



NUMBER ONE
BARBIER

BTM 496 - PART 1, 2 & 3

INFORMATION TECHNOLOGY STRATEGY,
MANAGEMENT, AND SOURCING

PROJECT FINAL DOCUMENTATION

NUMBER ONE BARBERSHOP



CONCORDIA UNIVERSITY
JOHN MOLSON SCHOOL OF BUSINESS

Executive Summary

Number One Barbershop, located in downtown Montreal, currently faces operational inefficiencies due to reliance on fragmented IT systems and manual processes. These inefficiencies affect critical business functions, such as appointment scheduling, payment processing, and inventory management, resulting in slower operations, reduced service quality, and limitations in scaling the business effectively. To address these challenges, this report recommends implementing a centralized Software-as-a-Service (SaaS) solution to streamline operations, enhance service efficiency, and support long-term growth.

The SaaS solution will consolidate booking, payments, and inventory processes into a single platform. Key features include real-time appointment scheduling with automated notifications, multi-device accessibility, integrated payment options, and automated inventory tracking with alerts. By automating these processes, the barbershop can eliminate manual errors, improve accuracy, and enhance the overall customer experience. Additionally, the system will enable data-driven decision-making by providing access to analytics for customer preferences, inventory trends, and service performance. With a budget of \$14,817.60 CAD, the SaaS model offers an affordable and scalable solution tailored to the barbershop's needs.

An evaluation of vendors was conducted to ensure the chosen system aligns with the barbershop's operational and financial requirements. Five vendors—Square, Squire, Fresha, Phorest, and Vagaro—were assessed based on their capabilities, total cost of ownership, and suitability for the grooming industry. Square and Fresha provide robust booking and payment solutions, with a focus on user-friendly interfaces and scalability. Phorest and Vagaro offer additional marketing tools and advanced inventory management features but require higher subscription fees. Squire emerged as the best choice, as it meets all mandatory requirements, offers industry-specific features, and delivers superior support for barbershop operations, including commission tracking, multilingual interfaces, and compliance with data privacy standards.

Squire's system ensures seamless integration with minimal disruption during implementation. Its vendor-provided support includes data migration, training for staff, and ongoing system updates, ensuring a smooth transition and long-term reliability. The SaaS platform's scalability will allow Number One Barbershop to expand its services and client base while maintaining efficiency and quality.

By adopting this solution, the barbershop can improve service delivery, reduce operational bottlenecks, and enhance customer retention. The system will position Number One Barbershop to achieve sustained growth, align its operations with its premium service goals, and strengthen its competitive position in Montreal's grooming industry.

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PART I

1. Business Overview & Strategy

1.1. Company Background

Located in Downtown Montreal, Number One Barber Shop was successfully founded by Moe and Massoud in January 2023. As experienced barbers with a loyal customer base, they decided to establish their own independent business. Their shared mission is to provide top-quality grooming services while creating a unique space for their customers. Number One Barbershop is a community hub where connections are fostered. Located in the heart of downtown on Mackay street, they employ 5 qualified barbers in total and provide grooming services for men with a future goal to expand the service range and the client segment.

As of October 2024, the business structure has evolved, with Moe becoming the majority owner. This change has given him the role of general manager, granting him control over all strategic, operational, and technology-related decisions.

Given the barbershop's localized competitive landscape, Porter's Five Forces offers the best framework for understanding industry dynamics and competitor power. A PESTEL analysis is less applicable due to the limited macro-environmental impact, and a Value Chain analysis would not adequately address external competitive threats. The Five Forces analysis provides actionable insights for the client to address their specific market challenges.

1.2. Industry Structure

Threat of Entry

Supply-side Economies of Scale: In the barbershop industry, economies of scale are generally low. Most shops operate at a small scale, and cost advantages for larger players are minimal. Larger chains could negotiate a better deal and lower cost on supplies but it doesn't present a large advantage on the small players.

Demand-side Benefits of Scale: There is limited network effect or demand-side benefit of scale in the personal care services industry. Clients tend to choose barber shops based on quality, reputation, or location rather than the size of the business. Established shops with a strong brand or unique experience may attract a loyal customer base.

Capital Requirements: Initial capital requirements are moderate to low, mainly covering brick and mortar rent, some physical assets like barber chairs, mirrors, and basic grooming tools. This makes entry relatively easy, as the financial barrier is not prohibitive. High-end shops with a luxurious setup may need more capital, but the general entry level is accessible to small entrepreneurs.

Unequal Access to Distribution Channels: There is minimal barrier in terms of access to distribution channels for supplies. Barber shops can procure grooming products and equipment from a variety of local suppliers or e-commerce marketplace with an omni-channel.

Restrictive Government Policy: There are some regulatory requirements in Montreal, such as obtaining a barber's license and adhering to health and safety regulations, but these are not particularly restrictive. This makes entry feasible for new businesses without significant government-imposed barriers.

Power of Supplier

Supplier Concentration: Suppliers in this industry are generally not concentrated. Barber shops have access to a wide range of product suppliers, from major brands to local distributors, which limits supplier power.

Switching Costs: For barbershops, switching costs related to suppliers are generally low. Most grooming products (such as razors, clippers, etc) are commoditized. They can change suppliers without major disruptions or additional costs. This means that new entrants can easily access similar suppliers. However, an exception exists for shops using premium or exclusive products that are marketed as part of their value proposition.

Differentiation of Inputs: While some shops may rely on specific premium products (e.g., high-end hair products or specialized tools), most grooming products are interchangeable, reducing supplier bargaining power. For premium products, however, suppliers might hold moderate power due to brand reputation.

Power of Customer

Customer Concentration: Individual customers have high bargaining power as they can easily switch shops. The market is highly fragmented, so no single shop holds a significant portion of market share, leading to a competitive landscape where customers have numerous options.

Price Sensitivity: Customers are highly price-sensitive, especially in areas with numerous barbershops. Shops often compete on price, discounts, or additional services to attract clientele. However, premium shops may attract less price-sensitive customers who prioritize experience over cost.

Customer Switching Costs: As mentioned, switching costs are very low. Customers can try new shops without any financial or significant time commitment, amplifying their bargaining power and putting pressure on shops to differentiate themselves through quality or unique offerings.

Threat of Substitutes

Availability of Substitutes: Substitutes such as unisex salons, at-home grooming kits, and mobile barbers are readily available. Self-service options can serve as cost-effective alternatives, especially for customers with simple grooming needs.

Relative Price-Performance: At-home grooming kits, although a lower-cost alternative, might not match the quality or experience provided by professional barbers. However, they can be attractive for

price-sensitive customers and ones with simpler grooming needs. Additionally, other personal care options, such as spas and salons, offer a broader range of services that might lure away customers seeking a more luxurious experience.

Threat of Rivalry

Number of Competitors: The barbershop industry in downtown Montreal is fragmented, with numerous competitors. This intensifies rivalry as shops compete for a limited customer base.

Rate of Industry Growth: The industry grows slowly, mainly driven by population growth and male grooming trends. This slow growth intensifies competition as businesses fight for a limited pool of customers, often focusing on retention and differentiation.

Product Differentiation: Barber shops offer relatively standardized services, but differentiation can come through ambiance, quality of service, location, or additional offerings like facial masks or scalp treatments. Shops that create a unique customer experience can reduce the impact of rivalry by attracting and retaining loyal customers.

Fixed Costs: Fixed costs are moderate, including rent and equipment maintenance. In high-traffic downtown areas, rental costs can be substantial, making it imperative for shops to retain a steady flow of customers to cover these costs. This encourages rivalry, as shops strive to maintain occupancy and cover their overheads.

Exit Barriers: Exit barriers are low, as barbershops don't require large upfront investments in specialized equipment. This ease of exit can lead to frequent turnover, with new shops replacing those that fail to attract sufficient clientele, sustaining high competition.

Thus we conclude, the personal care services and barbering industry in Montreal is generally considered **an unattractive industry**, given the low barrier to entry, strong customer power and intense power of rivalry, despite the relatively weak influence of suppliers.

1.3. Business Strategy

1.3.1. Scope of Target Market

Currently, Number One Barber Shop exclusively serves male clients. Although they plan to expand their services to women in the future, this analysis will focus solely on their existing male clientele. The services provided to this segment include a range of options, either individually or in combination: haircuts (for both short and long hair), beard trims, and facial masks.

