1. About Pradvis:

Pradvis is an advisory Startup for small businesses (100%). Please refer to the link above for the Low fidelity MVP page to learn more.

2. Guide to this RFP:

Our expectation is that this document will convey our vision for the website. It includes a background section about our organization, suggests an outline for organizing the content of the new site, and desired technologies. In providing these details, our intent is not to convey that we have all the answers in creating the best possible site. The ideal and preferred vendor will bring its own ideas and vision based on industry expertise, technical capability, and client relations, guiding us to incorporate our goals into that vision.

3. Professional service Overview:

Our organization -- Pradvis—is a new Startup in advisory services for small businesses. We are looking for a seasoned web developer to build the website that is going to support our business model. Since the website is the core of our business, we strongly discourage inexperienced web developers from applying.

Applicants with strong web-design skills are highly encouraged to apply.

4. Professional service Goals:

The goal of the Professional service is to build an advisory platform for small businesses. Basically, a one-stop shop. The Professional service is about creating a marketplace where any small business owner can choose from a large database of independent consultants for a professional service. The idea is to allow small businesses to receive high quality professional

services at reduced cost on one hand and to help consultants secure an additional income source on the other hand. The website must be able to meet some important features. Please refer below to see list of key features. We are very open to suggestions as well. **Proposed Sitemap:**

While we remain open to and expect from the web developer suggestions on the site sections and navigation schema, here are some of the sections we would like to have:

- ***About***: Who we are as a company, mission, and vision, etc.

- ***Resources***: Basically, a place where the consultant will be able to access to resources that can help him/her provide any professional service. For example, links to main benchmarking sites will be provided here. This section should be available to consultants only.

- ***Services***: Basically, the types of services we offer to small business owners and consultants:

• ***Professional Background[1]check for consultants***

• ***A marketplace for business owners to connect with independent professionals • Intermediation for higher budget (Will be added later on)***

- **Two buttons right in the middle of the home page**: One named after ''Consultants: Provide consulting services''; and one named after '' Business owners: Request consulting services''.

- **A community page (Thread)** where small business owners can make posts among themselves. Accessible only to small business owners and Pradvis Team. This community should only be accessible when logged in**.**

- **A community page for consultants,** accessible only to consultants and Pradvis team. This community should only be accessible when logged in.

[1] Professional Background check is an important differentiator with the competition: The consultant/freelancer should provide the name, nature of the relationship, phone, and email of two references. Next, an automatic email will be sent to these two references to complete online an assessment of the consultant's experience. Now, depending on their assessment (Pass/Fail), the consultant's profile should be automatically updated to ''Professional background verified''. Etc.

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- In the footer, in addition to links to social networks (Linkedin, facebook, intagram, etc.), there should be links to privacy and terms.c Etc**.**

5. Scope of Work:

The following points will be discussed with you once selected:

• Professional service management: Who will be our point of contact? • Content strategy (We will provide the initial content simply as a starting point for you) • Copywriting

• Illustration

• Information design

• Visual design

• Search engine optimization

• Front-end coding (HTML/CSS, animations)

• Back-end coding

• Testing (A/B Testing, back end and front-end testing, etc.) & quality assurance • Ongoing Support / Retainer

• Timeline for Completion: April 15th 2022

6. Aspect to consider:

• SEO Keyword Analysis – Being found on Google, Linkedin and facebook is important. • security – SSL, etc.

• website maintenance & hosting

7. Professional service Timeline:
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2.5 months. April 10th 2022, is the launch date.

8. Criteria for Selection:

The right web developer would be chosen based on the followings criteria: - Experience

- Ability to respect the delivery schedule

- Quality of the professional service

- The pricing, Responsiveness, Etc.

10. Team Roles and collaboration:

Driss will be the Professional service manager at Pradvis. Zoom meeting and emails will be our preferred method of communication and workflow.

