

DECEMBER 3, 2024



Technology Model

Technology Modernization Strategy

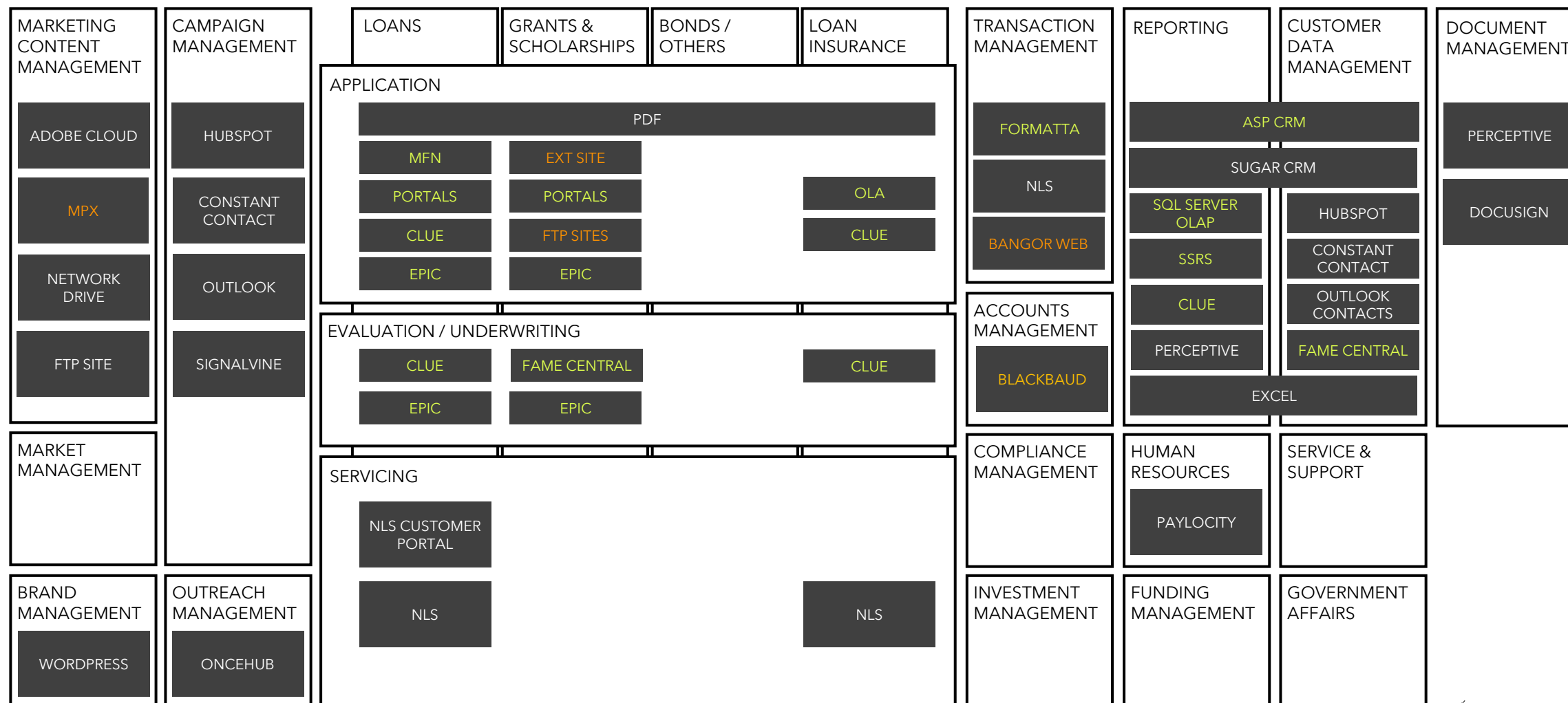
Contents

Technology Model

- **Current State Observations**
- **Target State Recommendations**
- **Gap Heatmap**

