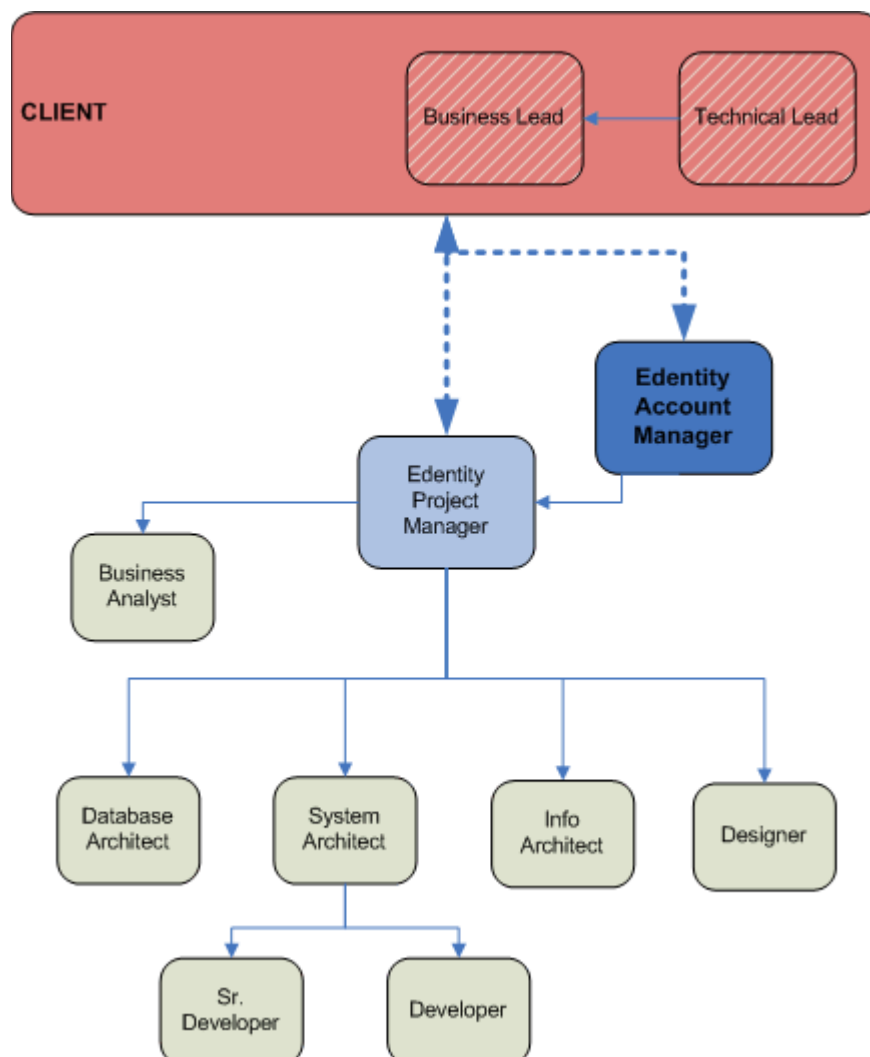


## Appendix A - Engagement Management: roles and responsibilities

As commonly found in the services industry the management of responsibilities of the overall account management and the tactical delivery of the specific project will be split between an account Manager and a project Manager

**Account Manager:** The account manager is responsible for setting appropriate strategic objectives for the project and ensuring that any activity and every deliverable is properly aligned to achieve the agreed upon business objectives. The account manager carefully inspects every deliverable prior to its release to the client. She/he negotiates the overall contract and is accountable for client satisfaction.

**Project Manager:** The project manager is responsible for the day to day operations surrounding the project. He/she is responsible for building a project plan and building consensus throughout all the constituents of the project: client, team, and company management. He/she manages the timeline and the budget of the project and carefully evaluates risks associated with it. She/he appropriately flags out-of-scope requests and appropriately communicates them to the client in partnership with the account manager.



## **Appendix B – Company & Team Credentials**

### **About Edentity**

Whether you are looking for a Web services solution, Web site services, database implementation or reporting solution, Edentity places the emphasis squarely on your business processes. The end result is to make your business functions faster, smarter and easier to use.

Edentity combines a refined methodology from requirements gathering to quality assurance testing with the highly flexible, fast Web services platform in .NET to generate exceptional results quickly and affordably.

Edentity software is sophisticated enough to save you time and money, yet pleasing to the eye and friendly for the user. Edentity builds interfaces that explain themselves and remove the frustrating repetition that plagues most business software.