As a medium-sized barbershop, Number One primarily serves clients within an approximate 1.5 km radius (Appendix A), with some exceptions for out-of-town visitors travelling through Montreal. The age demographics of their clientele are diverse, mostly young men aged 15 to 35 years older, although a significant portion consists of students under the age of 25 due to the barbershop's proximity to Concordia University's campus.

This niche market focus—men within the local community seeking both traditional and specialized grooming services, places Number One Barber Shop within a **narrow market scope**.

1.3.2. Competitive advantage

Number One Barber Shop emphasizes delivering standard services at highly competitive prices. While the average price for a men's haircut is \$56, they charge only \$33 for the same service and \$56 for hair and beard service. Their offerings are quick and efficient, enhanced by a subtly elevated atmosphere and a complimentary coffee experience. This balanced approach gives them a unique competitive advantage, combining affordability with select premium touches to attract cost-conscious customers seeking a pleasant grooming experience.

Therefore, Number One Barber Shop business strategy best fits the **Focused Cost Leadership** model, where they provide cost-effective services to a narrow, defined customer segment. They utilize a mix of affordability with select differentiating features to meet the needs of local, male clientele seeking quality yet affordable grooming services.

1.4. IT Strategy & Governance

1.4.1. IT Strategy

Number One Barber Shop leverages technology to support its business objectives; however, it has yet to fully tap into the potential of these resources to align IT initiatives with the broader business goals and strengthen its competitive edge. Key pain points in its strategy, particularly those impacting efficiency and automation, were identified and summarized in the analysis conducted for BTM 481.

For its 'Booking & Scheduling' subsystem, our client uses a free online appointment scheduling software called Setmore. This platform displays the business's services along with each barber's available schedule, and integrates with the website, allowing customers to book appointments directly. The website itself is built and maintained by a freelance contractor hired by the owner, who also oversees digital marketing efforts through SEO optimization with targeted keywords. To build reach and increase brand awareness, the owner personally manages the business's sole social media platform, Instagram.

For both the 'Payment & Commission' and 'Inventory Management' subsystems, few IT solutions have been implemented. These areas are primarily managed manually; inventory, for example, is handled on an ad-hoc basis. The owner calculates tips and commissions daily using pen and paper, occasionally cross-referencing with Setmore reports to identify any discrepancies. Currently, only cash payments are accepted, with a third-party ATM available on-site if needed. Regarding inventory, there is no database to track products or stock levels, leaving the owner solely responsible for remembering and reordering supplies as needed, though this is done irregularly.

1.4.2. IT Governance

Moe, the owner of Number One Barber Shop, serves as both the business and IT decision-maker, aligning his choices with the barbershop's goals while managing IT resources. With full control, he also assumes complete accountability for outcomes. However, there is a notable absence of IT documentation, IT policies, performance metrics, and risk measurement processes. The owner occasionally and sporadically self-assesses the IT alignment with business strategy. Since all IT decision rights are centralized with a single leader, Number One Barber Shop aligns closely with the **IT Monarchy model**. Given the business's limited resources and simpler IT requirements, this approach generally serves our client well, although the lack of formal IT mechanisms is a drawback.

2. IT infrastructure, IT personnel, & Business Users

2.1. IT Infrastructure

Hardware: Number One Barbershop's IT infrastructure is limited, primarily because their business operations are mostly hands on. The hardware available to the business includes an ATM installed at the shop and a laptop located at the service desk that is shared between all personnel. The laptop is based on the Windows operating system, providing compatibility with a wide range of software solutions. The rest of the devices used by the business are personal.

Software: The business depends heavily on third-party SaaS solutions for its software needs, specifically Wix.com and Setmore. Wix.com serves as the platform for the barbershop's landing page and hosting services. For managing business operations, they rely on the freemium version of Setmore. This SaaS solution is primarily used as a booking system and organizational tool. Setmore stores information about employees, offered services, pricing, and past bookings, essentially functioning as the business's primary database.

Setmore, a SaaS provider based in Portland, Oregon, offers a freemium model that is well-suited for small businesses like Number One Barbershop. It provides essential services such as appointment booking and employee scheduling while also managing data security and compliance. This reduces the barbershop's need for in-house IT management. With fewer than 100 daily users, Setmore's cloud-based infrastructure is sufficient for handling Number One Barbershop's peak periods without performance issues. Furthermore, the platform is scalable, allowing easy upgrades to premium tiers if the barbershop's needs grow.

Other: Currently, Number One Barber Shop does not have any other IT facilities or configured networks. However, they do maintain physical storage to keep track of completed services, where they record payments, tips, and cash distribution among the barbers and the owner.

2.2. IT Personal

As mentioned above, Number One Barber Shop follows an IT Monarchy model, where all decisions are made by the owner and manager, Moe. Although Moe is responsible for making all IT-related decisions,

he lacks technical expertise. With no dedicated IT staff at the barbershop, any changes or technical issues require consultation with a third-party service provider.

2.3. Business Users

Internal: There are six internal users, divided into two roles. The manager serves as the superuser with full access to all system functionalities, including managing schedules, viewing all appointments, and overseeing business operations. The barbers have limited permissions, allowing them to view, update, and create personal appointments. The manager retains control over the barbers' work schedules, adjusting them as needed.

External: The business's website and booking platform receive fewer than 100 daily visits on average. During peak times, the number of simultaneous users does not exceed 50, which ensures that the platform runs smoothly without causing performance issues or server strain.

3. Business Processes & Project Scope

3.1. Scope

The primary goal of this project is to implement a comprehensive IT solution to streamline and optimize Number One Barbershop's operations by automating key functions, including Booking & Scheduling, Payments & Commission, Inventory Management, and customer relationship management (CRM). This solution will be a single, all-encompassing platform, with potential integration of additional services, such as POS or accounting systems, to support its full functionality. The barbershop aims to improve its efficiency, financial accuracy, and customer engagement through this structured approach, which will include specific deliverables, implementation steps, and an awareness of limitations.

Deliverables:

- Booking System – A user-friendly system that coordinates customer bookings, manages staff schedules, and enhances communication with automated appointment reminders and confirmations.
- Payment Processing System – A modern payment solution that integrates multiple payment methods (e.g., cash, card, mobile payments) while accurately tracking transactions, tips, and commissions.
- Inventory Management System – An automated system that tracks product usage, and stock levels, and triggers timely reordering to prevent overstocking or running out of supplies.
- Customer Relationship Management (CRM) System – A tool that stores customer data, tracks preferences, and supports personalized interactions and targeted marketing campaigns.

Implementation Steps:

- Initial Business Analysis – Conducted a detailed assessment of current operations, identifying pain points and inefficiencies in booking, payment processing, inventory, and customer interactions.

- System Selection and Customization – Identify and evaluate various software solutions that fit the barbershop's needs. This phase will involve selecting vendors and customizing each system to ensure it meets specific business requirements (e.g., handling unique booking demands or inventory types).
- Integration and Testing – Implement the selected systems and integrate them into the existing infrastructure. Testing will be done in stages to ensure smooth operation, starting with a trial phase for each system, followed by full deployment. This phase will also involve staff training to familiarize employees with the new tools.
- Data Migration and Go-Live – Transfer existing customer data, appointment histories, and inventory details into the new systems. The systems will go live once testing and migration are complete, with real-time tracking and monitoring to catch any issues.
- Post-Implementation Support – Provide ongoing technical support and system maintenance to ensure the smooth operation of the new systems. Monitor performance and gather feedback for further optimization.

Limitations:

- Financial limitation: The limited initial budget could restrict the choice of the solution potentially requiring to opt for less feature-rich systems or not fully integrate the additional customization.
- Time for Training and Adjustment: Introducing new systems may require significant time for staff to adjust and learn. While this is factored into the project, it could temporarily affect daily operations or service quality during the transition period.
- Limited IT Infrastructure: The barbershop's current IT infrastructure, including internet connectivity and hardware, will remain as is. The project will not involve recommending or delivering any changes to this infrastructure, though its condition may affect implementation timelines or costs.

While limitations such as budget and integration challenges exist, a phased and structured approach will ensure the successful delivery of the project and its long-term benefits to the business.

3.2. Time

The project started with 12 weeks of analyzing the business during BTM 481. After identifying three main subsystems and the subsequent bottlenecks; the project is ready to be moved on to developing a sourcing strategy phase. Thus we could be looking at the following next steps:

- Research Vendors (2-3 Weeks)
- Evaluate Options (1-2 Weeks)
- Create Sourcing Plan (2 Weeks)
- Present Strategy (1 Week)

3.3. Budget

According to Computer Economics, a leading IT research firm, retail businesses should allocate 1.2% - 3% (Appendix B) of their yearly revenue towards their IT budget. When looking at Number One Barbershop's financial capabilities and applying Computer Economics's ratios (Appendix B), the IT budget should be set between \$5,927.04 on the lower end and \$14,817.6 on the higher end.