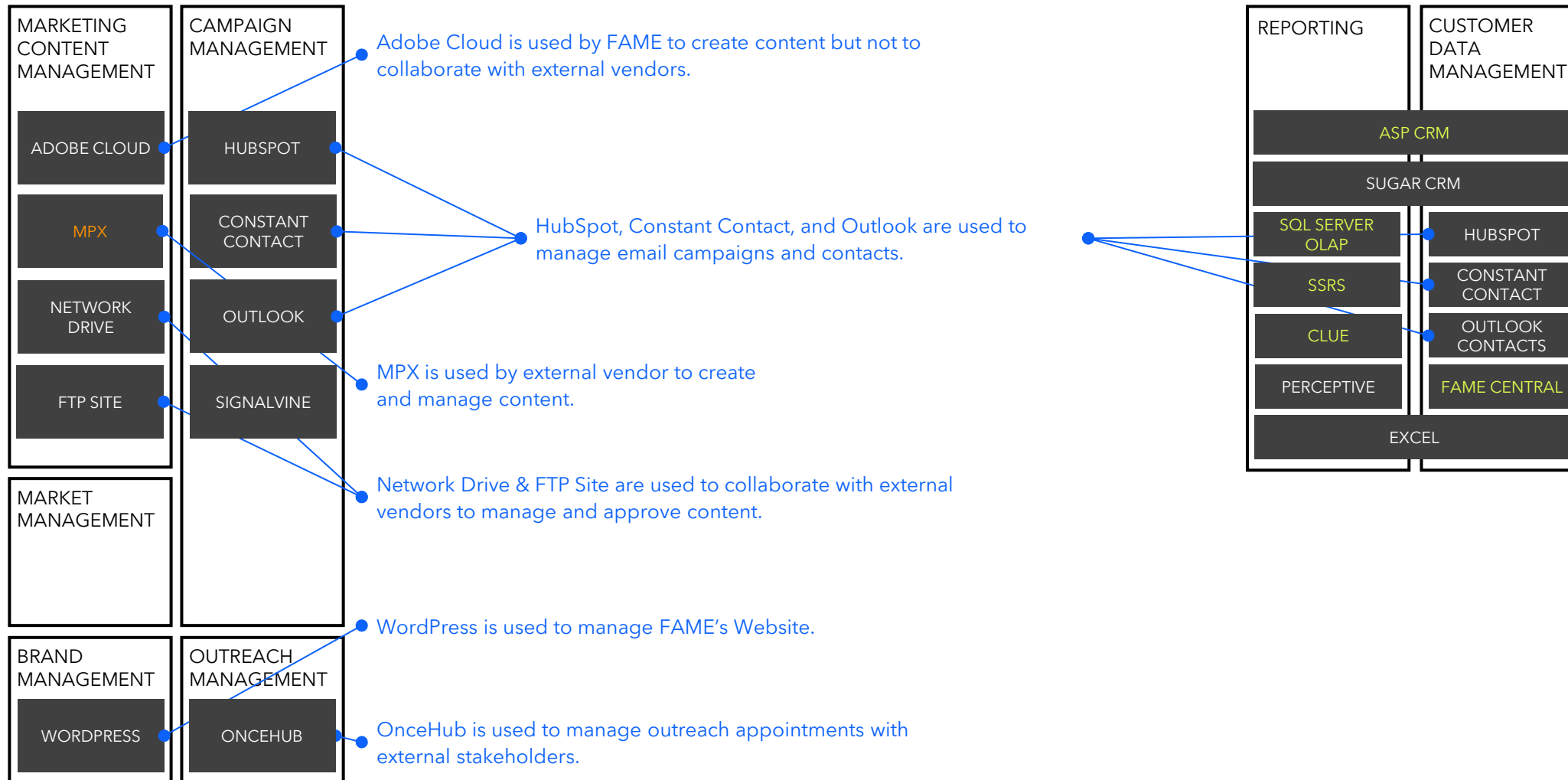
FAME Technology Model (Current State)

Multiple non-integrated platforms are used today to accomplish similar tasks.



Business Development & Outreach (Current Technologies)

Multiple non-integrated platforms are used today to accomplish similar tasks.



*Recommended tools and integration between these tools should be confirmed based on use cases during the early phases of transformation.

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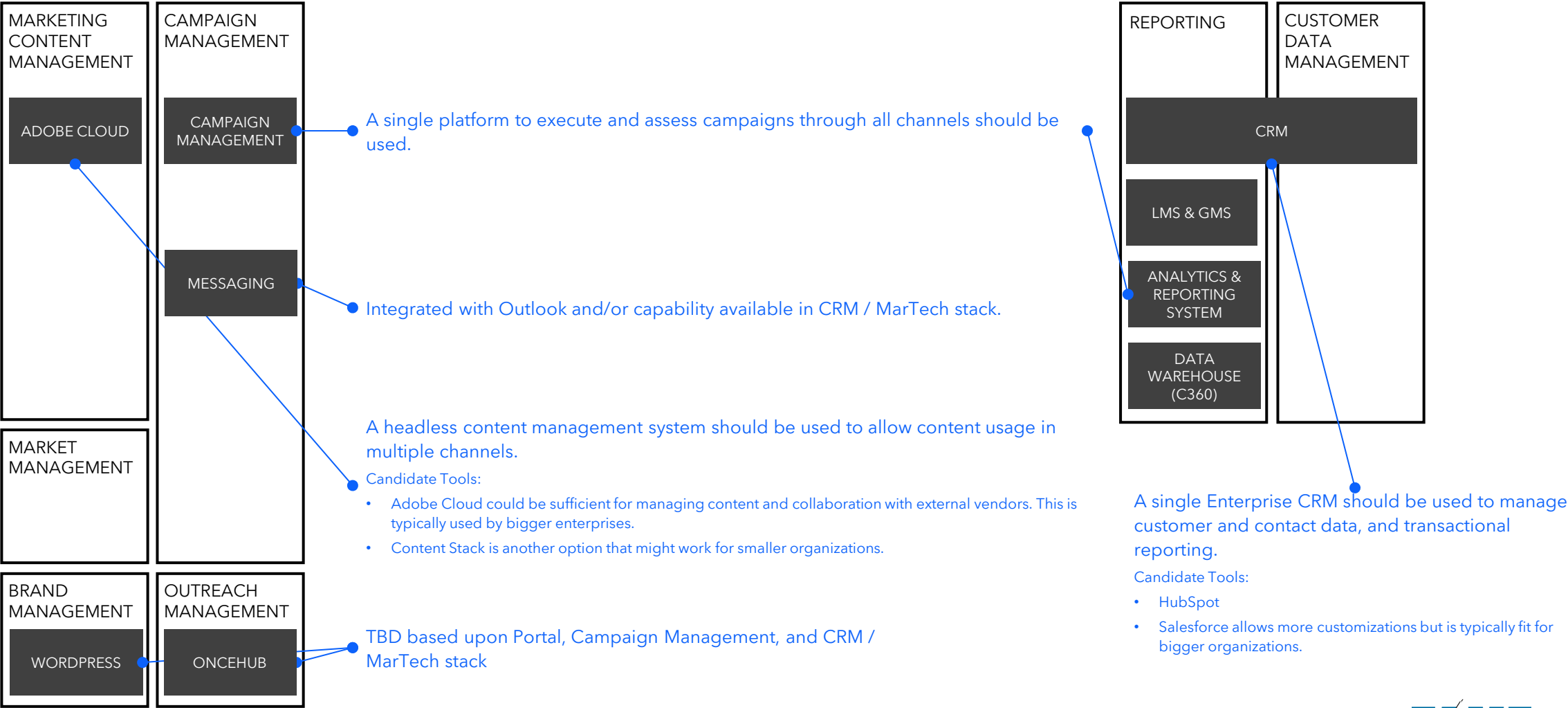
EXTERNAL