Edentity developers have a strong intellectual foundation solidified by the best engineering schools in the country and strive for efficiency in everything they do. Edentity will work with the systems that are working well and cost-effectively upgrade the systems that aren't. Those savings are passed on to our customers.

At Edentity, business is just as much about adhering to a strong code of ethics as it is for pursuing growth and success. We care about your business and you will feel it in every step of the process.

### **Core Competencies**

We focus entirely on building top quality Web sites, Web applications and Web service solutions with .NET. We have been working with C#, VB.NET, ADO.NET and the complete suite of .NET tools since they were released in 2002.

Some of our best work has been done onsite with large companies and government. We have a history of building solutions on the Microsoft platform and are excited at the prospect of bringing companies up-to-date with .NET technologies and Web services.

Our focus over the past months has been centered on our Web site content solution WebConnect. This product is a content management tool for corporate, retail and catalogue based Web sites. We configure the solution as well as build the front-end Web sites along with a content and design partner.

Edentity consultants are "all encompassing" developers and architects who are keen business analysts as well as seasoned programmers. We realize that communication is essential to the success of a project so we are responsive to direction and quick to bring up concerns. We work well alone or in teams and have had many successes working alongside other resources at the client site.

## **Management – Eidentity**

### **Michael Assad - Co-founder, Director of Professional Services**

Michael Assad graduated from the University of Toronto with a Computer Engineering degree. His entrepreneurial endeavors include building a Web site for Nortel, and implementing a CRM solution for Research in Motion (RIM). Michael worked very briefly as a consultant for MobileQ Inc. (now Extended Systems) before leaving during the dot com bust. After a couple of months of job searching, he stumbled upon the idea of building personal websites after receiving much positive feedback from his own that he had been using in his search. He decided to build a business around creating personal websites for job seekers and professionals and thus Eidentity began. After partnering with Jon, the company took on a number of different directions before settling on a focus on web-based software with .NET.

### **Jonathan Voigt - Co-founder, Director of Product Development**

Jonathan Voigt graduated from Systems and Computing Engineering from the University of Guelph. Jon started his career at United Systems Solutions, an innovative technology consultancy based in Toronto. In his time there, Jon took a lead role on the architecture of a unique document and image management system called WebArchive. In 2001, United was acquired by Cognicase/CGI and Jon saw an opportunity to move on. He settled into a select team of developers and business consultants to bring the award-winning Maximiser Enterprise for Notes CRM to market. Having completed another challenge, Jon decided his fate lie on his entrepreneurial side. In 2002, Jon ventured off with Michael to start Eidentity, bringing valuable software architecture and management experience to the table.

### **Joel Varty - Director of Research & Development**

Joel Varty has extensive experience with Web application technologies and architectures, both from a product and a consulting perspective. Previous to joining Eidentity, Joel worked for Point Alliance, a consulting services company specializing in custom Web development and enterprise integration projects at companies such as Cadillac Fairview and Canadian Life and Health Insurance Association. He specialized at incorporating disparate technologies to solve complex business problems, bringing enterprise and legacy data together in custom Web interfaces. Before that, he spent 4 years as a lead architect and senior developer on the Web client of a leading CRM product, Maximizer Enterprise for Notes, with United System Solutions (now Interchange Solutions). Joel Varty graduated from the University of Guelph with a degree in English and Computer Engineering; he is also a Microsoft Certified Solution Developer for the .Net Platform.

## Appendix C – Project Management Methodology

At EDENTITY we view a project as a planned undertaking having clearly defined and agreed upon goals and objectives. These objectives provide a baseline against which all aspects of the project can be measured on a regular basis. Objectives must be specific enough to be able to pinpoint when they have been achieved and exactly how much effort will be required to achieve them. Accomplishing these objectives within a specified budget and timeframe is the goal of the project team and the responsibility of the project manager. Project Managers are charged with managing the difference between *Possibility* and *Probability*. Project managers use the latest web technology to effectively communicate with teams and clients. Each client is allocated a Portal (Microsoft Sharepoint Portal) where all relevant communication, documents, tasks and milestones are centralized for easy access.