11. Submission instructions:

Please provide the following information in your response:

• Name, address, email, phone, website

• Team size, bios, years of experience for each, their role, awards/ certifications • Any additional resources required for support (Please no contractors or sub contractors)

• # of hours and general timeline from start to completion (approx.) • Itemized breakdown of deliverables with costs

12. Specific Requests:

- Code source to be available on request

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13. Expected deliverables (Open to suggestions…)

• Strategy
✓ Kickoff Meeting
✓ Website Strategy
✓ Informational Architecture

✓ Wireframe
✓ SEO Keyword Analysis
✓ SEO Copywriting
• Design
✓ 1-1 Homepage Concepts
✓ 2-3 Page Designs (Open to suggestions… .)
• Development
✓ Theme Development or template (WordPress… ..) ✓ Quality Control Testing + A/B Test + Beta test ✓ Cross browser
✓ Cross device
✓ Launch

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<u>Key features checklist:</u>

Consultants / Business Owners	**Feature Name**	**Feature description**	**Appendix**
General	Main Buttons	Right in the middle of the home page, there should be two visible buttons: 1) ''**Consultants**: Provide Professional Services'' 2) ''**Business Owners**: Request Professional services'' Open to suggestion: For example, these two buttons can also be accessible in various parts of the website to make the website user friendly.	

Consultants	Registration & Profile creation	When the consultant clicks on the above button (1) as a first-time consultant, he would need to register by filling the following information: 1) Email 2) Password 3) First and last name 4) Were you referenced by an existing user of Pradvis?: Yes/No. If the answer is yes, there should be a box to enter that user# (See more below on user#. Point#12). A consultant who references one consultant would get a 50% discount on his/her next service fees. Not entering that number should Not prevent the user from completing his profile creation. 5) Area of professional service in which he would like to provide professional services (i.e., Accounting, Tax, etc.) 6) Bank account for deposit: This can be provided later if the consultant wishes (For example, a pop-up message can appear, stating that he can provide this info later, and that this bank account serves to receive payment of consulting fees after providing the consulting services to a business owner. However, if they don't provide their bank account number for deposit, they may not receive their professional service fees payment. Other transactions options should also be available for them as well. 7) There should also be a space for the use of the credit card info, for let say, when the consultant would like to pay for professional background check request (See below) 8) Profile description with the following design and fields to fill. This profile's design is important to us, as it distinguishes Pradvis from other platforms: See Appendix I. Once the profile creation is completed, it should look like Appendix I. Open to suggestions.. 9) Perform a request for a professional background check: If the consultant chooses to request a profile verification, then, there should be a short form to fill. Information to provide in this form include: - The length of employment, name of 2 references and their email addresses	Appendix I

		- Next, an automatic email with a link will be sent to these two references: They will fill the questionnaires and then submit the form. Upon receipt of this form, the profile status of the candidate would automatically change to ''Professional background verified. - Designation/Certification # and issuing organization, and date of issuance. For example, CPA (CPA#: 145008; Issued by CPA Ontario; on January 25th, 2011, etc.). These infos are provided by the consultant, but they would be verified later on. - Criminal and credit check background are not performed. Only professional experiences and designation/certification are verified. - The consultant can choose to make this request later after registration. A pop-up message should be displayed, stating that people with verified background have better chances at getting the credibility of business owners. 10) A box should appear where the consultant can indicate the payment terms of the professional service fees by the Business Owner. i.e., 15 days, 20 days, 10 days after the delivery date. 11) The consultant should be allowed to choose the means through which she would like to receive his consulting fees: Bank Account, Paypal, etc. 12) As soon as a consultant creates a profile, au autogenerated number should be directly attributed to him/her. This number is permanent and will not change overtime. 13) The consultant should be able to upload his professional picture 14) At the end of the profile creation, there should be a confidentiality agreement to be signed (Check marked) by the consultant, acknowledging that he would take care of the business owner's data. See Appendix II 15) Once the consultant hits ''submit'' to complete his profile creation, he should receive a message containing a summary of the services. See Appendix III 16) A consultant whose profile is not verified, should see a button in his profile '' Request a Professional Background check. 17) Another button should appear where a consultant can advertise his/her profile so that his profile appears at the top of the search if he she chooses to.	Appendix II Appendix III
Consultants	Profile	- Within a consultant's profile, there should be a button available for a consultant to reference other potential consultants by simply typing their emails. - Allow consultants to create their profile using Linkedin if it makes it easy for them in the profile creation process	
Consultants	Profile access	I should be able to verified the ID of applicants if need be	
Business Owner	Registration	Once the business owner clicks on the above button ''**Business Owners**: Request Professional service'', he/she should be filling out the following fields: 1) Email address & PW 2) Business name 3) Business address 4) The name of the person performing this registration	Appendix IV