3.4. Processes

The business processes at Number One Barber Shop can be separated into three main subsystems, which are:

3.4.1. Booking and Scheduling Subsystem

Process Overview:

- Customer inputs details such as desired service, preferred time, and barber selection.
- The system checks barber availability and books the appointment, automatically sending reminders to both the customer and the barber.

Data Flow:

- Customer data flows into the system to generate and store appointment records, which are updated based on real-time availability.

3.4.2. Payment and Commission Subsystem

Process Overview:

- Payment Collection: Customers make payments directly to their barbers either in cash at the barber's station or at the cash register. If a customer does not have cash, they are directed to an ATM within the shop that charges a \$3 service fee, which the barbershop often absorbs to maintain customer satisfaction.
- Transaction Recording: After payment is collected, barbers record transaction details in their individual physical service books, known as "Barber #1 Service Book." This record includes the date, type of service provided, total payment amount, and any tips received. For card payments, the POS system generates an electronic receipt, while cash payments may result in a handwritten receipt that is not stored.
- Daily Reconciliation: At the end of each day, the owner reconciles the transaction data from the physical service books with records from the booking system. This process ensures that all transactions are accurately logged, helping to identify any discrepancies.
- Tip and Commission Calculation: Barbers keep 100% of their tips and are compensated based on a 60/40 commission split of the service fee. Daily tips are calculated and paid out to barbers, while commissions are reconciled and distributed bi-weekly.

Data Flow:

- Input: Customer payment details, including service type and payment amount, are recorded in the physical service books.
- Processing: Data from the service books and booking records are cross-referenced during daily reconciliation to ensure accuracy. The owner verifies completed services against recorded payments to calculate total tips and commissions.
- Output: Daily tip payouts are distributed to each barber, and bi-weekly commissions are processed based on the reconciled data, ensuring accurate compensation for services rendered.

3.4.3. Inventory Management Subsystem

Process Overview:

- The inventory management subsystem allows barbers to monitor their stock of grooming products. When supplies run low, barbers inform the owner, who checks inventory levels and places orders with suppliers as needed.”Specify done manually and no data store”

Data Flow:

- Usage data from products flows informally through verbal requests for replenishment. The owner processes these requests by checking inventory and placing orders.

4. Business Problem, Causes, & Consequences

4.1. Main problem

Number One Barbershop’s IT system is not centralized and has limited functionalities to meet its operational needs. The current processes are manual and segmented, reducing efficiency and preventing the business from delivering a high-quality service experience aligned with its desired premium brand image.

4.2. Cause

The fragmented IT infrastructure at Number One Barber Shop is due to the absence of a centralized system to manage key operations such as bookings, payments, and inventory. This results from resource limitations, including the owner’s lack of technical expertise and reliance on outdated manual processes. Minimal investment in technology and the use of disconnected tools have further compounded inefficiencies, leaving operations unorganized and unintegrated.

4.3. Consequence

The business faces the following consequences as a result of these causes:

- Customer Dissatisfaction: limited payment options frustrated customers, especially those who do not have cash since they have to pay a fee at the ATM
- Operational inefficiencies: manual processes slow down tasks such as appointment scheduling, payment reconciliation, and inventory tracking, increasing the risk of human error.

- Growth Limitations: inefficient systems make it difficult to scale operations or introduce new services, restricting the barbershop's ability to grow.
- Brand inconsistency: the gap between the shop's desired premium image and the actual service delivery weakens customer loyalty.

5. Functional and non-functional needs and requirements (Budget)

User requirements is a major factor in the improvement of the barbershop's system, helping to make sure that the system serves the needs of the owner, the clients and barbers. After classifying requirements into functional and non-functional groups, we further divided them into mandatory and non-mandatory categories based on how important they are to the functioning of the system.

5.1. Booking and Scheduling

Functional Requirements:

- **Input availability (Mandatory):** The system must allow barbers to update their availability when they are unavailable for appointments.
- **Customer details (Mandatory):** Customers must provide personal and booking details, such as name and contact information, to initiate an appointment request.
- **Walk-in booking (Mandatory):** The system must allow walk-in customers to negotiate bookings with the owner or attending barber, suggesting alternative time slots if necessary.
- **Placeholder booking (Mandatory):** The system must enable barbers to create a 'walk-in' booking for customers arriving without an appointment.
- **Booking confirmation (Mandatory):** A confirmation of the booking must be sent to both the customer and the barber after the appointment is finalized.
- **Credit card information (Non-Mandatory):** The system should require customers to provide credit card information at the time of booking to secure appointments and avoid no-shows.

Non-Functional Requirements:

- **Real-Time Appointment Reconciliation (Mandatory):** The system must update booking data in real time, reducing the need for manual logs and ensuring accurate availability across barbers.
- **Performance (Mandatory):** The system must handle high volumes of booking requests efficiently, ensuring minimal wait times for customers.
- **Reliability (Mandatory):** The system must ensure that appointments are not lost or double-booked.
- **Security (Mandatory):** Customer and booking information must be stored securely, with access restricted to authorized personnel only.
- **System Uptime and Reliability (Mandatory):** The system must maintain at least 99% uptime, ensuring continuous operations and minimal downtime during updates.

- **Usability (Non-Mandatory):** The booking process should be user-friendly, requiring minimal training for both barbers and customers.

5.2. Inventory Management

Functional Requirements:

- **Inventory check (Mandatory):** The owner must be able to initiate an inventory check to assess stock levels, pulling current levels from the physical storage.
- **Ordering (Mandatory):** The owner must be able to order inventory from the preferred vendor, with order details provided to the vendor.
- **Automated Inventory Alerts (Mandatory):** The system must automatically send restock alerts when inventory falls below a predefined threshold, ensuring the barbershop is always stocked with necessary supplies.

Non-Functional Requirements:

- **Efficiency (Non-Mandatory):** The inventory management process should be efficient, reducing the need for excessive manual intervention.
- **Accuracy (Non-Mandatory):** Inventory checks and ordering processes should be accurate, preventing overstocking or stockouts.

5.3. Payment and Commission

Functional Requirements:

- **Payment processing (Mandatory):** Customers must be able to make payments using their preferred payment method.
- **Receipt issuance (Mandatory):** A receipt must be issued to the customer upon request, detailing the service, total cost, and change given, if any.
- **Commission calculation (Mandatory):** Barbers' commissions must be calculated bi-weekly based on services provided, with the shop owner's commission reflecting their share of earnings.
- **Tips recording (Mandatory):** Tips received by barbers must be recorded daily with the services rendered, ensuring no discrepancies or data loss.

Non-Functional Requirements:

- **Accuracy, (Non-Mandatory):** The system should accurately calculate service costs, tips, and commissions, ensuring no errors in financial transactions.

5.4. General User Requirements

Functional Requirements:

- **Customer Profile Management (Mandatory):** The system must allow staff to store and access customer profiles, including tracking customer preferences and service history, to offer a personalized experience and improve customer engagement.
- **Intuitive Interface:** The system should be easy to navigate for both the owner and employees, requiring minimal training for staff.
- **Multilingual Support:** Given the business's located in Quebec, the system must support both English and French to ensure seamless interaction for staff and customers.
- **Responsive Customer Support:** Access to 24/7 customer service for technical assistance to reduce downtime and disruptions
- **Mobile Accessibility:** feature optimized for mobile devices to allow staff to manage bookings, payments, and inventory remotely when necessary.

Non-Functional Requirements:

- **System Uptime and Reliability (Mandatory):** The system must maintain at least 99% uptime, ensuring continuous operations and minimal downtime during updates.
- **Data Security and Privacy Compliance (Mandatory):** The system must allow for secure storage and processing of customer and transaction data, complying with relevant privacy regulations.
- **Multi-Device Access (Mandatory):** The system must support access from multiple devices, including desktops, tablets, and smartphones, for both staff and customers, ensuring a seamless experience across all platforms.
- **Scalability (Mandatory):** The system must be scalable, allowing it to support a growing number of users, appointments, and transactions without performance degradation, ensuring that the business can easily expand its operations without the need for major system overhauls.

