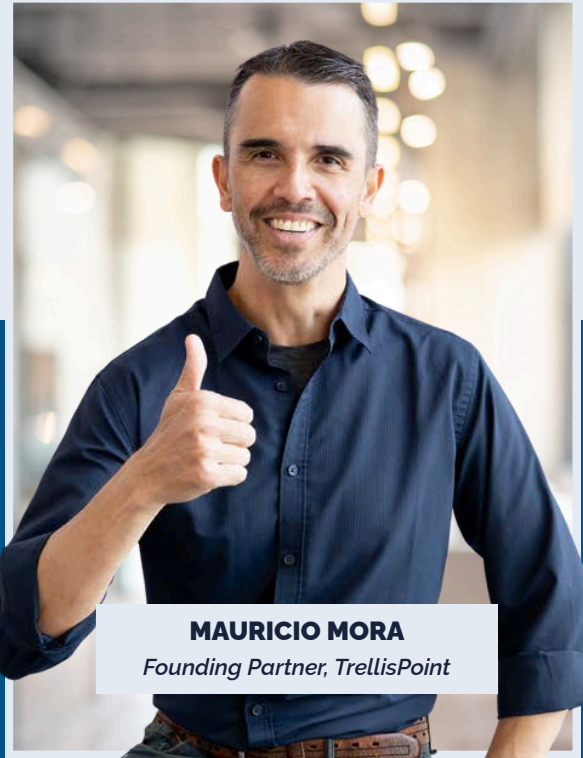


WHO WE ARE

TrellisPoint delivers Strategic Growth Consulting through Microsoft Technologies, specializing in Dynamics 365, Power Platform, Azure AI, and Copilot. We combine deep technical expertise with business strategy, helping organizations align people, processes, and data to drive measurable growth.

As a Microsoft AI Cloud Partner, we stand out by focusing on strategy and people—not just technology. Our clients are forward-thinking companies seeking a trusted partner to transform technology from a cost center into a true competitive advantage.

With more than a decade of experience and hundreds of successful implementations across industries, we've helped organizations of all sizes navigate migrations, new deployments, and complex integrations.



MAURICIO MORA
Founding Partner, TrellisPoint

Our proven frameworks ensure projects are delivered efficiently, cost-effectively, and with lasting impact. Clients trust TrellisPoint because we bring stability and clarity to complex transformation initiatives. We serve as the unifying force that connects people, process, and data—creating solutions that scale with your business.

Our approach is built on partnership. We don't just deliver technology; we help your organization evolve strategically and sustainably. That's why our clients remain with us year after year, achieving success that lasts well beyond go-live.



OUR MISSION: STRATEGIC GROWTH THROUGH MICROSOFT TECHNOLOGIES



COLLABORATION

We believe the best solutions are built together. Our teams work side by side with clients to ensure every project reflects shared goals and mutual success.

CONTINUOUS IMPROVEMENT

Progress is never static. We challenge ourselves and our clients to keep learning, refining, and evolving—because growth is a journey, not a destination.

PROBLEM-SOLVING

Every challenge is an opportunity to innovate. We approach obstacles with curiosity, creativity, and persistence until the right solution emerges.

ACCOUNTABILITY

We take ownership of every outcome. Our clients trust us because we deliver on our promises—with transparency, reliability, and integrity at every step.

OUR SOLUTIONS: **TRANSFORMING BUSINESS** **THROUGH THE MICROSOFT CLOUD**

At TrellisPoint, we help organizations achieve strategic growth through innovation and efficiency by aligning technology with business strategy for measurable outcomes. Our expertise in the Microsoft ecosystem supports ERP modernization, data-driven insights, and AI integration, ensuring lasting value from technology investments.

BUSINESS APPLICATIONS

Unify customer data and streamline operations with Dynamics 365. Our team assists businesses in deploying CRM, ERP, and service solutions to boost productivity and connect all enterprise components.

STRATEGIC CONSULTING

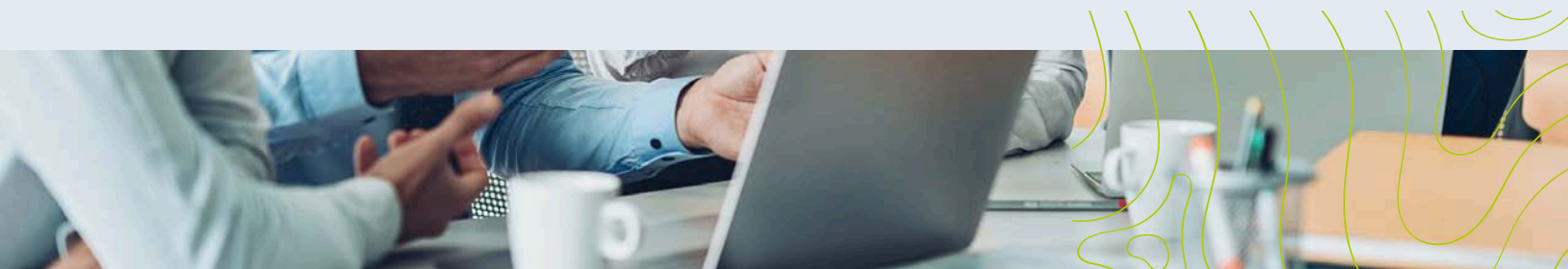
Empower your organization to evolve with purpose. Our experts align business goals with modern Microsoft Cloud strategy—helping you adapt, innovate, and stay ahead in a constantly changing digital landscape.