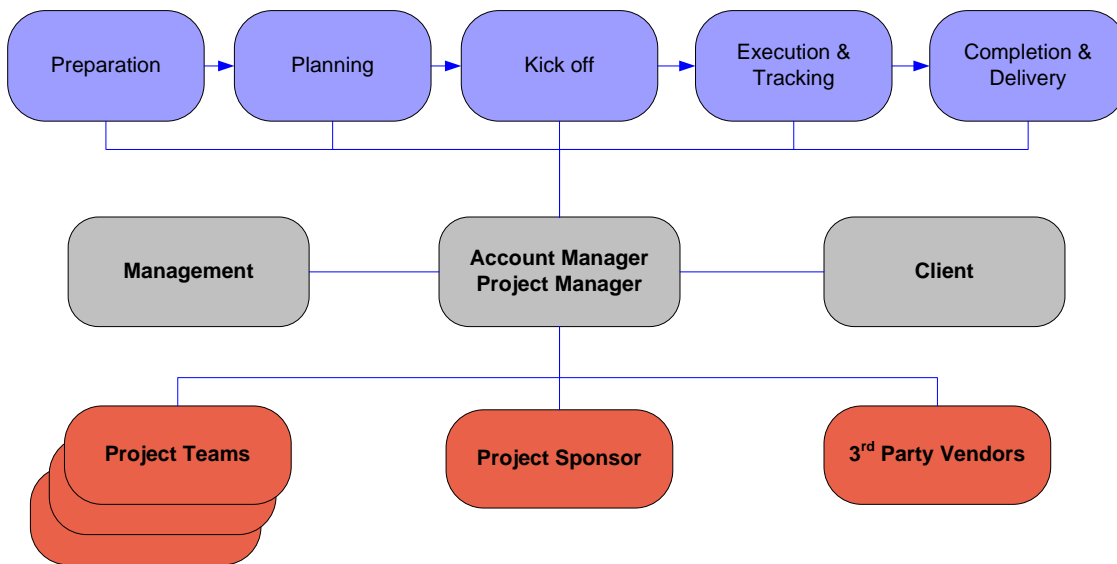
### Framework

The framework represents the fundamental disciplines of Project Management and includes the crucial stages of managing a project. All projects, regardless of their size and nature, adhere to this framework. The framework used by all EDENTITY Project Managers represents the stages necessary to consistently deliver successful projects on time and on budget.

The framework incorporates project management best practice and defines five distinct phases in the project life cycle:

1. Preparation
2. Planning
3. Project Kick-Off
4. Execution & Tracking
5. Completion & Delivery

The following diagram is an illustrative representation of the five stages of our project management methodology framework, with an emphasis on communication management. The Project Manager and Account Manager are the key communication links between the various members of the group.



EDENTITY assigns two key managers to projects: A Project Manager and Account Manager. Our methodology diagram shows the importance of relationship management with contributing third party vendors or project stakeholders. EDENTITY has experience in managing projects as a prime contractor or sub-contract to other vendors. A communication strategy is established at the beginning of the project. Expectations, assumptions and responsibilities are outlined in the Project Charter and agreed on by each party on the project.

## **Preparation**

In this phase we gather all relevant background information that helps us understand and define objectives and scope of the undertaking. A high-level timeline and budget for Pre-production and Planning phases are also determined, and assets needed from outside sources are also outlined.

## **Planning**

It is during planning that project managers are most intensely involved with any given project. Project managers investigate the four basic parameters that define a project: scope, time, budget and assumptions.

The 'what, how, who and when' are detailed in a Project Plan, defining the start and end dates of the project milestones and deliverables. Plans are consolidated for system integration projects to ensure all activities and milestones coincide within the contracted timeframe. Project managers will work very closely with the resource manager to build a team that best suits the needs of the project. At this time, project managers will also prepare to transfer relevant knowledge to team members effectively and efficiently. If a detailed budget for the entire project has not yet been given to the client, it would be finalized and delivered at the end of the Planning phase.

## **Project Kick-Off**

Kick-off meetings will involve most of the project team. It is a forum for project managers to transfer project information to team members and answer any questions for the team. Proper preparation by project managers allows these meetings to run efficiently, foster teamwork and create excitement.

## **Execution & Tracking**

This is the "action" phase. Progress is monitored and reported to appropriate stakeholders. Risk management, issues management, project audit and change control are an integral part of this phase. Constant communication is the key to success during this busy development stage. Project managers consistently update and monitor all living documents such as the Project Plan and closely track issues, budget and changes. Keeping the project's scope, budget, timeline and resources in balance is the project managers' ultimate responsibility during this stage.

## **Completion & Delivery**

In this phase all the 'loose ends' are tied up and an official project completion approval form is filled out and signed to signal the completion of the project. Project end reviews and lessons learned analysis is carried out to enhance our internal knowledge sharing. All team members are expected to submit positive or negative feedback about the project.