5.5. Budget Breakdown

The total IT budget for Number One Barbershop's new system is \$14,817.60 CAD, which includes a 10% contingency fund to address unforeseen expenses. The allocation aligns with the recommendation from *Computer Economics*, which suggests that retail businesses dedicate 1.2% to 3% of their annual revenue to IT investments. Please refer to Appendix C for a breakdown of the budget.

The IT budget covers four main categories:

- **Point of Sale (POS) System** for managing transactions, bookings, and inventory.
- **Software Licenses and Subscriptions** for essential operational tools.
- **Website and Online Presence** to support marketing and online bookings.

By consolidating these elements, the system avoids fragmentation and meets the stated objectives effectively. Number One Barbershop's spending capabilities over 5 years would estimate a \$14,800 budget per year, including:

- Setup Costs: Initial customization and implementation fees tailored to business workflows
- Recurring Subscription Fees: SaaS licensing costs to provide scalability

- Maintenance and Updates: regular vendor support and system updates included in the subscription.

This TCO ensures that the budget supports a solution that enhances operation efficiency while remaining financially feasible. These categories aim to enhance efficiency and address key business needs. For more details, see Appendix C.

6. Recommended Improvements to The Business Processes

For Number One Barber Shop to fully benefit from a new IT system, several business processes need to be optimized before implementation. Using the PIECES framework can help identify necessary improvements to streamline operations, enhance customer satisfaction, and prepare for the new system's integration.

Performance

To improve the business's performance, it is crucial to standardize the information flow in appointment scheduling. The current **Setmore** system is sufficient for basic bookings but lacks integration with payments and inventory. Implementing a standardized data entry process that requires consistent customer contact information, service preferences, and appointment notes will ensure that booking data is accurate and up-to-date. Additionally, automating inventory alerts and implementing real-time reconciliation for payments will reduce manual processing time and ensure continuity of service. By standardizing data collection across appointments, payments, and inventory, the barbershop can implement consistent protocols that allow for better analysis and reporting once the new IT system is in place. Automating tasks such as appointment confirmations, payment receipts, and inventory restocking notifications will further reduce administrative burdens and enhance performance.

Information

Improving information flow is key to increasing operational efficiency. Number One Barbershop's reliance on manual logs and disconnected software can be resolved by centralizing data within a unified system. Consolidating booking, payment, and inventory data into a single platform will streamline cross-functional processes, improve data accuracy, and support data-driven decision-making. This will help the barbershop better manage inventory restocking, peak time scheduling, and customer engagement, enabling more seamless operations across all business areas.

Economics

The current manual reconciliation process for payments and inventory consumes valuable time that could be better spent on revenue-generating activities. By automating reconciliation in the new IT system, Number One Barber Shop can significantly reduce labor costs and allow staff to focus more on customer service. Additionally, real-time inventory tracking will help minimize overstock or stockouts, optimizing

costs associated with procurement and waste. These operational efficiencies will allow the barbershop to reinvest savings in marketing, equipment upgrades, or additional staff training, further enhancing overall profitability.

Control

Introducing control mechanisms in inventory and payment processes will ensure more effective use of resources. For example, automating inventory restock alerts when supplies fall below a threshold will eliminate human error and ensure that necessary products are always available. Additionally, adding transparency to the payment and commission calculation process by tracking barbers' tips and commissions digitally will reduce errors, improve staff satisfaction, and enhance accountability. These control enhancements will streamline operations and provide the owners with greater oversight of the business.

Efficiency

Efficiency gains can be achieved by integrating appointment scheduling, payment processing, and inventory management into a single IT system. This consolidation reduces the need to toggle between multiple tools or update physical logs, allowing staff to work more productively. Automating customer notifications such as appointment confirmations, reminders, and follow-ups will save time on manual calls, increase client attendance, and reduce last-minute cancellations, further improving operational efficiency.

Service

Improving service is vital to maintaining Number One Barbershop's reputation. The new IT system can help enhance the customer experience by offering personalized services, faster payment processing, and automated appointment reminders. By keeping detailed records of customer preferences, services provided, and appointment history, the barbershop can offer a more personalized experience, driving customer loyalty and repeat business. Furthermore, the system can streamline the booking process by allowing customers to book services online, reducing wait times and providing more convenience.

Key Action Items Before System Implementation:

- **Data Cleansing:** Clean up existing customer, inventory, and financial records to ensure only accurate data is migrated to the new system.
- **Process Automation:** Identify tasks that can be automated, such as appointment confirmations, payment receipts, and inventory management.
- **Training:** Prepare barbers and staff for the new system by offering pre-implementation training on process changes and the benefits of automation.
- **Standardization:** Implement standard protocols for data entry and management across the barbershop, ensuring consistency in all areas before migrating to the new system.

7. Analysis of The Various sourcing Options

There are various sourcing options for implementing a new IT system at Number One Barbershop, these options include Buying Off-the-Shelf Software, leasing a Third-Party Solution, and Developing In-House Below. In order to pick which option Number One Barber Shop should adopt, a detailed comparison of each option's advantages and disadvantages is necessary, including factors such as cost, implementation time, scalability, customization, control over data, and long-term sustainability. By weighing the short-term and long-term impacts of each option on the barbershop's operations, growth potential, and financial health, the most suitable IT solution can be selected to optimize business processes and support future expansion.

Option 1: Buying Off-the-Shelf (OTS)

Advantages

- Full Ownership and Customization: Buying an OTS solution gives Number One Barber Shop complete ownership, enabling them to fully tailor the system to meet specific business needs.
- No Recurring Fees: This option eliminates ongoing leasing payments, potentially reducing costs over the long term. (Sapra, 2024)
- Data Security and Control: Full ownership provides autonomy over data security measures, allowing the business to ensure privacy and regulatory compliance directly.

Disadvantages

- High Upfront Cost: Purchasing an OTS solution demands a significant initial investment, which can strain financial resources. (Sapra, 2024)
- Responsibility for Maintenance: The barbershop would be responsible for system updates and maintenance, likely requiring dedicated IT staff or third-party support.
- Longer Implementation Timeline: Customization and training may extend the implementation timeline, delaying the realization of benefits.

Number One Barber Shop would have complete control and flexibility over the system if they choose to use an off-the-shelf (OTS) software solution. This would allow them to adapt the program to meet their unique business requirements, including managing inventory, scheduling appointments, and processing payments. Their financial resources may be first stretched by the substantial upfront payment, but the lack of recurrent fees may lower long-term costs. The barbershop would need to designate workers or employ third-party IT assistance for system maintenance, updates, and troubleshooting. The system's full benefits might not be observed instantly given that the deployment process will be slower and will take longer because of staff training and customisation needs. When the system becomes completely functional, though, it would provide better control, data protection, and a tailored match for their business processes. The expected implementation time for an Off-the-Shelf (OTS) software solution typically ranges from 3 to 6 months, depending on the level of customization required and the complexity of the system.

If Number One Barber Shop adopts Off-the-Shelf (OTS) software, it will incur initial costs that range from \$8,000 to \$40,000 in the first year, with ongoing maintenance fees of \$1,000 to \$5,000 annually. Although the upfront investment is higher, the system offers long-term control, and with proper use, it can deliver steady operational improvements, resulting in increased efficiency and customer satisfaction. The ROI will depend on how effectively the software enhances booking, payments, and inventory management, which could lead to 10-15% operational savings and increased revenue.

Option 2: Leasing Software-as-a-Service (SaaS)

Advantages

- Low Initial Cost and Fast Deployment: Leasing SaaS requires minimal upfront investment, enabling rapid implementation and reducing the burden on cash flow.(Grant & Perez, n.d.)
- Vendor Support and Regular Updates: SaaS providers manage updates, maintenance, and support, reducing the need for in-house IT resources.
- Scalability and Flexibility: SaaS solutions are easily scalable, allowing features and capacity to be adjusted according to business needs as the barbershop grows.

Disadvantages

- Long-Term Costs: Ongoing leasing fees can accumulate, potentially exceeding the cost of a purchased solution over time.
- Limited Customization: SaaS platforms may have restrictions on customization, making it difficult to fully tailor the software to the barbershop's specific needs.
- Vendor Dependency: Relying on a third-party provider poses a risk if service quality, security, or support availability doesn't meet business expectations. (Grant & Perez, n.d.)

