

Whitelabel



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Response to Request for Quote: CPC Healthcare Corporate Site

Prepared For:
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CPC Healthcare

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Response to Request for Proposal: CPC Healthcare Corporate

Understanding of the Situation

CPC Healthcare has requested a proposal from Whitelabel for the development of their corporate site. If required further information and associated costing for the ongoing support, hosting and management of the survey tool can be provided by Whitelabel's affiliate, Fort Nocs Networks.

CPC Healthcare Communications is in the planning stages of developing a strong, corporate Web presence for itself via www.cpchealthcare.com. In the short term, the main purpose of the Web site will be to act as a promotional vehicle and drive new business. As a secondary goal, the Web site will also assist with recruitment of qualified employees

This proposal includes responses and the associated quote for the development of the CPC Healthcare Corporate Site V1.0. The development piece is broken up into 'functional stories', which depict as many unique and independent units of functionality as we could determine with the existing information. Each story has the associated development time and cost included so if functionality needs to be reprioritized or eliminated, it can be done without impacting the other stories in the project estimate.

Each story will be grouped into a release. The release schedule will be designed to match the business requirements of CPC Healthcare.

Project Objective

The overall objective of the new corporate site is to develop a more robust and easily managed online corporate presence for CPC Healthcare.

CPC Healthcare wants the Web site to be built in a phased approach to facilitate speed to market. Phase 1 is quoted in detail below and will focus mainly on promoting CPC to new business and employee prospects.

Phase 2 will involve the development of a secure site(s) to be used as a sales tool, training resource to CPC employees and possibly, a client extranet to help client's track project status.

Whitelabel has taken the information gathered from discussions and from a review of the CPC Healthcare Corporate Site RFP to break-up the phase 1 project into the following 3 pieces of high-level functionality (which will be broken up into sub groups for pricing and time estimates). Also, Whitelabel has included some additional functionality and the associated costs that may be of interest to CPC Healthcare as it greatly aids with site management and administration.

Required Functionality

1. *Template Construction:* Template construction includes the assembly of graphics into working page templates for content production.

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2. *Interface Development:* The interface development section includes the building of each of the HTML pages. This also includes the development of three flash elements.
3. *Site Administration for 'Whats New' and 'Our Words':* An administration tool, accessible via a single user ID and password that will allow easy administration of the 'what's new' section of the home page and the 'our words' section. This functionality allows admin users to change the password they use to access the admin tool.
4. *Outbound Email Management for 'Keep in Touch':* Each Web-based tool in the Whitelabel TALK suite powered by Got Marketing is designed to make permission-based email marketing fast and easy. User-friendly step-by-step wizards let you create professional looking email campaigns in minutes.
 - Whitelabel will manage your list upload and the ongoing technical fulfillment of the campaign
 - Get software from a hosted Web-based environment - no software to install or maintain
 - Pay monthly or pay-as-you-go
 - Realize one-to-one marketing using targeted personalization technology - appeal to your customers using their specific attributes/buying behaviours/demographics
 - Get instant, automatic report generation
5. *Ongoing Hosting and Application Management:* Whitelabel offers a robust hosting and application management service, branded Fort Nocs Networks, which is a logical output, and next step from the development process.
 - a. *Audit and User Reporting:* The audit reporting functionality tracks all activity and changes to the site while the user reporting functionality ensures all user behaviour and site interactive is tracked, archived and available.

Business Result

From a business perspective, the engagement between CPC Healthcare Association and Whitelabel is designed to achieve the following business result

- A secure communications channel
- An application that is designed to integrated easily with future functionality
- A software application designed for easy content administration for the 'Whats New' section
- A tier one solution that exceeds customer's performance demands
- A Phase I application completed on time and on budget

Technology Result

Whitelabel will leverage its extensive understanding of the premier applications, hardware, and communications equipment for the following technology result

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- **Security:** All development keeps in mind that CPC Healthcare requires the highest level of security in anything that represents their brand.
- **Flexibility:** The CPC Healthcare Corporate Site is to be developed in consideration of future functionality that will be added in subsequent phases. All development effort will ensure new functionality components can be added easily.
- **Usability:** Both the user interface as well as the administration tools will be built to allow for ease of use, as well as content and system administration.
- **Infrastructure Reliability:** As development continues, complete selection, procurement, installation and configuration of a hardware and communications infrastructure will be required to ensure a system architecture designed for
 - High availability
 - High performance
 - Scalability and Future Growth
 - Uptime reliability

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Project Process and Methodology

Although Whitelabel staff is accustomed to the industry standard software development process; we will be using a process that draws on some elements of Extreme Programming.