		5) Are you a main decision maker in this organization? Yes/No 6) If the answer to the previous question is No, then create two additional fields to provide both the name and the email address of a main decision maker. 7) Choose from a dropdown menu, the area of professional service in which he/she would like to receive a professional service: Tax planning; financial statements preparation; process improvement; data analytics; accounting services; …. Other. A complete list will be provided later. If the business owner chooses ''Other'' in the dropdown menu, there should be a field where she/he can provide the name of the type of professional service she/he is looking for. 8) Once a profile is created after the Business Owner hist ''submit'', there should a welcome message sent to his/her inbox, with a button: ''Find a professional''. This button should lead her/him directly to professional service request form to fill and launch the bidding or submit a request for assistance. 9) An autogenerated number should be created for the Business Owner. This number is a permanent number to identify this Business Owner. 10) A completed profile of a business owner should look like the Appendix IV	

Business Owner	Find a professional	First thing to appear for the small business owner when looking for a consultant should be: **Step#1**: A button " Find a consultant". If they already have an account with Pradvis, then, they should be able to access this by sampling clicking on the button right in the middle of the home page. **Step#2**: Budget field: XXXXXX, then clicks on next **Step#3**: Fill the other biding **form** criteria to find the right consultant (i.e., Description of the professional service request, years of experience of the consultant; location; payment terms; Number of admissible applicants, opening date and closing date, etc.). See Appendix V **Step#4**: Once all the criteria of the biding are filled, the business owner can now click on ''Launch the bidding process'': - This request would appear on the bidding feed to which consultants have access to. See Appendix VI - Consultants can open any request in the bidding feed, consult it, and then if interested apply to it. There should be a button below the request detail ''Apply to the bidding''. - The consultant would then fill some infos before applying to the request: Budget, length of delivery, years of experience, and other infos. Appendix VII **Step#5**: Once the biding period is closed, the business owner can access his Dashboard to select a given request and see all the bidders' offers, and select a specific bidder: - The Business owner can close the bidding anytime before the deadline to apply if he/she found a qualified candidate among the first bidders	Appendix V; Appendix VI; Appendix VII; Appendix X & X(F);