If Number One Barber Shop implements a Leasing Software-as-a-Service (SaaS) solution, the business would benefit from a rapid and cost-effective setup, allowing operations to shift easily to the new system without a substantial upfront investment. The SaaS approach would eliminate the need for specialized IT staff by offering ongoing vendor support along with regular maintenance and updates that are handled externally. The barbershop would be able to focus on daily operations while yet having the option to scale the system as its clientele expands. But eventually, the recurrent lease fees can end up being more expensive than buying the system entirely, and the barbershop would not be able to accurately customize the program to meet evolving demands due to limited customization options. Furthermore, since a third-party supplier is used, any interruptions in services, and security could impact the businesses operations. Despite these risks, the rapid deployment and low upfront cost make SaaS an attractive short-term solution for the business. The expected implementation time for a Software-as-a-Service (SaaS) solution is typically much shorter compared to other options, such as developing in-house or buying off-the-shelf software. The timeline for SaaS implementation could range from 2 to 8 weeks, depending on the complexity of the system and the amount of customization required. (Grant & Perez, n.d.)

If Number One Barber Shop adopts Software-as-a-Service, the first-year costs are lower, ranging from \$3,700 to \$16,000, with annual subscription fees of \$1,200 to \$6,000. SaaS provides a quicker implementation and regular updates at a lower upfront cost. While long-term costs could accumulate, SaaS delivers immediate efficiency gains. ROI is expected to be positive within 6-12 months, thanks to

reduced manual tasks and improved customer experiences, leading to potential 5-10% increases in bookings and revenue.

Option 3: Developing In-House

Advantages

- Full Customization: An in-house solution can be developed specifically to meet the barbershop's unique requirements, addressing every detail of its scheduling, payments, and inventory management processes.
- Control Over Features and Updates: Number One Barber Shop would have complete autonomy over system features, updates, and enhancements, ensuring alignment with business changes.
- Data Privacy and Security: Developing in-house gives the business full control over data security, minimizing risks related to third-party breaches.

Disadvantages

- High Development Costs and Time: In-house development requires substantial financial resources and time, often involving hiring specialized IT staff and incurring extended development timelines. (Altynpara, 2024)
- Ongoing Maintenance: The barbershop would need dedicated IT personnel or contractors to handle maintenance, updates, and technical support. (Altynpara, 2024)
- Risk of Obsolescence: Without continual investment in updates and improvements, the in-house system could become outdated as technology and business requirements evolve.

Number One Barber Shop would get total control over all facets of the system should they decide to develop an in-house IT solution. In order to make sure that the scheduling, payment, and inventory management systems are perfectly aligned with their unique business processes, the barbershop could adjust the software to meet their specific needs. As the company expands, this degree of customization would enable optimal efficiency and seamless feature integration. Furthermore, complete ownership over security, privacy, and improvements to the system would decrease the likelihood of third-party breaches and allow quick adjustments in response to internal changes. Nonetheless, there are a lot of obstacles involved in creating an in-house solution. A substantial financial and time investment would be required for the development process. The benefits of the new system would not be realized immediately as the barbershop must hire contractors or skilled IT staff to handle the design and construction, and the development timetable may take several months. Moreover, the system would need constant upgrades and maintenance after it was put into place, depleting resources continuously. If frequent changes aren't made, the system can soon age out and need more funding to stay up to date with changing business requirements and technological advancements.

For a small company like Number One Barbershop, creating an internal solution might not be the most practical or economical choice, even with the benefits of control and flexibility. For the first year (including development and maintenance), the total cost could range from \$180,000 to \$450,000, depending on the scale and complexity of the system. This is a substantial investment for a small business like Number One Barbershop. While the benefits of full customization and control are significant, the

high costs and extended development time make it a challenging option to pursue unless the barbershop has substantial capital and long-term growth plans.

Option 4: Outsourced Development

Advantages

- Cost Flexibility: Outsourcing provides scalable pricing, allowing the barbershop to pay only for the services it needs, reducing overhead costs associated with hiring full-time IT staff.
- Access to Expertise: The development is handled by experienced professionals with specialized skills, ensuring the solution is built with best practices and industry standards.
- Quicker Development Cycle: With a dedicated external team, the system can be developed faster than an in-house project, thanks to the vendor's pre-established workflows and tools.
- Reduced Resource Burden: Outsourcing minimizes internal resource allocation, enabling the barbershop's team to focus on operations while the vendor manages the technical aspects.
- Maintenance and Updates: Many outsourced providers include ongoing support, updates, and improvements as part of their service, ensuring the system stays current with minimal internal effort.

Disadvantages

- Limited Control: The barbershop may have less influence over development timelines, design choices, and priorities, leading to potential misalignments with business needs.
- Dependency on Vendor: Relying on an external vendor for critical systems introduces risks, such as service disruptions or difficulties if the vendor discontinues support.
- Data Privacy Risks: Sharing sensitive data with an external party may increase the risk of breaches or misuse if proper safeguards aren't in place.
- Customization Constraints: While outsourced solutions can be tailored, they may not achieve the same level of specificity as in-house development due to vendor limitations or communication gaps.
- Long-Term Costs: Ongoing development and support fees could accumulate over time, potentially exceeding the cost of an off-the-shelf or SaaS solution.

If Number One Barbershop opts for outsourced development, it will benefit from having a custom solution designed by professionals without the need to hire an in-house IT team. This option is well-suited for the barbershop's requirements as it balances customization with cost efficiency. The external team would handle the technical challenges, ensuring a faster and more professional implementation. Additionally, ongoing vendor support would ensure the system remains up-to-date with minimal internal effort. However, the barbershop must carefully choose a reliable vendor with proven expertise to mitigate risks related to data privacy and vendor dependency. Proper contractual agreements and service-level expectations must be defined to protect the barbershop's interests.

The estimated cost of outsourced development for a system tailored to Number One Barbershop's needs ranges from \$50,000 to \$120,000 for the first year, including development and initial maintenance.

Ongoing support costs are projected at \$5,000 to \$10,000 annually, making it a more affordable option compared to full in-house development. With proper vendor selection and contract management, outsourced development can deliver a robust and scalable system while allowing the barbershop to focus on its core operations.

By choosing outsourced development, Number One Barbershop can achieve a balance of customization and cost-efficiency, ensuring that the system meets its unique needs while avoiding the significant resource burden of in-house development. However, careful vendor assessment and a clear agreement on deliverables and support terms are essential to ensure the success of this sourcing option.

8. Justified Recommendation - Best Sourcing Option

The recommendation for Number One Barber Shop is to adopt a Software-as-a-Service (SaaS) model. This solution offers the company affordability, flexibility and a fast implementation. The SaaS option provides a low initial cost, making it a more budget-friendly option compared to the high upfront costs of purchasing an OTS system or developing a custom in-house solution. Also, SaaS can be implemented within 2-8 weeks, allowing the barbershop to implement improvements in appointment scheduling, payment processing, and inventory management. Additionally, the SaaS model eliminates the need for internal IT management, as all updates, maintenance, and support will be handled by the provider. This allows for Number One Barber Shop to focus on its core business operations and overall goals.

Adopting a SaaS-based IT solution will streamline operations while maintaining flexibility for future growth. Key features such as automated notifications for booking and inventory management will reduce manual tasks and improve efficiency. To ensure a smooth transition, it's important to train staff on the new system, which will enhance customer engagement by enabling faster, more efficient services. Monitoring customer data and inventory through centralized CRM and inventory tools will support data-driven decisions, helping the barbershop optimize its service offerings and inventory control.

Furthermore, SaaS addresses the barbershop's need for customer engagement by providing tools for seamless data collection, centralized customer profiles, and personalized interactions. With the integration of a payment system that supports various methods, customers will experience a smoother checkout process, boosting satisfaction and retention. While SaaS does involve ongoing subscription fees, these costs are predictable and include continuous vendor support, ensuring long-term reliability.

The SaaS model's combination of cost-efficiency, scalability, and minimal implementation disruption makes it the most strategic choice for Number One Barbershop's operational enhancement and future growth. Training staff on the system's features and benefits will ensure a smooth transition and optimal utilization, setting the barbershop up for sustained success.

PART II

1. Mandatory Requirements

The following table outlines the mandatory requirements for the new system, derived from the business requirements documented during the analysis phase, user stories, and the PIECES analysis results. To be considered for selection, any potential vendor solution must fully meet all the requirements listed. The table provides a description of each requirement along with the associated business benefits for Number One Barbershop.