PURCHASED

CUSTOM

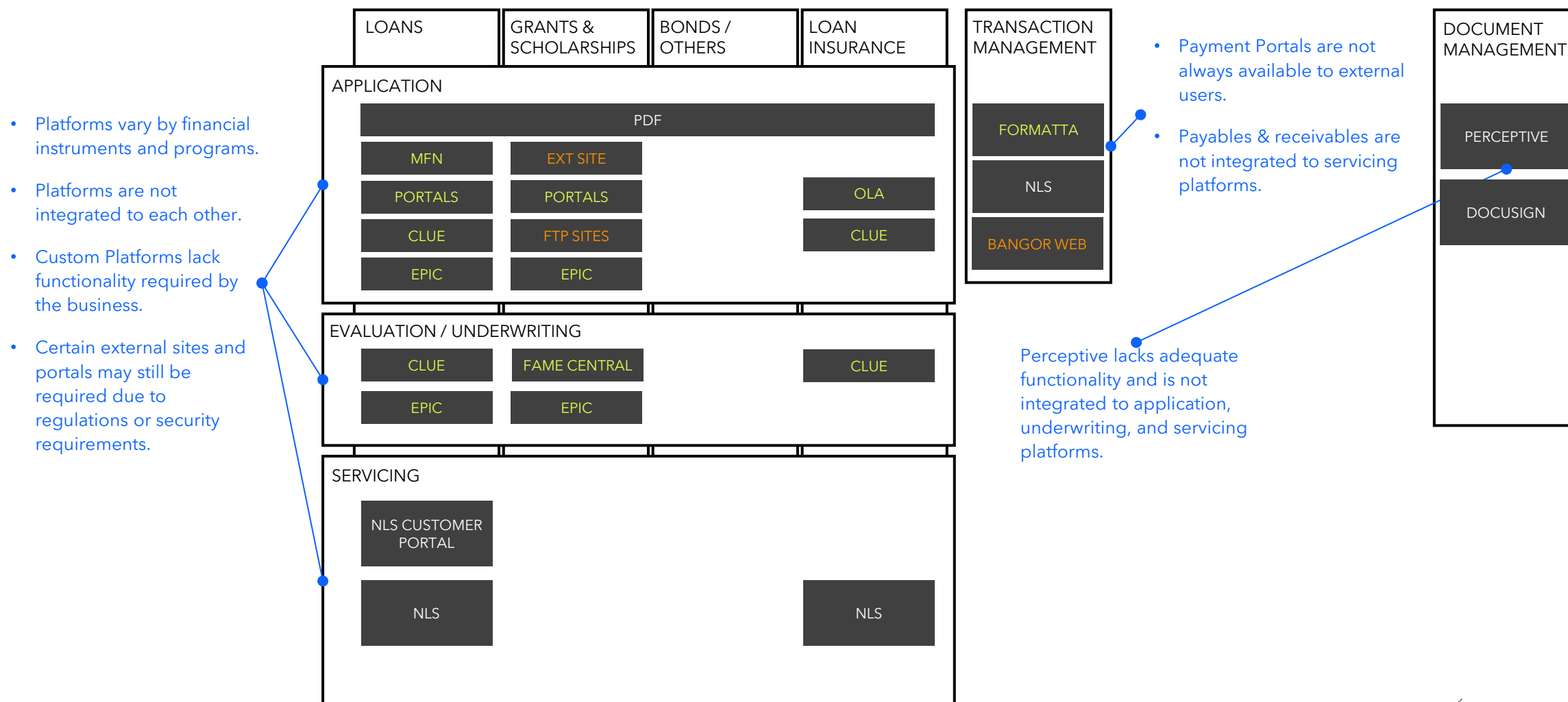
Business Development & Outreach (Recommendations)

Rationalize & integrate platforms for seamless collaboration and effective campaigns.



Commercial and Education (Current Tech)