- **The Customer**
The customer is defined as the expert or experts on the business. The customer is required to make all decisions surrounding the business side of the project: importance, priority, schedule and what tests define success. Basically what is required when, in what order they are needed, and what tests they have to pass to be accepted.
- **The Developer**
The developer is responsible for the 'technical' side of the project. Their primary responsibility, besides designing, coding, and unit testing, is to define time. How long each story will take to develop is a key responsibility of the developer, as is identifying any required information and dependencies. The order the stories are developed is not their responsibility. That decision is left to the customer. This ensures that the highest priority stories/functionality is delivered early in the project.
- **Stories**
The Stories are brief descriptions of required functionality. They are a starting point for discussion between the customer(s) and developer(s). They are not specs. More information is usually required for proper development of each story. This aspect of XP results in a need for a high degree of communication.
- **Timelines**
The developers investigate each story and a timeline requirement for each is derived. This will be used by the customer(s) to help decide what iteration contains each story.
- **Release**
A release is the launch to the user, or end client. It is usually a functional, fully tested application or site.
- **Iteration**
Each release consists of a series of iterations. An iteration is usually 2 to 3 weeks in duration and is delivered to the customer(s). Often, particularly in early iterations, a fully functional site or application is not ready. The highest priority stories are done first so as the iterations approach release, the less important functionality is being added. These short iterations keep the customer(s) very involved so changes to stories, priorities, timelines, and costs can be made constantly.

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Whitelabel Rate Card

Whitelabel works primarily on a time and materials model. Hourly rates plus incurred expenses.

Whitelabel charges a flat rate of \$110 CDN per hour for all Project Management, Application Development, IT/IS, Internet, and Internet property management professional services.

Cost Estimates

These cost estimates are for the release of the CPC Healthcare Corporate Site V1.0: Version 1.0. Details of the functionality to be delivered are contained in story list.

Changes to stories may take place throughout the course of development. Costs are based on \$110 per hour. CPC Healthcare will sign off all changes effecting scope, functionality, timelines, or costs before any time is spent on these elements. This will help prevent scope and billing issues.

Quoted Functionality

The following functionality is the list Whitelabel used to quote on the project. The final scope of the project may change and the overall cost of the project can be increased or decreased by adding or removing or modifying functionality. Essentially price grows more refined as the project scope tightens.

These 'stories' are to act as a basis for conversation between Whitelabel team members and CPC Healthcare. These communications will revolve around the detailed needs and acceptance tests.

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Cost Estimation and Functionality Stories

Phase I Stories and Estimate

CPC Healthcare Corporate Site			
Name	Story	Low Hour Estimate	High Hour Estimate
Iteration "0"	An opportunity for the team and client to meet and confirm scope details, prioritization and timing.	4	6
Information architecture	A document outlining information organization on pages, flow of job searches, text highlights, etc.	10	15
Template construction	Assembly of graphics into working page templates for content production	20	25
Content population	Population of templates with content and creation of plain, printable page for each page on the site.	30	35
What's new and Our Words administration	An administration tool, accessible via a single user ID and password that will allow easy administration of the what's new and Our Words section of the home page.	30	40
Change password	Allows admin user to change the password they use to access the admin tool	4	6
Flash Development	Create 3 different flash animations assuming the create component is provided. These are max of 15 seconds of animation. There are two roll-over animations plus one navigation bar done in flash	36	42
Product Delivery	Transition of the web site to the live environment and final testing before launch. This may include working with the hosting provider to make necessary adjustments to the environment or the application.	10	12
Subtotal		144	181
Project Management	Module and system testing	16	19
Testing	Module and system testing	13	16
	Total Estimated Hours	173	216
	Total Estimated Costs	\$ 19,030.00	\$ 23,760.00

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Additional Functionality:

Outbound Email Management for 'Keeping in Touch': Whitelabel and GotMarketing bring you Campaigner™, an affordable suite of self-serve, permission-based email tools. Campaigner offers the following features. HTML templates make creating professional email campaigns easy and fast. Superior technology enables personalization for improved response rates. Trackable links and real-time statistics help you measure your success.