Requirement	Description	Explanation
Budget	The total cost of implementing the vendor solution must stay within the specified budget allocated by Number One Barbershop.	Adhering to the budget ensures financial feasibility for Number One Barbershop, allowing the business to allocate resources effectively without exceeding its financial constraints.
Support Language	The system must support English and French for both customer and admin interfaces, with a toggle feature to switch between languages. All content will be available in both languages.	This ensures accessibility for English and French speakers, expands the customer base, complies with Quebec's bilingual requirements, and avoids fines from the "Office québécois de la langue française."
Barber Input Availability	The system must allow barbers to update their availability and customize their working hours, even if they differ from the default schedule.	This feature accommodates both full-time and part-time barbers, ensuring accurate booking hours for those with non-standard schedules.
Customer Details	The system must collect and store personal information for appointment bookings, including first and last names, contact details (email and phone number), and home addresses.	Collecting customer data supports future marketing efforts, enabling better targeting and optimized campaigns, which can increase engagement and improve ROI.
Walk-in Booking	The system must allow the owner or on-duty barber to book appointments for walk-in customers without requiring account creation or personal information entry.	This feature ensures seamless service for walk-in customers, increasing customer satisfaction and retention. It also enables efficient handling of spontaneous appointments and avoids data redundancy.

Booking Confirmation	The system must send a booking confirmation notification to both the customer and the barber once an appointment is booked.	Sending notifications enhances operational efficiency by reducing missed appointments and ensuring both parties are informed, ultimately improving customer satisfaction and service reliability.
Real-Time Appointment Reconciliation	The system must update booking data instantly to ensure accurate availability for all barbers. Changes such as bookings, cancellations, or reschedules must reflect in real time, eliminating the need for manual updates.	Real-time updates enhance efficiency and prevent double-booking, improving customer satisfaction. This streamlines scheduling, maximizes barber utilization, and ensures a seamless and reliable experience for customers.
System Performance	The system must efficiently handle high volumes of booking requests, ensuring minimal wait times for up to 10,000 users interacting on the platform during peak times and busy seasons.	Reliable performance during high-demand periods ensures a smooth and responsive user experience, increasing customer satisfaction and maintaining the barbershop's reputation for dependable service.
System Reliability	The system must securely save all scheduled appointments, ensuring they are visible to relevant users and preventing double bookings or lost appointments.	High reliability strengthens customer trust by guaranteeing secure, accurate appointments. It minimizes scheduling conflicts, reduces disruptions, and supports smooth barbershop operations.
Data Security and Privacy Compliance	The system must securely store and process customer, booking, and transaction data in compliance with relevant privacy regulations. It will implement encryption for data storage and transfer, secure user authentication, and access controls to restrict sensitive data to authorized users. Customer consent for data processing will be obtained, ensuring privacy and regulatory	A robust security framework reduces the risk of data breaches, protects customer trust, and prevents internal data leakage. Compliance with privacy regulations helps avoid legal penalties and safeguards the business's reputation, ensuring operational integrity and reliability.
System Uptime	The system must achieve at least 99% uptime, ensuring minimal downtime and uninterrupted access for staff and customers, even during maintenance or updates.	High uptime ensures customers can book appointments anytime, enhancing satisfaction and convenience. For staff, it supports seamless operations by minimizing disruptions caused by system outages.
Inventory Tracking	The system must monitor and manage inventory levels in real time, automatically updating stock counts with each sale or restock. A dashboard will display current	Real-time inventory tracking ensures accuracy, prevents overstock or stockouts, minimizes discrepancies, and supports better forecasting for efficient inventory management.

	inventory, with alerts for low stock thresholds to assist staff.	
Automated Notification	The system must automatically send reorder notifications when stock levels drop below predefined thresholds. Staff will have the ability to adjust these thresholds for each product as needed.	Automated notifications streamline procurement processes, prevent stockouts, and ensure consistent service reliability.
Product Categorization	The system must organize products into categories and subcategories, such as hair care, grooming tools, and accessories. This allows staff to filter views and generate targeted inventory reports.	Product categorization simplifies inventory management, enhances searchability, and supports sales trend analysis by category, aiding in informed decision-making.
Payment Processing	The system must support payments via cash, debit, and credit, both through the website and the on-site POS system, providing customers with their preferred payment options.	Flexible payment options enhance customer satisfaction, ensure convenience, and reduce transaction errors. The system will help capture more business, attracting a wider range of customers.
Receipt Issuance	The system must provide receipts to customers upon payment, detailing the service, total cost, and any change given. Receipts will be issued electronically for website transactions and as paper receipts for in-store payments.	Builds trust and transparency with customers, reduces discrepancies in payment tracking, and aids in financial record-keeping.
Commission Calculation	The system must calculate commissions and tips after each service and provide a bi-weekly breakdown of earnings and commissions. These calculations must integrate seamlessly into the barbershop's financial accounting to ensure accurate and timely payments to barbers.	Reduces administrative workload, minimizes payroll errors, and improves staff satisfaction with timely and accurate reports that streamlines accurate earnings.
Tips Recording	The system must enable barbers to record both cash and POS tips for services provided, ensuring accurate tracking of their total earnings.	Recording tips provides complete income tracking, improves transparency, simplifies end-of-day reconciliation, and ensures accurate earnings, fostering trust and accountability.
Multi-Device Access	The system must support access from desktops, tablets, and smartphones for both staff and customers. It will feature a responsive design that adapts to various screen sizes and orientations, enabling staff to manage appointments and customers to book services seamlessly across all platforms.	Multi-device access enhances flexibility and convenience, allowing customers to book services easily and staff to manage schedules efficiently from any device, improving user satisfaction and operational efficiency.

Scalability	The system must be scalable to accommodate an increasing number of users, appointments, and transactions without performance degradation. It will leverage a cloud-based infrastructure that allows resources to scale as the business grows, enabling expansion across locations, services, and the user base while maintaining consistent performance.	Scalability ensures smooth business growth, avoids the need for costly system overhauls, and prevents performance issues that could disrupt customer experience or operations, supporting long-term success and reliability.
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2. Budget

The total IT budget for Number One Barbershop's new system is \$14,817.60 CAD, which includes a 10% contingency fund to address unforeseen expenses. This budget covers both the initial implementation costs and operational expenses for one year. The allocation aligns with the recommendation from *Computer Economics*, which suggests that retail businesses dedicate 1.2% to 3% of their annual revenue to IT investments.

For a detailed breakdown of the budget calculations, refer to Appendix C. It is important to highlight that several assumptions were made to arrive at this figure. The revenue estimate is based on an 85% occupancy rate, reflecting the barbershop's early-stage operations (less than a year in business). Calculations were further based on the most requested service, 5 working barbers, and an average of 6 customers per day, with 49 operational weeks per year.

3. Vendor Analysis

3.1. Vendor Identification process

To identify the best potential solutions for Number One Barbershop, we followed a structured process. We began by leveraging Capterra, a trusted review platform, to evaluate barbershop-focused solutions. Additionally, we conducted a competitor analysis to understand the systems used by other barbershops in the area. Our focus was on solutions that met all mandatory requirements and effectively addressed the three key subsystems of the business: booking, payment, and inventory management. This approach ensured we shortlisted options tailored to the business's specific operational needs and market context.

3.2. Vendor Details & Processes

Vendor 1: Square

Background: Square, established in 2009 and headquartered in San Francisco, California, is a leading provider of financial and merchant services, specializing in payment processing and business solutions. Square Appointments, its scheduling software, is designed to streamline operations for service-oriented businesses, including barbershops. The platform offers features such as customizable booking pages, calendar synchronization, secure online payments, and social media integrations, enabling barbershops to manage appointments efficiently and enhance client booking experiences.

With over a decade of experience, Square has developed intuitive, user-friendly solutions tailored to the needs of small and medium-sized businesses. Square Appointments emphasizes ease of use, allowing barbershops to manage bookings with minimal setup. The platform includes automated reminders, flexible scheduling options, and seamless integrations, making it a practical choice for barbershops aiming to optimize appointment management and improve customer satisfaction.

Supported Processes: Square Appointments offers integrated scheduling, point-of-sale (POS) transactions, and customer relationship management (CRM). It facilitates online booking, automated reminders, and payment processing.

Target Market: Designed for small to medium-sized businesses in the beauty and wellness industry, including barbershops, salons, and spas.

Typical Adopters: Independent professionals and small business owners seeking a user-friendly, all-in-one solution for appointment scheduling and payment processing.

Square Appointments TCO is \$9,865,45 CAD which meets the budget (Refer to Appendix D for the figure breakdown). It satisfies the primary mandatory requirements for scheduling, payment processing, and inventory management. The platform allows barbers to update their availability, captures customer details during booking, and provides booking confirmations to both the client and barber, effectively covering essential functional needs. Square's integrated payment processing enables advance payments and supports various payment options, including cash transactions and detailed commission tracking. Additionally, Square offers built-in inventory management solutions, allowing barbershops to monitor stock levels and manage inventory efficiently. The platform is scalable, supporting multiple locations and accommodating unique schedules for individual employees, making it suitable for growing barbershops.