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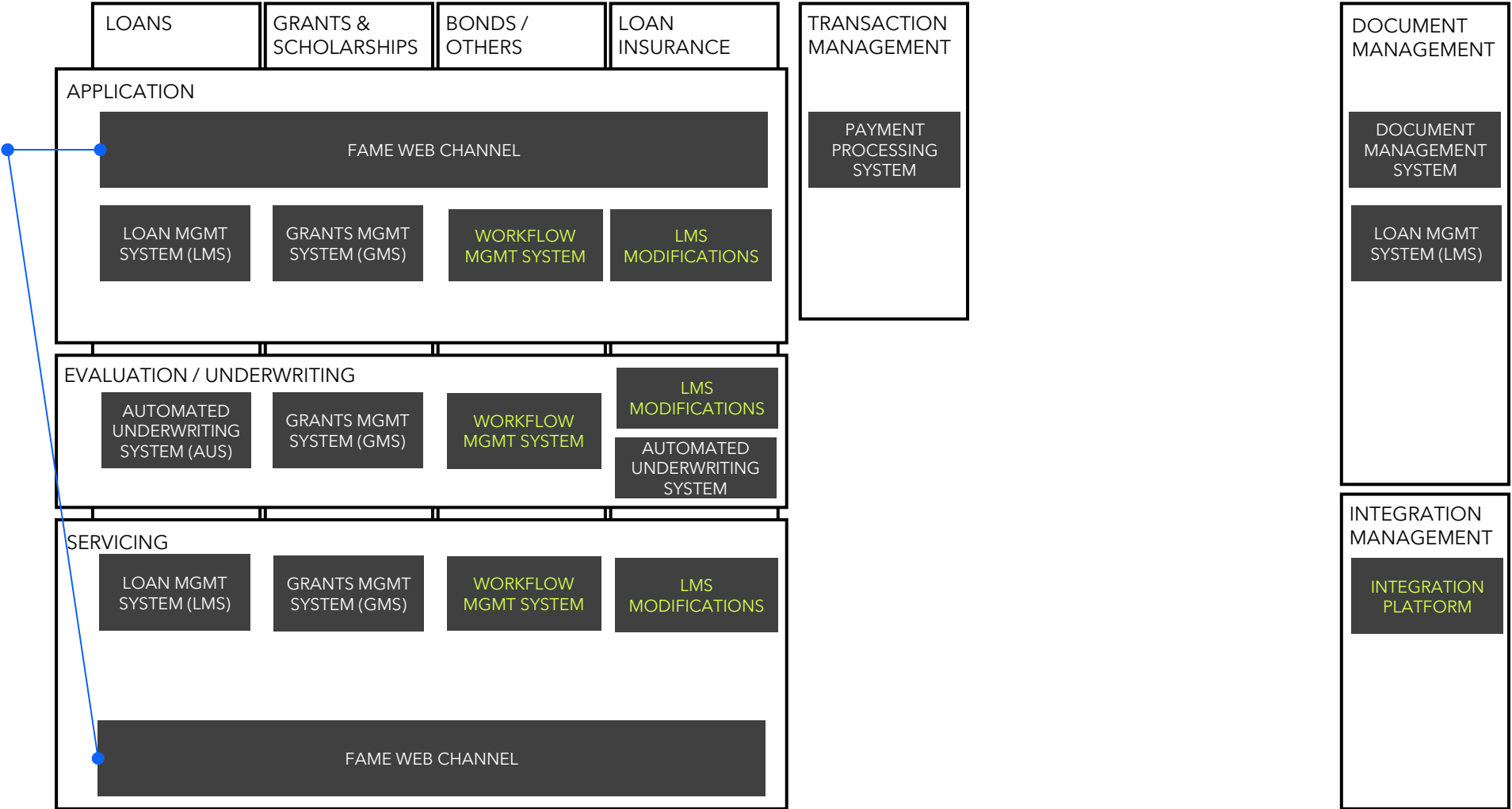
PURCHASED

CUSTOM

Commercial and Education (Recommendations)

Rationalize & integrate platforms for seamless collaboration with internal & external stakeholders.

Leverage core platform web capabilities integrated into a consolidated external facing web channel to manage applications and accounts for all financial instruments and programs.