Use Campaigner to:

- Start and manage permission-based contact lists
- Publish newsletters
- Run promotions
- Send announcements
- Distribute online catalogues

Whitelabel TALK functionality is available at the costing listed below.

Pay-As-You-Go Pricing Plan	
Number of Emails Sent	Rate per Email
12 or less	no charge
13-500	\$0.11
501-1000	\$0.07
1,001-5,000	\$0.05
5,001-25,000	\$0.035
25,001-100,000	\$0.0225
100,001-250,000	\$0.0175
250,001-500,000	\$0.015
Over 500,000	\$0.01

Flash Animations:

Hosting Management and Reporting: Detail information on the Fort Nocs Networks hosting and management solution is provided in the subsequent proposal. Reporting is included in the monthly cost of a hosted solution through Fort Nocs. A summary of that pricing is included here:

CPC Healthcare Hosting and Management	Set-up	Monthly
	\$220	\$135
-Includes shared server, OS, cabinet space, bandwidth, and reporting functionality		
Total Monthly Cost		\$135

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Timeframes

The next step in estimation is to assess customer-timing priority. If CPC Healthcare requires the site to be released to meet certain business-driven milestones, that will impact the number of developers assigned to the project. At this stage, Whitelabel would estimate that the total project would take **4 to 6 total weeks**. As customer priorities are better understood this estimated timeframe could become shorter or longer

Next Steps

1. **Functional Story Review:** In tandem with CPC Healthcare, Whitelabel will gather further requirements to develop a more detailed and refined functional story list.
2. **Re-costing:** Once the functional story list becomes more refined, the Whitelabel development team will re-cost any additions or omissions from the story list.
3. **Prioritization:** One of the most important steps is to work closely with CPC Healthcare to prioritize which functional stories are the most critical. This way, the most important elements of functionality are built within the first release.
4. **Release Scheduling:** Once the prioritization exercise has taken place, Whitelabel will work in tandem with CPC Healthcare to determine a release schedule that matches business requirements.

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Who is Whitelabel?

Whitelabel provides Internet development and IT services to organizations building robust and functional web applications. We provide "as-needed" solutions to the technological challenges of these companies. These companies use Whitelabel on a project-by-project basis.

Whitelabel was formed in May 2001 to address the challenges of outsourced development. Over the last few years, the Internet and the nature of Internet projects have changed significantly. Whitelabel observed that professional services firms have not evolved to meet these new challenges. Whitelabel's goal is to fill this gap by providing outsourced development services with discipline, experience and flexibility.

Whitelabel's development methodology is unique. The client plays an active role in the project, ensuring that technology and scheduling decisions are based on sound business objectives. Whitelabel understands that software projects are very fluid. Requirements change and priorities shift. Our development process is flexible enough to account for these changes. Whitelabel also understands that today's priorities do not necessarily reflect next year's priorities. Our software is built to be extensible – if there are new requirements that are necessary for future phases, you will not have to "reinvent the wheel" to implement them.

Application Development

Our application experience lies in client-server and Internet-based development. We do systems design and programming using a number of software applications. We primarily develop using the Microsoft platform, however, we also have a great deal of experience with UNIX, Oracle and Java. We have developed large-scale ecommerce, content management, CRM and email management systems

Internet Services

We have the full range of Internet and systems technology development experience. We have database programmers, application developers and interface specialists. We have experience in information architecture, usability, project management, animation, streaming video, audio engineering and interface development.

Internet Property Management—Fort Nocs Networks

The Whitelabel Internet property management (Fort Nocs Networks) service is designed to address specialized hosting needs. Our service is available, responsive, secure, maintainable and scalable. It gives you more control over client Web sites and allows you to deliver a higher level of service. We'll look after up time, configuration, security, licensing, e-mail, domain registration, database integration, fail-safes and ongoing maintenance. In addition, we are always there to consult on your future growth plans.