Vendor 2: Squire

Squire was founded in 2015 by founders LaRon and Dave Salvant. Neither LaRon, a 37-year-old corporate lawyer, nor Salvant, who is 36 and worked in finance, had worked in a barbershop before—or run a small business of any sort. With their lack of experience in the barbershop industry, the founders took a gamble and leased a failing barbershop business in Chelsea, New York. This allowed them to understand the business needs of the barbers and served them as a sandbox to make errors. LaRon and

Salvant realized they had to rework Squire from a glorified appointment app to something that could handle all the nitty-gritty headaches of running a very particular type of small business.

Today, the New York-based startup's booking software is currently used by more than 3000 barber shops in the United States, Canada and the U.K. Squire is a backend platform that provides software for Customer Relationship Management (CRM), booking management, analytics, and point of sales (POS) systems. The subscription based SaaS (which shops typically rebrand with their own logo) offers not only basic booking and payment services, but it can help divvy up the receipts among a shop's many barbers. It can automatically manage the payouts of tips, as well as handle payments for chair rentals. It lets businesses retain customers, manage operations, increase revenue, launch memberships, and manage appointments and services all in the one place.

Supported Processes: Squire provides comprehensive barbershop management tools, including appointment booking, POS, customer management, and business analytics. It also offers features like loyalty programs and marketing integrations.

Target Market: Tailored specifically for barbershops and men's grooming businesses aiming to streamline operations and enhance customer engagement.

Typical Adopters: Barbershop owners and managers looking for industry-specific software to optimize scheduling, payments, and client retention strategies.

Squire TCO is \$6,434.43 CAD which meets the budgets (Refer to Appendix E for the figure breakdown). Overall, this vendor thus far meets all of the mandatory requirements of Number One Barbershop including an uptime of 99.97% YTD and fits with business needs as they specialize in the barbershop small business sector. The vendor also offers training on the system and data migration from the current system at no additional cost.

Vendor 3: Fresha

Fresha, founded in 2015 and based in London, UK, is a leading provider of cloud-based software tailored to the beauty and wellness industry, including salons, spas, and barbershops. With over eight years of experience, Fresha offers an all-in-one platform for managing appointments, payments, customer relationships, and marketing. Its user-friendly features include scheduling, point-of-sale (POS) tools, inventory tracking, and automated promotions. The company also provides integrated payment processing and commission tracking, enabling secure transactions and simplifying payroll by calculating commissions for staff. Available in more than 120 countries, Fresha has a strong presence in North America, Europe, and Australia. The main services are free, but there are transaction fees and access to paid premium features.

Supported Processes: Fresha offers appointment scheduling, POS, client management, and marketing tools. It provides a subscription-free model with usage-based pricing, making it accessible to a wide range of businesses.

Target Market: Beauty and wellness businesses, including barbershops, salons, and spas, looking for cost-effective management solutions.

Typical Adopters: Small to medium-sized business owners and independent professionals seeking a budget-friendly platform with essential features for managing appointments and client relationships.

Fresha's TCO is \$10,166.88 CAD which meets the budget (Refer to Appendix F for the figure breakdown). It also fulfills all requirements across booking, inventory, payment, and general functions. It supports unlimited bookings with real-time updates to prevent double bookings, and it provides automated notifications. Client data is securely stored, while the inventory system actively tracks stock, sends reorder alerts, and generates reports. The "Team Pay" feature streamlines payroll by automating commission and tip calculations, with flexible payment options available. Fresha is accessible in English and French across devices, ensuring data privacy compliance.

Vendor 4: Phorest

Phorest, founded in 2003 and headquartered in Dublin, Ireland, is a specialized provider of management solutions for salons and barbershops. With over 20 years of experience, Phorest is led by CEO Ronan Perceval and is dedicated to helping salon and spa owners build thriving, client-centered businesses. The company's mission emphasizes growth, client satisfaction, and operational efficiency, serving over 11,000 businesses and 155,000 professionals worldwide. Phorest's comprehensive platform includes tools for client management, marketing, and educational support, all tailored to the unique needs of salons, barbershops, and spas. The Total Cost of Ownership (TCO) for Phorest's solution, totaling CAD 6,932, encompasses a monthly subscription fee of CAD 129, a one-time enrollment fee of CAD 250, and a 1.65% transaction fee per sale.

Supported Processes: Phorest delivers salon management solutions encompassing appointment scheduling, inventory management, CRM, marketing automation, and reporting. It emphasizes client retention and growth through targeted marketing tools.

Target Market: Salons and spas of various sizes seeking to boost client engagement and streamline daily operations.

Typical Adopters: Salon owners and managers focused on enhancing customer loyalty and leveraging marketing tools to drive business growth.

Phorest's TCO is \$6,932.30 CAD, which meets the budget requirement (Refer to Appendix G for the figure breakdown). It also fulfills all mandatory requirements with its robust functionality across booking, inventory, payment, and general system needs. It supports unlimited bookings with real-time updates to prevent double bookings and provides automated notifications for confirmations and reminders. Client data is securely stored and encrypted, ensuring compliance with privacy regulations. The inventory system actively tracks stock levels, sends reorder alerts, and generates detailed reports for stock

management. Phorest simplifies payroll with automated commission tracking and supports multiple payment methods, including cash and digital options. Accessible on desktop and mobile devices, Phorest ensures flexibility and scalability, making it a reliable solution for current operations and future growth.

Important Note:

Phorest does not publicly provide a specific uptime percentage. However, after further contact, the vendor has emphasized that the software is consistently operational and designed to remain functional at all times.

Vendor 5: Vagaro

Founded in 2009 and based in Dublin, California, Vagaro has earned a strong reputation in the beauty and wellness industry as a reliable software provider. Known for its user-friendly and affordable platform, Vagaro supports thousands of small to medium-sized businesses worldwide, including salons, barbershops, and spas. Vagaro is a cloud-based, all-in-one management tool tailored for salons, spas, and fitness centers. It offers everything a barbershop needs to run smoothly, including POS, appointment scheduling, client management, inventory tracking, and marketing. The company prioritizes customer support and continuously updates its software based on user feedback, ensuring that it stays relevant and meets the changing needs of its clients. Vagaro's focus on innovation and ease of use has made it a trusted choice for businesses looking to streamline their operations.

Supported Processes: Vagaro delivers a robust suite of tools for booking, POS, inventory management, marketing, and reporting. It supports online booking, membership management, and offers a marketplace for client discovery.

Target Market: Salons, spas, fitness centers, and wellness businesses aiming for comprehensive management solutions.

Typical Adopters: Business owners and managers seeking an all-encompassing platform to handle various aspects of operations, from scheduling to marketing and client management.

Vagaro is a great fit for small to medium-sized salons, spas, and barbershops that want to simplify their operations without breaking the bank. It's popular with independent barbershops and salons that need one easy place to handle bookings, payments, and customer info. Its flexible setup lets businesses start with the basics and add more features as they grow, making it ideal for owners who don't have an IT team but need reliable, user-friendly software.

Vagaro TCO is \$9,019.43 CAD which meets the budget requirement (Refer to Appendix H for the figure breakdown). The solution is well-suited for Number One Barber Shop, meeting all mandatory requirements across booking, inventory, payments, and client management (*Vagaro Features – Vagaro Support*, 2024).

PART III

1. Desirable Criteria

Desirable Criteria & Weight	Description	Justification	Weight Justification
Total Cost of Ownership - 25%	The TCO over 5 years should fit the budget of the client.	Managing TCO ensures the solution remains financially sustainable for the barbershop, balancing affordability with functionality to maximize ROI and support growth.	TCO significantly impacts financial viability and long-term decision-making, making it a top priority in selecting a system.
Commission Split - 10%	The system must support customizable commission splits for barbers, allowing unique configurations based on individual agreements and performance metrics.	The team has many barbers with different experience levels and different commission splits. The specification of the percentage is important to automate the tedious task of calculating each individual commission.	While this criteria is impactful for staff satisfaction, it's secondary to core functions like booking and scheduling, warranting a moderate priority.
No-Show Fee - 7.5%	The system must allow flexible configuration of no-show fee policies, enabling the admin to set payment structures (e.g., charge at booking, at service, or no upfront payment) and apply no-show protection fees as needed.	No-show fees protect barbers' time and revenue, discouraging missed appointments while offering flexibility for customer-friendly policies. It also ensures reduced revenue loss and supports better scheduling management by holding clients accountable.	Important for financial protection and efficient operations as they experience a good amount of missed appointments.
Data Migration - 7.5%	The system must support seamless migration of client information and booking history from the existing system to the new one, ensuring data accuracy and completion within one week.	Smooth data migration minimizes operational disruption, preserves critical historical records, and ensures continuity in customer service.	Although a one-time task, it is critical due to the large, historic database involved, making it moderately important for the system's successful implementation.