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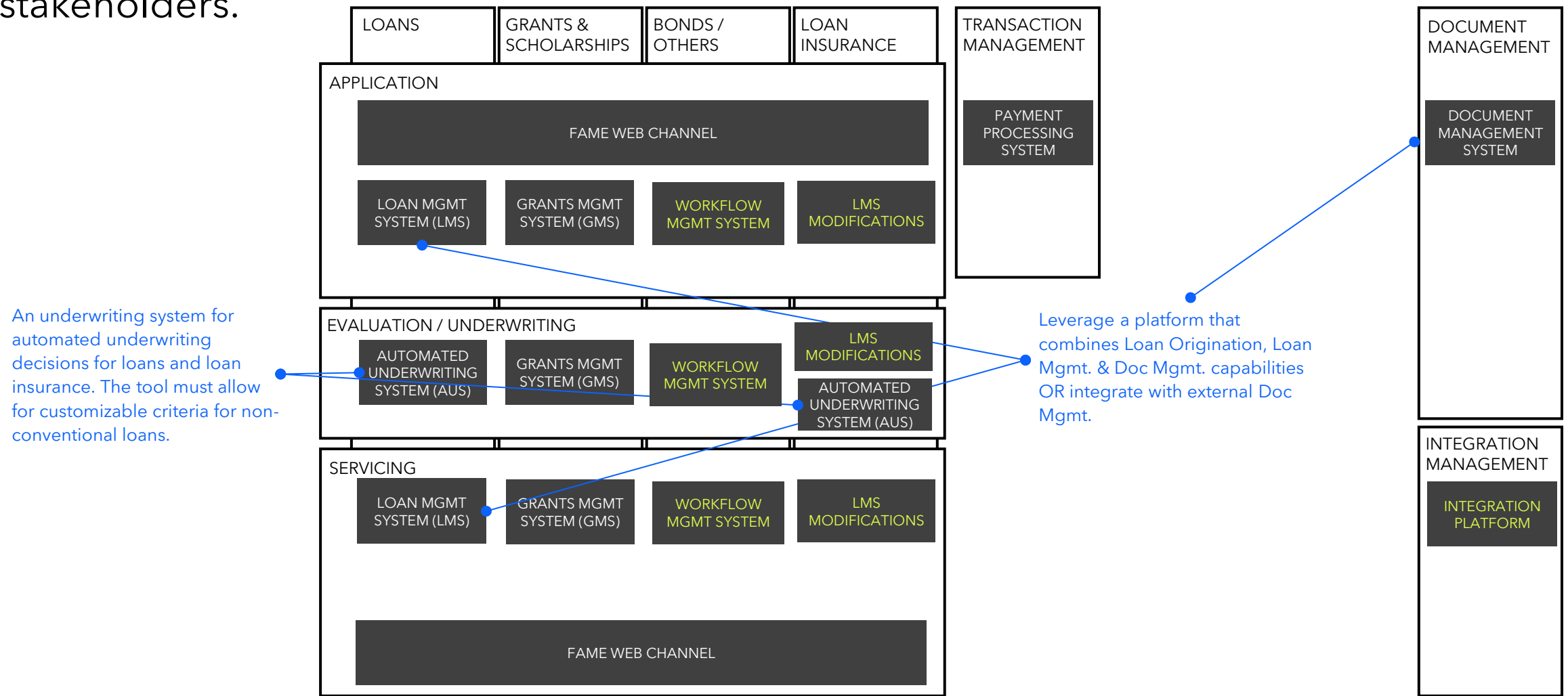
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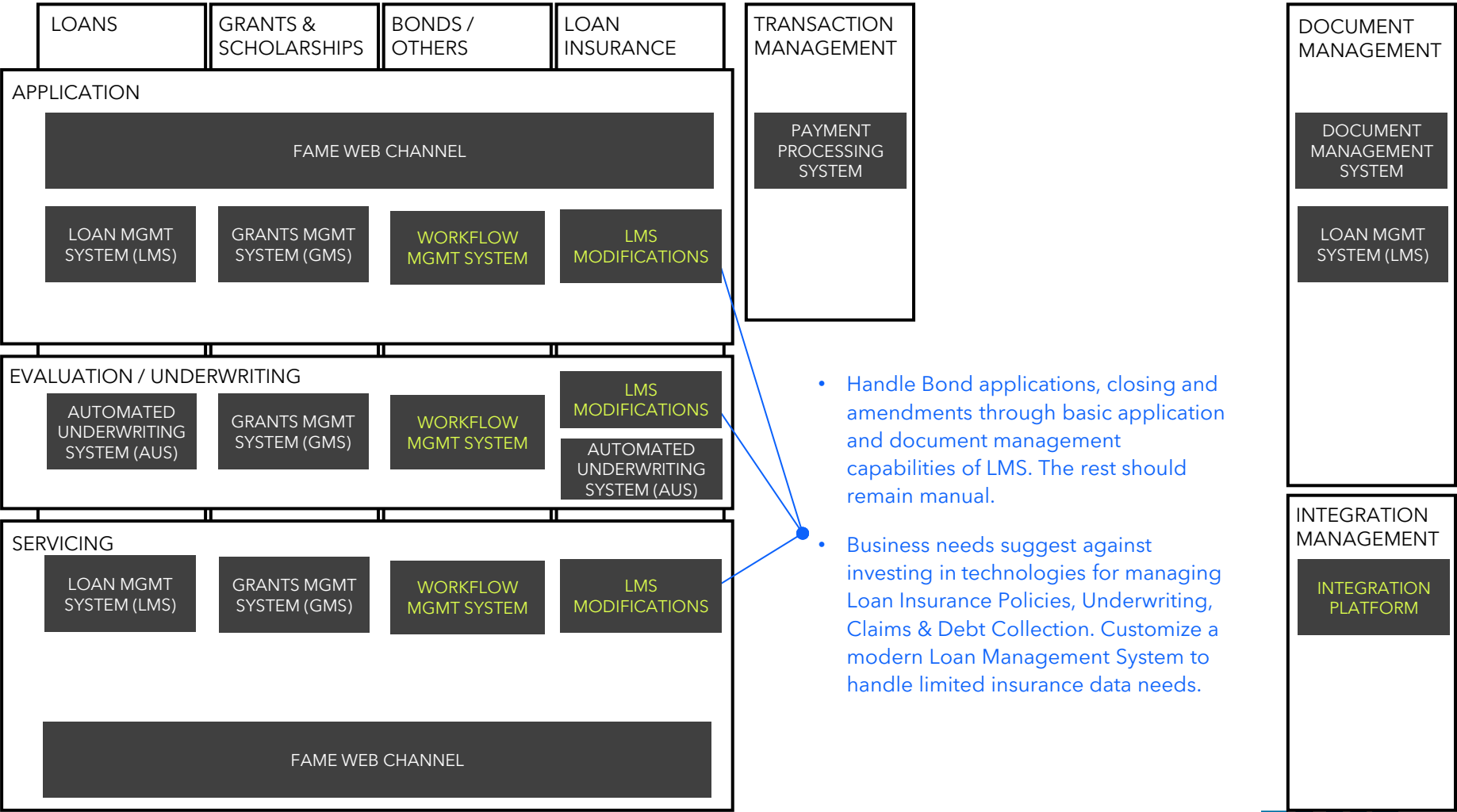