Skills and Experience

Whitelabel was formed in May 2001 to serve the interactive needs marketing organizations and their clients. Whitelabel currently consists of about 12 developers and project managers, each with between 6 and 12 years experience in their field.

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The team's skill sets lie primarily in the windows world; we have developed many IIS/ASP/COM/VB applications and Internet properties using these technologies. We also have developers with solid experience with Java, C++, Oracle, and Unix environments

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What does 'Whitelabel' Mean?

Whitelabel is focused on building the technology behind your brand. We provide deep technology experience that works with you to help realize your business objectives online. Whitelabel operates with the understanding that no one can understand your business as well as you do; we simply provide development experience and a development methodology that ensures you are able to satisfy your customer's expectations in an online environment.

Our strength is not marketing, brand development or creative design. We build high-quality software and manage systems that help you focus on building revenue and growing your business.

Why Whitelabel?

- **Experience:** The company may be new, but this team has worked together for the past several years. The majority of the Whitelabel technical team came from Cyberplex where they were instrumental in architecting, building and supporting some of the largest and most complex internet applications in Canada, such as Chaptersglobe.com, Bell Mobility, Handspring.com etc. Whitelabel maintains a core group of 12 'technology leaders' that have between 6 and 12 years experience in development. This core group manages the overall project and leads any contractor resources that are brought in for specific technical needs.
- **Focus:** Many application development companies focus on web graphic design and ebusiness consulting. Whitelabel knows no one understands your business as well as you do. As such, we offer the most experienced technology team that works closely with you to transfer your business requirements into a technology result.
- **Process:** Whitelabel's process allows us to develop high-quality software, on time and on budget within a much more flexible and adaptive environment. Our process is built on the fundamental understanding that during a project, requirements will change and the development process must be able to morph to those changes. By using elements of extreme programming (www.extremeprogramming.org), Whitelabel breaks up complex development projects into small, mutually exclusive units of functionality that are all driven from business and user requirements. Some of the main elements of Whitelabel's development process include:
 1. **Communication.** A Whitelabel development team thrives on shared understanding of the problem and the software, and the most efficient and effective method of achieving shared understanding is face-to-face communication. Anything that obstructs efficient communication needs to be removed.
 2. **Simplicity.** Simplicity is the art of maximizing the amount of work not done. Dee Hock, former CEO of Visa International, says "Simple, clear purpose and principles give rise to complex, intelligent behavior. Complex rules and regulations give rise to simple, stupid behavior".
 3. **Feedback.** Often project teams and their customers don't realize they're in trouble until a short time before delivery. Whitelabel development teams get frequent feedback - week to week by delivering working software, but also

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minute to minute through testing tools and any other mechanism they can implement.

- **Application Life-Cycle Management:** Whitelabel stands behind the applications we build. Once a development project is complete, we don't just wish you luck with the ongoing management of the application. Whitelabel offers a very robust managed service, branded Fort Nocs Networks that not only manages your deployment into a tier one hosting facility, we provide ongoing management and maintenance of your entire application.
- **Great Client Service is Great Project Management:** We know the best customer service is delivering to your expectations, on time and on budget. We are able to do that by employing a unique methodology managed by a very experienced team of technical project managers and developers.

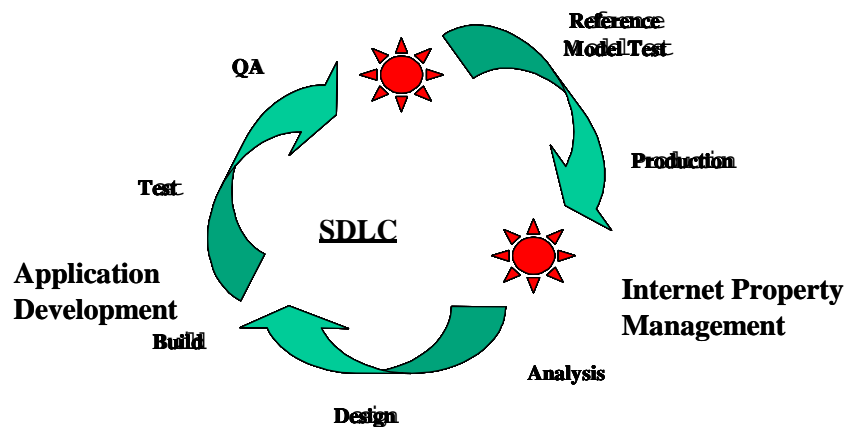
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WHITE LABEL Service Philosophy