POWER PLATFORM & COPILOT

Accelerate innovation through low-code automation, integrated data insights, and AI tools. We assist organizations in building scalable apps, automating workflows, and enabling teams to make quicker, smarter decisions.

AZURE AI & CLOUD INTEGRATION

Modernize your business with intelligent, scalable cloud solutions. Our team helps organizations leverage Azure to connect systems, integrate data, and deploy AI-driven capabilities that enhance performance and efficiency across the enterprise.



OUR APPROACH: TECHNOLOGY SHOULD SUPPORT STRATEGY—NOT DEFINE IT.

Every engagement at TrellisPoint begins with understanding your business—not just your technology. We take a discovery-first approach to identify the goals, challenges, and opportunities that drive your organization. From there, we design solutions that fit your unique needs rather than forcing your business to adapt to software. Our process is built on collaboration, measurable outcomes, and knowledge transfer—ensuring your team is empowered long after implementation.

**START WITH
UNDERSTANDING
YOUR BUSINESS
GOALS**

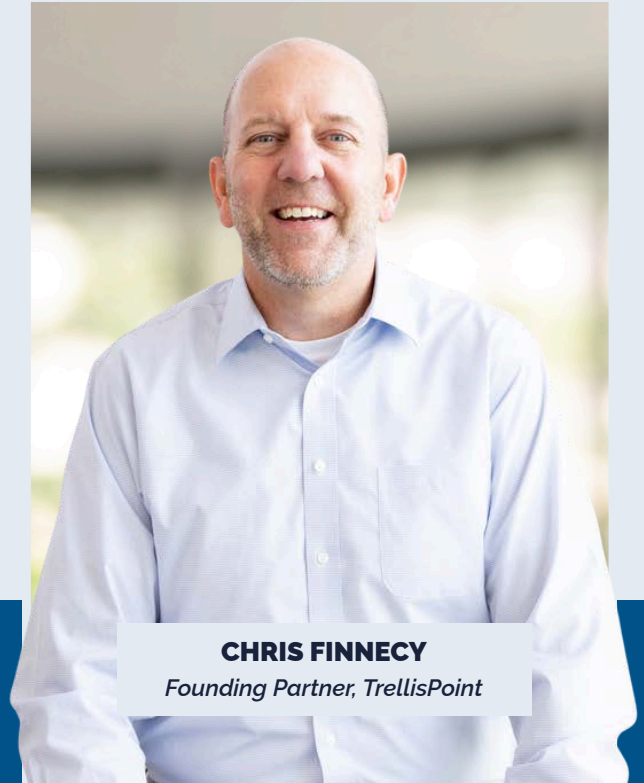
**BUILD SOLUTIONS
THAT FIT, NOT
FORCE-FIT**

**DELIVER
MEASURABLE
OUTCOMES**

**EMPOWER YOUR
TEAM THROUGH
KNOWLEDGE
TRANSFER**

WHAT IT'S LIKE TO WORK WITH US

At TrellisPoint, we believe great results come from collaboration and trust. Our clients work directly with experienced consultants who communicate openly, respond quickly, and stay focused on shared success. We operate as an extension of your team—committed to delivering results, not surprises.



CHRIS FINNEY
Founding Partner, TrellisPoint



DEDICATED TEAM

You'll partner directly with senior consultants and project managers who understand your business and stay engaged from strategy through delivery.



TRANSPARENT PROCESS

Expect clear timelines, proactive communication, and regular check-ins so you always know where your project stands and what comes next.



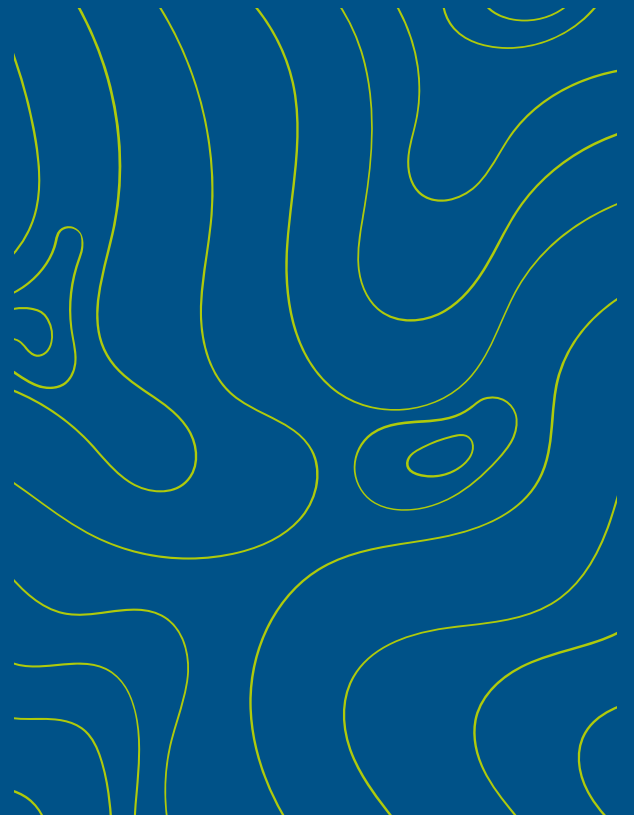
FLEXIBLE ENGAGEMENTS

Whether you need a short discovery session or ongoing managed support, we tailor every engagement to fit your goals, resources, and timeline.



SUPPORT WHEN YOU NEED IT

Our relationship doesn't end at go-live. Our support team is here to assist with questions, enhancements, or training—ensuring your solution continues to deliver value as your business evolves.



STAY IN TOUCH WITH US!



TrellisPoint.com



Sales@TrellisPoint.com



(888) 719-0248