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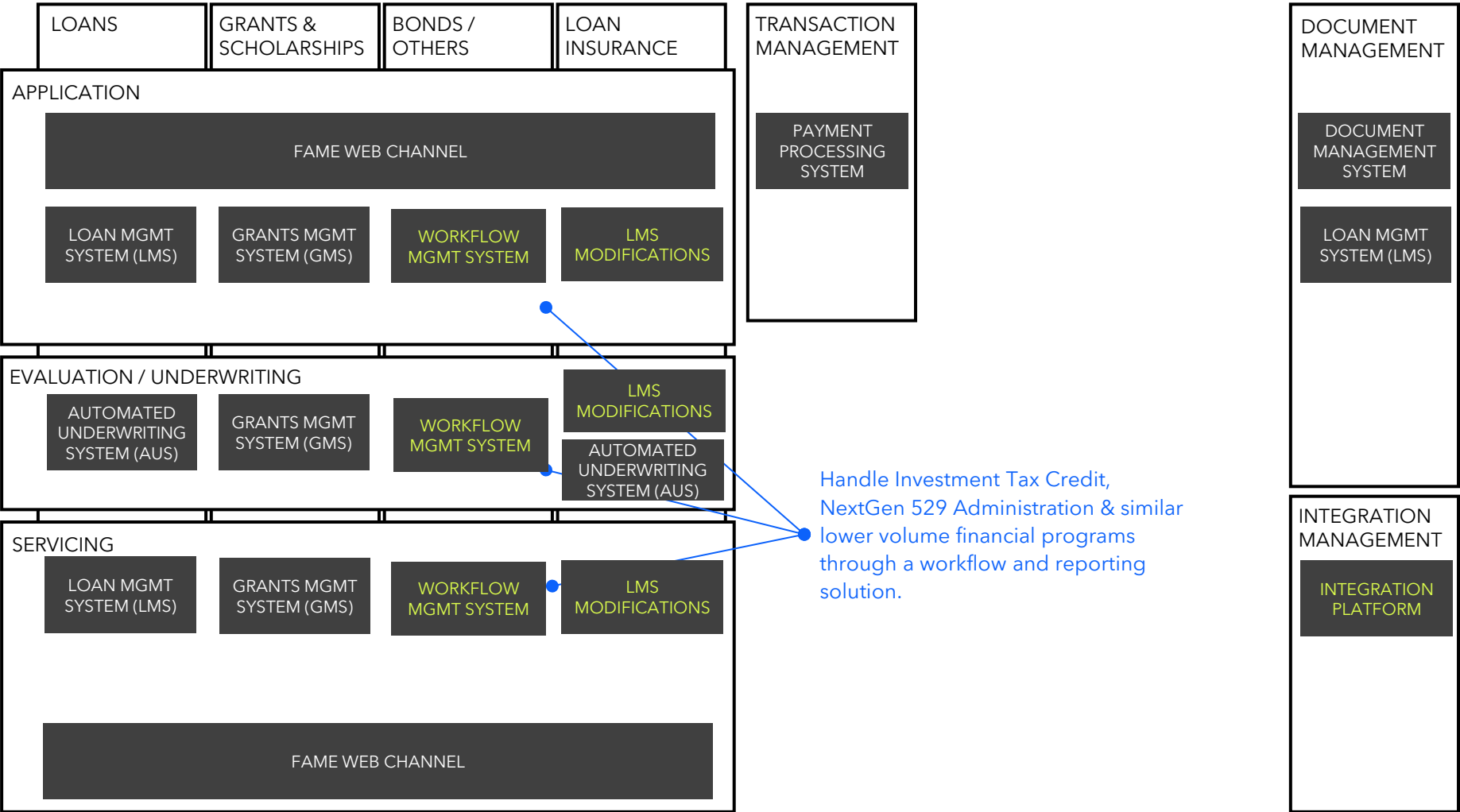
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