- **Complete Software Life Cycle Management**

Ease the Software Delivery Life Cycle: Most application development organizations build netcentric applications employing some form of system development life cycle (SDLC). When the company developing the application is also responsible for deployment and management of the application, traditional operations methodologies still apply. Whitelabel helps you design, develop, deploy and provide the ongoing management of your application. Whitelabel allows you to focus on your business for the entire lifecycle of the software product.

Figure 1.0



Whitelabel Software Development Life Cycle

Traditional operations methodologies neglect to take these disconnects into account and as a result will fail to address specific needs of most client organizations. Using these traditional methodologies within a managed infrastructure leads to the following situations:

- Poor quality input into the Internet Property Management (IPM) environment causing service level compromises and a decline of hard earned customer confidence.
- Inadequate output to fuel the client SDLC resulting in inefficient automation of unrefined business processes.

Whitelabel attempts to address these disconnects as an organic part of an overall customer site development, deployment and management methodology. It is one of our fundamental beliefs that the more fluid you make the SDLC the shorter the cycles and the more reliable the finished product.

- **Your Uptime is our Portfolio**
Our product is the reliability of your ebusiness initiative. All of our energy is spent ensuring your Internet application and infrastructure is built for high availability, performance and scalability and is always up for your customers.
- **We focus on your technology strategy, you focus on your business strategy**

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Whitelabel's aim is to design and build the technology manifestation of your business strategy. Our core competency is the deep understanding of leading edge technologies to ensure your business strategy is adequately realized through technology. Our application development and Internet property management teams provide the full lifecycle management of your technology asset so that your precious resources can focus on building the strategic elements of your business.

- **Focus on Usability:** The user is kept front and foremost during the development of all our systems. Our systems are designed so that the user has the best possible experience when using them

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Bios of Key Project Personnel for Whitelabel

Jim Latimer – President & Managing Director

Jim Latimer, founder of Whitelabel, has been involved in computing technology and application development for over ten years.

The last five years, Jim was Director of Operations, General Manager, and then Director of Information Services for Cyberplex, one of Canada's leading Internet Professional Services firms.

As Director of Operations at Cyberplex, Jim was responsible for all aspects of production including leading Project Management, Development, Design, Quality Assurance, Site Architecture, Site Operation/Hosting, and Information Technology.

Jim brings a very well rounded skillset in operations, technology, and project management.

Tyler Campbell – Production Director

Tyler brings six years of Internet industry experience to Whitelabel, including the last 3 and a half years at Cyberplex. He began his career in online media, working as online editor of The Hamilton Spectator's two web properties. From there, he moved on to Torstar Electronic Publishing where he served for a year as a Senior Internet Producer.

In 1997, he joined Cyberplex on the development side of the house, working first as an Interface Developer and then, for a year and a half as a project manager, during which time he managed projects for Microsoft Canada, Labatt, Eaton's and The Loyalty Group. In 2000, Tyler moved to the sales and marketing side of the operation as Director of Market Development, where he lent his production expertise to the sales process, and helped develop new sales strategies.

Tyler has a B.A. (Hons) in English - Rhetoric and Professional Writing from the University of Waterloo.

Sean Hutchison – Director, Business Development and Fort Nocs Networks

Sean brings several years of Internet industry experience to Whitelabel. He began his career as Global Account Manager for Internet Commerce at Procter and Gamble Inc. Sean left P&G to join Cyberplex first in client services and then as one of the founding members of Cyberplex's Strategy division. It was there that he developed the Internet strategies for organizations like Sprint Canada, St. Joseph Printing, The Bulldog Group and Olympia and York. In early 2000 Sean joined The Brightspark Group in the venture capital division and lead investments in such companies as Borderfree.com, Infotriever and Think Dynamics.

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Most recently Sean was the Director of Business Development of Think Dynamics and was responsible for securing Think Dynamics first \$11 million in venture funding.

Sean also teaches Internet Marketing strategy at Wilfrid Laurier University.