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		- Once the Business owner select a specific bidder by clicking on the button ''Grant the Professional service to consultant Appendix X(F)''. - Important: As soon as the Business owner clicks on that button to grant the bidding winner, his/her credit card is debited for the bidding amount and held by Pradvis depending on milestones. A message is also sent to the business owner regarding the next steps. - Once the business owner clicks on that button, all the other applicants are notified by emails that another consultant has been chosen as the winner of the bid and the price. - A confirmation message is also sent to the winner stating that he won the bidding and details regarding the next steps. - The Business owner card is debited for the total amount of the project (Including taxes) **Step#6**: The consultant would log in and access his/her Dashboard. Then he/she can start exchanging with the business owner (Docs requests, etc.) **Step#7**: The Business owner would not be able to cancel the Professional service if the deadline to deliver the Professional service is not passed. Once the consultant has completed the Professional service and uploaded the final report on the platform, the business owner can click on '' Professional service completed''. This action triggers the direct payment of the consultant. Usually, two business days or more depending on the payment terms. See Dashboard of the Professional service…… Appendix XI **Step#8**: A message is then sent to both the consultant and the business owner to thank them for doing business on the platform. **Note#1**: The consultant is given a certain time frame to complete the work. For example, 8 days. If he doesn't respect that deadline and the business owner doesn't want to postpone, then the business owner can cancel the professional service request after the expiration of the deadline. In that case, no amount is received by the consultant. The Business owner should not be able to cancel once the delivery has been made on time. To provide more info in the FAQ tab. **Note#2**: To create a button option where the consultant can make a request to extend the deadline for some days. Then, the business owner has the choice to accept or refuse. An absence of answer by the business owner is considered ''No''. Thus, the current deadline prevails. **Note#3**: There should a space for the BUSINESS OWNER and the consultant to make comment on each other profile regarding their respective experience. **Note#4**: Once the transaction is completed (Occurs when the business owner hits '' Professional service completed'' in the progression bar at the top of the workspace), an automatic invoice is generated and sent by email to both the consultant and the business owner. Theses invoices should also be available to them in their workspaces Please see Appendix V; Appendix VI; Appendix VII; Appendix VIII & IX; Appendix XVI & XVII & XVIII	

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Pradvis admin	Chat box	There should be a chat box where any users can message me directly. I should be able to log in and answer to messages	
Both	Workspace	For each professional service request by the business owner, there should be a workspace where: - The consultant can make a request of all the documents to the business owners. And each time a request is made here, the business owner should receive a message in his inbox, and /or his phone, stating that a request for documents has been made by the consultant. The message should specify that the business owner needs to connect on the website and upload the required documents. - Short description of the professional service requested by the business owner, the budget, and the request number - At the top of this workspace, the consultant should be able to access the resources as mentioned in point#5 above: sitemap. - Both the consultant and the business owner should be able to upload and download files on this workspace. The workspace should only be accessible to both the business owner, the consultant, and Pradvis's admin/founder. - Each time the business owner uploads a file on this workspace, a notification message should be automatically sent to the consultant. Vice versa. - At the top of the workspace, a **visible progress bar** should be displayed with at least the following steps: • '' I accept'' button for the consultant • Number of days remaining before the file is completed • ''Completed'' button accessible only to the business owner, who would click on that button. when the business owner clicks on that button, it should automatically trigger the payment of the consultant depending on the payment terms. • We will be open to other suggestions regarding this workspace for each professional service request.	Appendix IX
Pradvis admin	Data	I should be able to extract the data (details of the professional services on the platform) from time to time	
Pradvis admin	Data	I should be able to access to all the transactions details in the event a Business Owner or a consultant call me regarding a given transaction. For example, by simply entering the consultant#, Request#, Business owner# or directly through Pradvis Dashboard in **Appendix XII**	

Both	Dashboard	For both the consultant and the business owner, there should a small dashboard displaying: - For the consultant: Total amount earned on the platform for a given year; number of professional services performed; the total average professional service fees per professional service, etc. - For the Business owner: The number of professional services requested for a given year; the total amount saved compared to the traditional market, etc.	Appendix X & VIII

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Referral	Business owner	- Each time a business owner makes a referral of another business owner, he is given a $50, credited on his account. This amount can be used to make payment of his next professional service request. - There should be a button within a business owner account whether he/she would be able to click on to refer other businesses by entering for example the email addresses of the contact person of that business owner.	
General	FAQ	There should be a FAQ tab. I will provide its content later.	
General	Reminder/ Invoice payment	Depending on the payment terms as set by the consultant, there should be an automatic reminder sent to the business owner when the payment date approaches. The goal is to remind the business owner that he must perform the payment on the platform.	
General	Complaint	There should a button accessible to both the consultants and the business owners to file a complaint. Each filed complaint should appear in the complaint queue to which I should have access to and address them. The complaint blank boxes should include: - The professional service request number subjects of the complaint - The consultant#/Business owner# subject of the complaint - A short description of the complaint	
Consultants	Community page (Thread)	There should a community page (thread) accessible only to consultants, where they can make posts and reach to each other's comments.	
Business Owner	Community page (Thread)	There should a community page (thread) accessible only to the business owners, where they can make posts and reach to each other's comments.	
Consultants	Temporary deactivation of the account	The consultant should be able to temporarily deactivate his/her account for a given period. During that period, his profile would not be accessible in the search bar.	