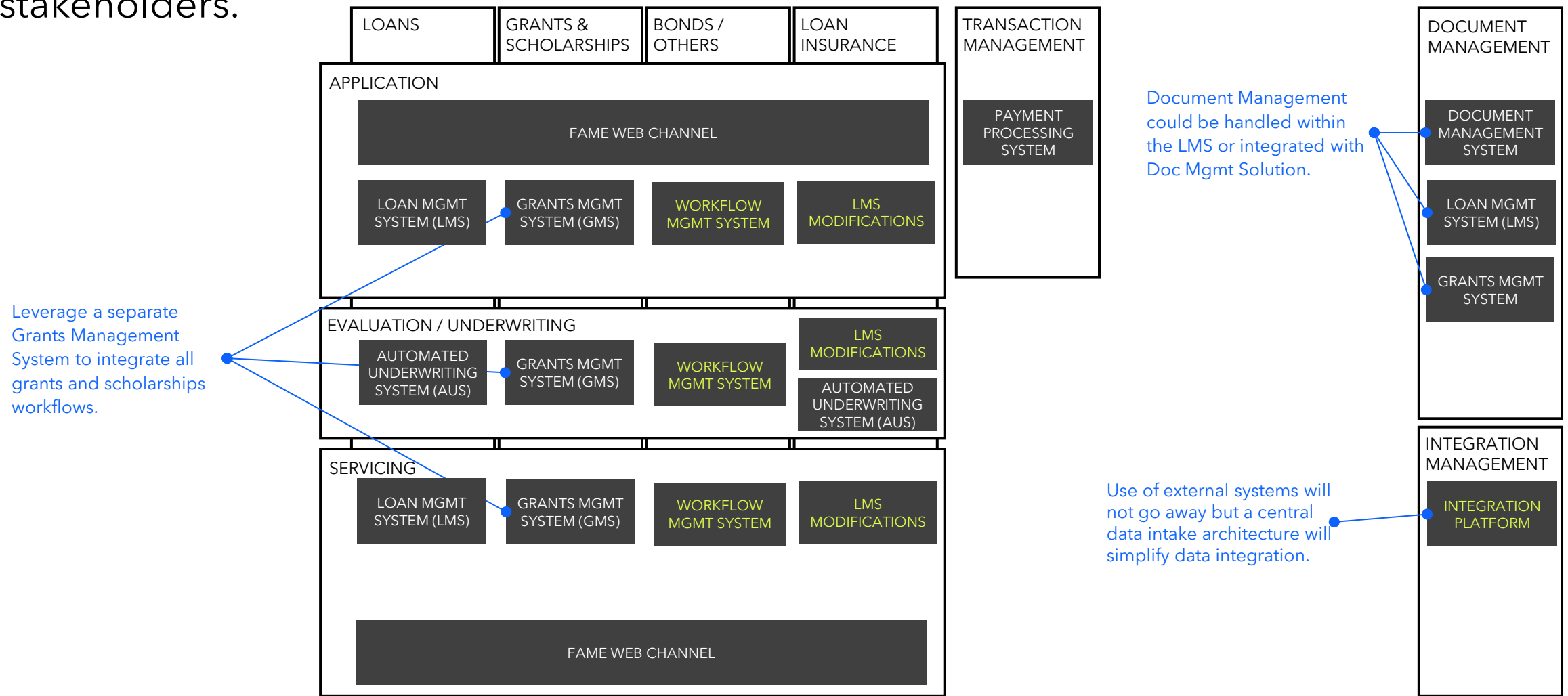
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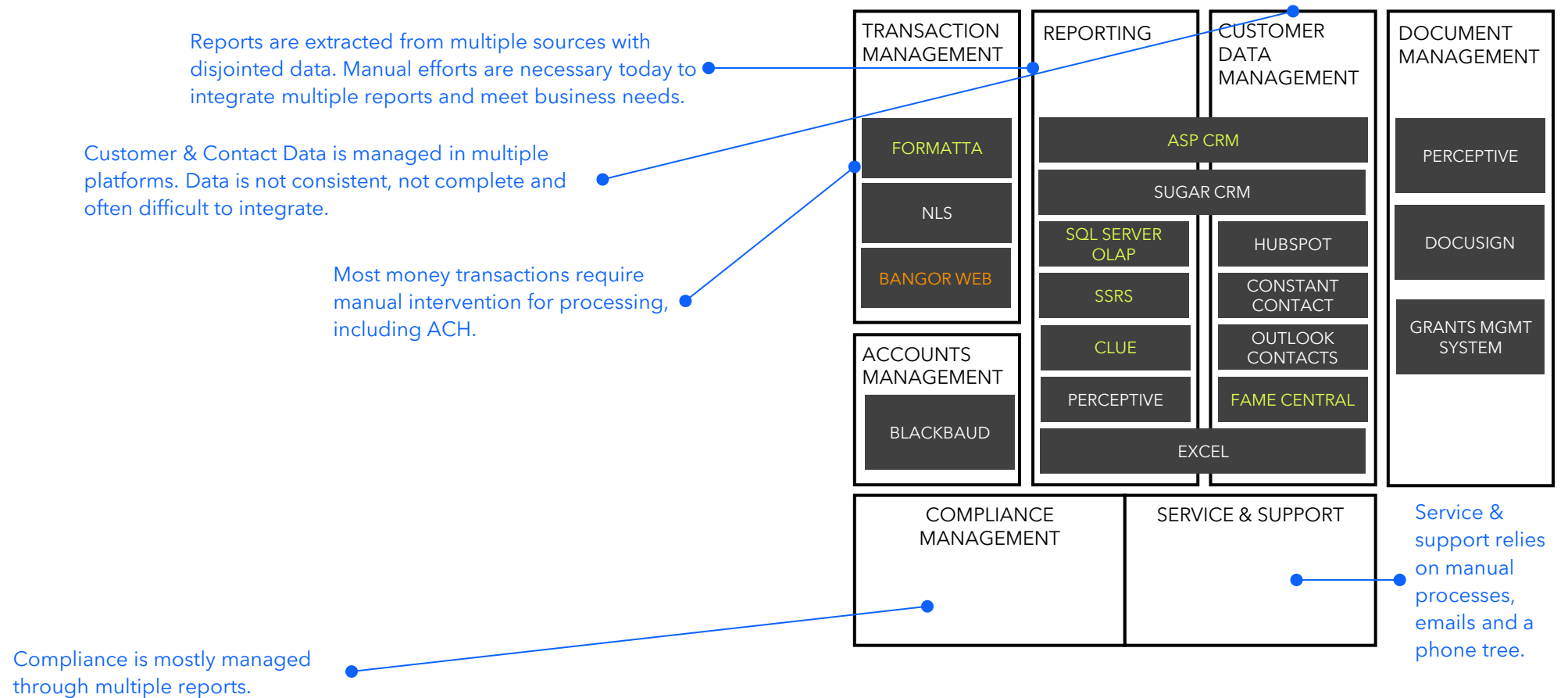
Commercial and Education (Recommendations)