### **Project Integration Management**

At EDENTITY we focus on integration within the internal delivery process of the solution as well as managing the integration of other service partners at the project level. We have considerable experience working with integration partners such as PR agencies, advertising agencies, localization companies and the like. Our internal focus on integration is achieved through the use of various tools and deliverables.

## **Appendix D – Delivery Methodology & Process**

The following chapter describes our full delivery and methodology process, depending on the scope of the project, the deliverable mix and its depth could vary.

### **Strategic Planning Phase**

The Strategic Planning process is a series of focused discussions and brainstorming sessions. The overall goal of these sessions is to devise customer-centric Web strategies for our clients to maximize their assets and create a competitive advantage. Depending on the scope of the project, topics addressed during the Planning process may include:

- Business Model Development
- Business Process Reengineering
- Online Brand Development
- Interactive Marketing Strategy
- Community Building Strategy
- Customer Relationship Management Strategy
- Usability Assessment
- Technology and Integration
- Content Management

### **Business Requirements Document**

The outcome of the Strategic Planning process is the Business Requirements Document (BRD). The BRD reviews the conclusions drawn from each module of the Strategic Planning process and aggregates these conclusions into a vision for the solution. The BRD includes a high-level feature set derived from the Planning sessions, including a high-level understanding of the solution's architecture. The BRD serves as a checkpoint document to confirm the scope of the project as well as our understanding of our client's business objectives.

### **Project Charter**

The primary purpose of the Project Charter is to gain agreement between management and sponsors about the overall direction and scope of the project before a detailed project plan is developed. The Project Charter establishes a baseline to keep the project on track.

In order to achieve the primary objective the Project Charter includes: Project Goals and Objectives, Project Scope, Deliverable Major Milestones, Risk Assessment, Risk Management and Strategy, Quality Assurance, Scope Management, Change Control and Budget. The Charter may contain additional content areas or have some areas omitted, depending on the nature of the project.

All issues, changes, progress can be measured against the baseline of the Project Charter throughout the duration of the project.

### **Pre-Production Phase**

The pre-production phase marks the beginning of solution development running on two parallel tracks. A series of five documents informed by the BRD will be produced in order to distill and clarify the specific information required by the production team. These documents will outline the required functionality, information architecture and user experience, and software/hardware recommendations of the solution. Style guides are developed and mock-ups are designed near the end of the pre-production phase.

### **Front-End**

The user experience team designs and builds all templates for the solution. They are responsible for creating all graphic elements, all HTML and JavaScript coding and any other interface components such as Flash or other forms of streaming media.

### **Back-End**

The development team is responsible for all business logic component development and system integration including third party tool integration, as well as site administration tools, database development and data migration, and user registration customer profiling. They are also responsible for all HTML and interface integration.

### **Interaction Design Document**

By laying the foundation for the site architecture and user interface, the Interaction Design Document (IDD) is created to illustrate and test the user experience. It also balances the integration of required business objectives into the site architecture with the site's overall usability and functionality. The IDD is basically a roadmap of the online solution. It ensures that the site will be user-friendly and prioritizes the design elements that impact usability and information architecture.

Building on the information gathered from the Business Requirements Document, the architecture team conducts independent research and collective brainstorming meetings to produce a paper version of the site. Other important site architecture elements that the IDD covers include: strategy for the site that works in tandem with the business objectives, grouping of content, access to content, layout of content, navigation items, navigation layout, applications layout, grouping of applications, flexibility of functional architecture to allow for growth.

### **Visual Design Briefing**

The Visual Design Briefing is the culmination of the design exploration process. It communicates the proposed visual language of the site and provides inspiration to designers, giving them an opportunity to explore visual design solutions. The Creative Director summarizes information from the Business Requirements Document including brand identity, products and services, target audience, unique value proposition, and business objectives. The Creative Director *motivates* and *stimulates* by combining information from the Business Requirements Document and Interaction Design Document with ideas about possible design directions and narratives about user experience that ground the brief in reality. The Creative Director communicates the visual language, including colour, type, motion, use of space, and other visual design factors.

The Visual Design Briefing links the corporate and brand identity with the attitude, tone, voice, look and feel of the site, and relates this to the user experience. The Creative Director summarizes the interaction between the client and User Experience Team to bring the designers into the discussion. The Visual Design Briefing may include visual elements, a written description, or a combination of formats. The Visual Design Briefing gives the designers the background for the design rationale, which they will provide when presenting the mock-ups to the client.



## **Design**

It is EDENTITY's practice to deliver no more than 3 sets of front-end mock-ups for site 'look and feel'. Both sets are comprised of a main page and a significant subset page.

