

Enterprise Architecture Design and Implementation RFP

Marketing Scope Clarification

July 29, 2025

The purpose of this document is to refine the requirements provided in the Enterprise Architecture Design and Implementation RFP to address questions pertaining to Phase 1 Scope of Marketing requirements.

For Marketing, the goal of Phase 1 is to establish a technical vision and an initial implementation that is extensible to meet the future needs of the marketing department.

The Marketing Scope for Phase 1 consists of:

- Baseline Customer Master/CRM implementation and consolidation of Customer Data for Commercial Clients
- Data integration with Commercial Business Applications where appropriate
- Ability to manage contacts, account relationships, and interaction history
- Consent and Preference Management
- Management and execution of campaigns across channels (email, text, social, and chat channels)
- Consolidation of existing functionality performed by Constant Contact, HubSpot, and Signal Vine to “Target State” platform
- Analytics of campaign performance across channels
- Lead collection and nurturing capabilities
- Triggered communications based on customer behavior

Marketing Scope items that are desired as part of the overall transformation, but are not required capabilities to be delivered during Phase 1 (but which may be optionally included if bidder strongly believes it should be in scope) include:

- Content and Digital Access Management (including review, approval and re-use capabilities) can be addressed in a future phase
- Education contact management, integration, and analytics can be addressed in a future phase
- Marketing Project Management can be addressed in a future phase
- Event Management can be addressed in a future phase (based on the expectation that campaigns can be used to promote events, execute follow-up communications, and direct attendees to a registration function)

- Website personalization/self-service capabilities (based on expectation that enablement will be component of design deliverables)

The outcomes of this phase should provide:

- A simplified technical footprint
- Consolidated customer database
- Reduction of time spent manually compiling lists, integrating disparate data sources, producing reports, and performing analytics on marketing activities.
- A clear vision to realize the full set of marketing capabilities defined in this RFP in future phases

It is expected that bidder's responses will provide:

- A Target State Vision and platform recommendations that will be extensible to meet the long-term marketing needs defined in the RFP (e.g. Education customers and functionality not included in Phase 1)
- Takes into consideration the Guiding Principles FAME has outlined in the RFP
- Enablement of the environment defined above for Phase 1