Sean has a B.B.A. from Wilfrid Laurier University and Vaxjo University, Vaxjo, Sweden.

Lee Picano – Technical Lead

Lee has been developing either client-server or Internet applications for seven years. Lee has worked on various project including custom accounting and financial systems, insurance operations management systems, and asset tracking and inventory systems.

Lee brings extensive experience in Visual Basic, VB Script, MS SQL Server, MS Access, and other Microsoft technologies. Lee was recently tech lead for a number of internal Cyberplex projects including a web-based PO system and online survey application. Lee has also recently developed a management system for recruiters.

Aimee Hernandez – Site Operations Specialist and Developer

Aimee spent close to two years in the Cyberplex Site Operations group in a consulting and application developer role. In addition to her extensive experience with ongoing site management, support, and hosting, she brings 3 years of development and 6 years of business experience to the team.

While at Cyberplex, in addition to client work, Aimee built a web-based time and project tracking system. Aimee recently returned from a contract in Stamford where she built an online survey management system.

Nelson Pereira - Interface Development Manager

As the Interface Development Manager for the Toronto Production Center of Cyberplex, Nelson was accountable for the professionalism and quality of all interface development staff and their deliverables. While providing a technical direction Nelson also focused his efforts into future technologies to keep Interface Development within Cyberplex on the leading edge.

Nelson was also challenged with providing professional direction and strategic guidance to his Senior Interface Developers and Senior Interface Team Leads across the entire organization.

Information Architecture is the organization of information taking the user's needs into account. Throughout Nelson's career at Cyberplex he has been heavily involved in working with the client to help facilitate these decisions.

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Nuno Serrenho - Senior Developer, System and Database Administrator

Nuno brings over seven years of Internet industry experience to Whitelabel. He began his career as a freelance webmaster for a variety of Internet sites. In 1997, he joined Cyberplex as a web developer. During his time at Cyberplex, Nuno held a variety of roles, including Technical Lead, Senior Developer, System Administrator and Database Administrator. While at Cyberplex, he was an integral part of projects for clients such as Handspring, Chapters, Labatt, Eatons and Sprint Canada, among others.

After four years at Cyberplex, Nuno joined Webfront as a Senior Developer where he developed a proof of concept .NET solution, a first in Canada, for Microsoft and the Government of Ontario which showed several advanced features

Mike Erlindson - Information Design and Interface Development

Mike's focus is content. Mike has over 10 years experience working in IT and Internet development and has been working for Whitelabel since spring of 2001. He worked in information design and interface development at Cyberplex for three years. While at Cyberplex, he worked on projects for MSN.ca, Chapters.ca, Bell Mobility, AT&T, ING Direct, Eatons and Sprint Canada. Prior to Cyberplex he was the senior Internet producer for the Toronto Star Online. He teaches information design and client management in technology part-time at Centennial College. In addition to information design and development, he is an experienced copywriter. Mike holds an MA in Journalism from UWO and a BA in Political Studies from the University of Guelph.

Mike is experienced working with CSS, ASP, DHTML, JavaScript, XHTML and VBScript

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Whitelabel References

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Signatures

This agreement has been executed by each of the parties on the date below the signature of its duly authorized representative. By signing this agreement, the two parties agree to abide by the terms outlined herein. This agreement shall be governed by and constructed in accordance with the laws of Ontario.

Whitelabel	CPC Healthcare
<i>Name</i>	<i>Name</i>
<i>Signature</i>	<i>Signature</i>
<i>Title</i>	<i>Title</i>
<i>Date:</i>	<i>Date:</i>

Life of Agreement

The life of the agreement will be the duration of the project

Warranty and Support

Whitelabel will warrantee and support all code for the functionality we deliver for the period of 90 days.

It is our desire to have a fully functional site live to the world as well as have the end client and their users experience a great application. We will endeavor to assist with any issues whenever they may appear.

Invoicing and Payment Terms

Whitelabel will invoice upon acceptance of each iteration, for the time invested in developing each deliverable. This will be every 2 weeks. We will submit a final invoice upon final acceptance of the release, which will include Project Management and Testing/QA time as well as any additional time agreed to by CPC Healthcare.

Payment terms are 30 days from invoice delivery date.