Rationalize & integrate platforms for seamless collaboration with internal & external stakeholders.



Finance and Common (Current Tech)

Multiple non-integrated platforms are used today to accomplish similar tasks.



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PURCHASED

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Finance and Common (Recommendations)

Rationalize & integrate platforms for seamless collaboration with internal & external stakeholders.

A single Enterprise CRM should be used to manage customer and contact data, and transactional reporting.
Candidate Tools:

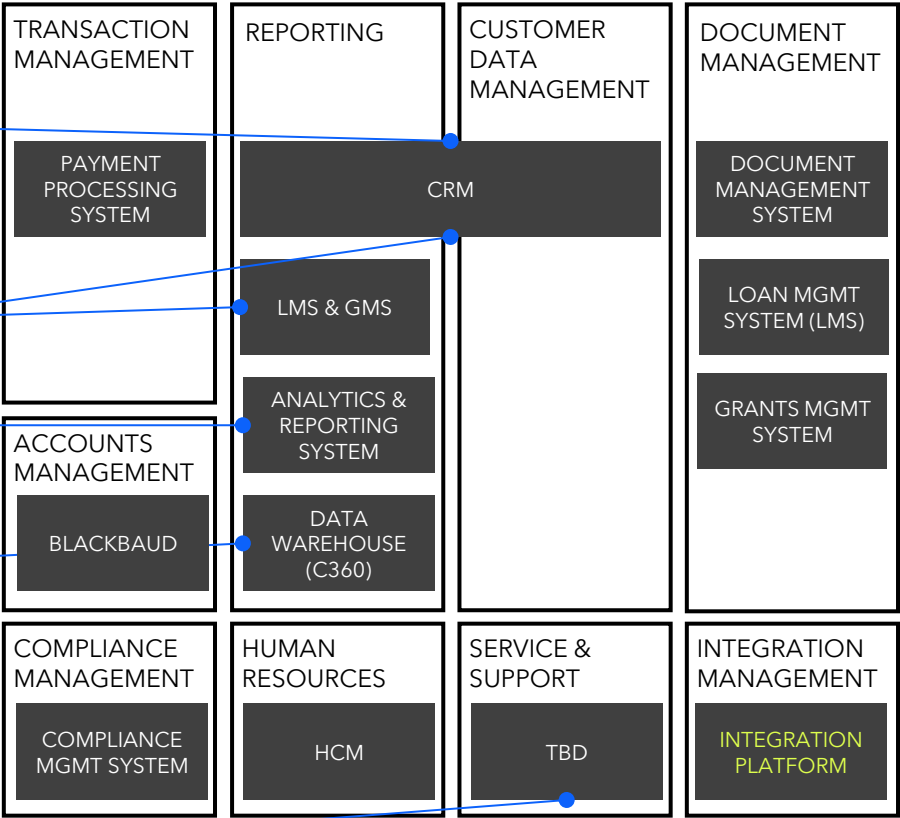
- HubSpot
- Salesforce
- MS Dynamics

Leverage a single platform to access analytical reports and present integrated data from multiple trust sources.

Leverage a Data Warehouse to handle additional operational reporting needs and to implement a Customer 360 view.

Adopt a platform to manage all support needs for internal & external stakeholders.

Transactional Reporting should be accomplished by the CRM, LMS & GMS.



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LEGEND

EXTERNAL

PURCHASED

CUSTOM

Finance and Common (Recommendations)

Rationalize & integrate platforms for seamless collaboration with internal & external stakeholders.

Integrate a payment processing system with the Servicing platforms.

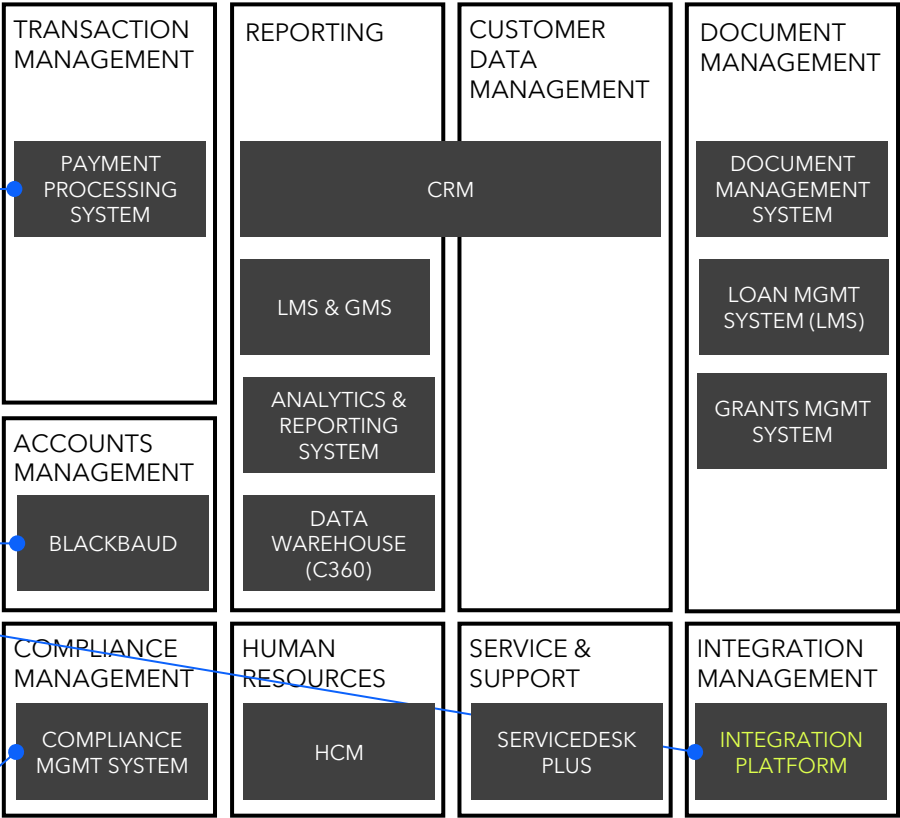
Candidate Tools:

- Stripe
- PayPal
- Plaid

Leverage an Integration Platform to manage the following business needs

1. Data Intake from external sources
2. Integration of platforms when out of the box integration is not available. Ex: Blackbaud with other platforms

Ensure all regulatory requirements are met, manage risk exposure, and track compliance with industry standards.



FAME Technology Model (Target State)