Change and modification requests for mock-ups are part of the normal process of site development. However, to ensure that site development is kept within the allocated budget and timeline, we keep open channels of communication to manage the changes appropriately.

## **Functional Requirements Document**

For successful web application development, the technical team requires a clear understanding of what needs to be developed. The Functional Requirements Document (FRD) provides the detailed technical specifications and data flow diagrams that the back-end team needs to develop the site's features and functionality.

While preparing the FRD, the Systems Analyst assumes the role of a direct liaison with the client. From field lengths to proper enforcement of business rules, all of the information that the technical developers need is encapsulated in the FRD. It has low-level detail that enables tasks to be passed on to any developer without having to fully brief them on the entire project. The FRD increases the technical team's efficiency by eliminating the ambiguity and miscommunication that cause costly errors in site production.

## **Technical Architecture Document**

The Technical Architecture Document (TAD) follows a software engineering approach in communicating the site architecture decisions to developers and providing an overview of the complete site architecture design. The TAD covers a wide range of technical issues including the tools and technologies involved in the development of the site, and the guidelines for implementation. It outlines the major objectives of the site, decides how software is distributed across a network, describes important ad hoc algorithms used in the software, identifies major risks, and shows how security requirements are met. The TAD empowers developers with the information they need to ensure good architecture design.

## **Quality Assurance Test Plan**

During the beginning of the production phase, a Quality Assurance engineer will produce a Test Plan. The Test Plan identifies test cases, test scripts, and allocation of resources for the project based on the individual requirements of the IDD and the FRD. At the same time, our QA department provides active feedback on possible difficulties (if any) the design poses to the testing process. In addition, QA may run any or all of the following testing procedures: smoke tests, unit tests, system tests, and integration tests.

## **Production Phase**

Production is guided by the Strategic Planning and Pre-Production deliverables, which are approved by the client. Throughout the project, the Account Manager and Project Manager will be the points of contact to ensure clear and effective multi-level communication – between all teams and team members, and between EDENTITY and their client representatives.

During the production phase, development continues on two parallel tracks and is then followed by a period of integration and testing. Elements of the Production process are started as the related tracks in Pre-

Production are completed allowing parts of Pre-Production and Production to run concurrently. Using the templates created by the Lead Designer, the design team creates the front-end of the solution. The designers use the Interaction Design Document to provide a page-by-page guide for the site. On the back-end, the development team uses the Functional Requirements Document and Technical Architecture Document to guide the development of components.

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## **Appendix E – References**

### **ABS**

Edentity worked directly with our team to build a number of custom solutions for clients in the government vertical. The project was delivered on time and on budget, exceeding our expectations in functionality, quality and attention to detail.

The project took full advantage of the .NET platform and as well as Web Services and complex .NET controls.

Edentity was able to work within the complex guidelines and requirements created and provided useful insight to streamline the development process and tune the functionality to take full advantage of the .NET framework.

They were able to deliver a system that not only adheres to the requirements specified but in some cases surpassed them.

In spite of the demanding project timeline Edentity delivered the application to our satisfaction. I have no hesitation in strongly recommending Edentity for any type of custom web development effort.

Hannan Chervinsky  
President  
ABS System Consultants

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### **McCain**

I would be most pleased to provide reference to any potential customer of Edentity - on all main bases: technical, creative and account management.

Those are the basis of any project.

It is always both a pleasure and reassurance to deal with you Luca (Gorlero). The trust factor is most critical from my point of view. Not only have you excelled in technical expertise, but the guidance and support that you have provided to Business has made project implementation a pure pleasure!

Kudos my friend for all the attention, skill and effort! I look forward to our next endeavor together:)

*Comments from Melanie Lebrun, Director Business Analysis, McCain IT*

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Email: [mlebrun@mccain.ca](mailto:mlebrun@mccain.ca)

### **Agile Technologies**

Edentity worked directly with our team to build a custom document management solution for a client insurance company. The project was delivered on time and on budget, with all of the required functionality.

Working on a .NET platform using their new “Mega Blocks” web development framework (multi-tiered, Microsoft IIS on Windows 2003, Microsoft SQL Server 2000). The project is currently being integrated into our clients’ environment for their system administrators to take over.

Eentity was able to work within the complex database guidelines that were set out by our database-savvy customer. They were able to deliver a system that not only accommodated their requirements but in some cases surpassed them.

With a fairly aggressive timeline, Eentity delivered the application to our and our client's satisfaction. I have no hesitation whatsoever in strongly recommending Eentity for this type of development effort.

*Comments from John Johansen, Partner, Agile Technologies LLC*

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