Consultants	Profile advertising	There should be a button within a consultant’s profile where he can simply click on to advertise his/her profile. This can be performed by paying $50 for a week. What this does is that, when the consultant pays $50 dollars for a wee, her/his profile would come at the top of the search. Remember that this doesn’t guarantee that the consultant would get more works. It simply increases your chances to get ones. Getting more works depends on numerous factors. For example: hourly rate, presentation of your profile, previous experience, etc..	
Social networks	Social networks	In the footer, there should be links to Parvis social pages: - LinkedIn - Facebook - Instagram Links to those pages will be provided later.	
Dashboard for Pradvis	Pradvis’s Dashboard	There should be a dashboard for Pradvis with at least the followings KPI: - Total number of professional services requested on the platform per month /year - Number of professional services requested for a budget below $1K per month/year - Number of professional services requested for a budget equal to or above $1K per month/year	Appendix XII

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		- Total fees collected per month/year - Total fees to be collected (Pending fees for professional services being performed…)	
Home Page	Quotes	The Home page should include 2 quotes: - One from a consultant, - And one from a small business owner	
Snippet of Code	Cookies	- Snipped of code to be installed for cookies	
Code for tracking	Code to be installed	Code should be installed so I can track the website using analytics tools. - Code for google analytics - Code for LinkedIn analytics (Insight tags)	

Welcome Message	Welcome message	For both a consultant and a business owner, once the profile is created, a welcome message should be sent to their inbox, which should include: - The 2 types of professional services he can provide/receive (Below $1k/More than $1K) - Encourage them to follow us on LinkedIn and Facebook (To provide links to both LinkedIn and Facebook) - Etc..... -	
Page loading	Page loading	- The landing page should load in less than 30 second.	
SMS	SMS service	To allow a user to activate an sms service so that he can receive updates regarding for example: - A consultant may receive an update when a business owner sends him/her assign him/her a Professional service - A consultant may receive an sms when for example a business owner upload a new document in the workspace for a given Professional service - A business owner may receive an sms when an sms a consultant makes a request for documents in the workspace. - There should be a quick way for the user to deactivate this sms.	
Unpaid bills	Automatic bills: Depending on the payment terms	The system should be able to send automatic reminders to business owners when the payment terms: - Two weeks before the payments terms date - A week before the payment terms date - 2 days before the payment terms date - A day before the payment terms date - The date of the payment terms - The next date, if the bill is still unpaid, a debit of the business owner account is performed by the system. The consultant is paid and Pradvis' service fees is taken.	

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Key differentiators with the competition:

- Consultants are actual full-time employees in consulting, but would like to secure an additional income source during their spare time
- Professional background check is performed for consultants who make the request
- Our fees are low compared to the competition
- There will be a second service type to offer to business owners if their budget for a given project is at least $10 000. Here is how it will work: ✓
    The business owner would fill a form on the platform with the budget, description of his project, and so on
    ✓ Next, Pradvis will contact him to better document his needs
    ✓ Then, Pradvis will connect him with the right candidates against a small fee. The advantage of this service is that the business owner doesn't have to go through all the lengthy process of interviewing tons of candidates whose professional background are difficult to validate.

✓ Note: For now, this service not part of this web development you will be working on. We will integrate this service later after raising capital..