Recurring Appointment Scheduling - 5%	The system must allow clients to book recurring appointments, enabling them to reserve their preferred time slots on a weekly, bi-weekly, or monthly basis.	Recurring appointments cater to loyal clients who prefer regular visits, enhancing customer convenience and promoting long-term retention. This feature simplifies booking for repeat customers, improves scheduling efficiency, and fosters customer loyalty.	Recurring appointment scheduling is a useful feature for enhancing client convenience and retention. However, its impact is limited to a specific subset of customers who prefer regular bookings, which is why it is assigned a moderate weight
Seasonal Demand Forecasting - 5%	The system must analyze historical data to forecast service demand during peak seasons, such as holidays, enabling the barbershop to optimize scheduling and resource allocation.	Anticipating seasonal demand helps the barbershop avoid overbooking or underutilization, ensuring efficient operations and maximizing revenue during high-demand periods.	While beneficial for operational efficiency, its impact is periodic, aligning its weight with its role in optimizing peak season management.
Inventory Shrinkage - 5%	The system must track inventory losses due to waste, damage, or expiration, allowing staff to log product loss and providing insights to reduce waste and improve inventory management.	Tracking shrinkage ensures accurate inventory levels, reduces waste-related costs, and helps identify patterns for operational improvements.	It addresses a specific operational need, providing valuable insights to reduce waste and improve stock management, warranting a moderate weight.
System Deployment - 5%	The vendor must deploy and configure the system within two weeks, ensuring seamless integration with minimal disruption to the barbershop's ongoing operations.	A timely and smooth deployment minimizes downtime, maintains business continuity, and ensures staff can quickly adapt to the new system. Efficient deployment reduces operational risks and ensures the barbershop can transition to the new system without affecting customer service.	While critical to the system's initial success, deployment is a one-time process, justifying a moderate weight that reflects its importance without overstating its ongoing impact.
Around the Clock Support - 5%	The vendor must provide support aligned with the barbershop's operating hours, ensuring assistance	Timely support during business hours reduces the risk of operational disruptions and enhances	Ensures essential operational support without being a direct driver of business

	is available every day of the week.	system reliability, critical for maintaining customer trust.	outcomes, making it a moderately important feature.
Medium of Support - 5%	The system must offer phone support, chat support, and a ticketing system, with chat and ticketing available on both the web and app platforms, to address client issues effectively based on urgency.	Providing multiple support channels ensures all client concerns, whether urgent or non-urgent, are addressed promptly, improving customer satisfaction and operational efficiency.	A variety of support channels is valuable for enhancing user experience and issue resolution but is not a core operational function, justifying its moderate priority.
Future Expansion - 5%	The system must be scalable to support the addition of new locations, staff, and services with minimal adjustments, ensuring smooth growth without major overhauls or system upgrades.	Scalability allows the barbershop to grow efficiently, reducing costs and complexities associated with adapting or replacing the system as the business expands.	While expansion capability is critical for future growth, it is not an immediate operational need, making it moderately important.
Ease of Access - 5%	The system must provide an intuitive, user-friendly interface for staff and customers, ensuring seamless navigation and usability across both mobile and desktop devices.	A simple and accessible interface enhances user experience, reduces training time for staff, and encourages customer engagement with the system.	While critical for adoption and usability, it is a general requirement for any modern system, assigning it a moderate level of importance.
Support Documentation - 5%	The system must include a comprehensive support library with detailed guides and use cases specific to barbers, enabling self-service learning and effective use of the platform.	A robust support library reduces reliance on direct support, saves time, and empowers staff to resolve common issues independently.	While essential for user empowerment, it complements other support features, justifying its moderate level of importance.
Onboarding & Training from the vendor - 5%	The vendor must provide structured onboarding and training sessions, supplemented with resources, to help users understand system features and adopt best practices for efficient operations.	Proper onboarding ensures users quickly adapt to the system, minimizing downtime and operational disruptions while maximizing system utilization.	Onboarding is crucial for initial adoption but is a one-time process, making it moderately important in the overall system evaluation.

2. Scoring Scheme

This scoring scheme assesses software solutions on a thorough 0–1 scale with 0.2 increments, allowing for certain and objective comparison across major parameters. Each increment indicates distinct degrees of functionality, performance, and support, ensuring clarity in evaluation. The framework enables informed decision-making by finding systems that best fit operational goals and priorities.

Functionality and fit:

- **Recurring Appointment Scheduling:**
 - **1:** *Comprehensive support for recurring appointments with advanced features like reminders and cancellations.*
 - **0.8:** *Fully functional recurring scheduling; supports multiple intervals, reminders, and is user-friendly.*
 - **0.6:** *Moderately functional; recurring appointments can be set up with some flexibility, but lacks advanced options.*
 - **0.4:** *Basic recurring appointment functionality is available but limited (e.g., fixed intervals with no customization).*
 - **0.2:** *Minimal support for recurring appointments; requires manual intervention for setup or lacks user-friendly design.*
 - **0:** *The system does not support recurring appointment scheduling at all.*
- **Seasonal Demand Forecasting:**
 - **1:** *Comprehensive seasonal demand forecasting with high accuracy, offering detailed insights and customizable forecasting models for various seasonal patterns.*
 - **0.8:** *Accurate seasonal forecasting with limited customization; sufficient for most seasonal adjustments but with minor constraints.*
 - **0.6:** *Basic seasonal forecasting tools that capture general trends but lack customization for specific patterns.*
 - **0.4:** *Limited forecasting capabilities; basic predictions available but lacking seasonal adjustments.*
 - **0.2:** *Minimal forecasting functionality with no dedicated tools for seasonal demand.*
 - **0:** *No demand forecasting tools; lacks ability to predict seasonal trends.*
- **Inventory Shrinkage:**
 - **1:** *Detailed waste, loss, and shrinkage tracking with analytics to pinpoint root causes, providing actionable insights to minimize waste effectively.*
 - **0.8:** *Effective tracking with basic analytics to monitor waste and loss, though lacking advanced root-cause analysis features.*

- **0.6:** Basic tracking tools available, capturing waste and loss data but with limited analytical insights.
- **0.4:** Limited tracking, with manual entry or basic logging; minimal support for analysis or actionable insights.
- **0.2:** Minimal tracking features with little to no data on waste, loss, or shrinkage.
- **0:** No waste, loss, or shrinkage tracking functionality.

Quick Implementation:

● **System Deployment**

- **1:** System is fully operational within one week, with no workflow interruptions.
- **0.8:** System is operational within two weeks, with minor, manageable workflow disruptions.
- **0.6:** System is operational within three weeks, with some moderate disruptions to workflows.
- **0.4:** System is operational within four weeks, with noticeable workflow interruptions.
- **0.2:** System takes longer than five weeks, with significant workflow interruptions.
- **0:** No clear timeline for deployment; major disruptions expected.

● **Data Migration**

- **1:** Data migration, including cleaning and transfer, is completed within one week.
- **0.8:** Data migration is completed within 1.5 weeks.
- **0.6:** Data migration is completed within two weeks.
- **0.4:** Data migration is completed within three weeks.
- **0.2:** Data migration exceeds three weeks with significant issues.
- **0:** No reliable data migration solution.

TCO Total Cost of Ownership

● **TCO over 5 years**

- **1:** Cheapest Solution
- **0.8:** Second Cheapest Solution
- **0.6:** Third Cheapest Solution
- **0.4:** Fourth Cheapest Solution
- **0.2:** Fifth Cheapest Solution
- **0:** All other Solutions

Customization:

● **Commission Split:**

- **1:** Fully customizable commission splits for each barber; allowing unique configurations without limitations.
 - **0.8:** Customizable commission splits for each barber, but with some constraints on complexity or structure.
 - **0.6:** Basic customization of commission splits is available, but limited to a standard set of options.
 - **0.4:** Limited customization options, with only basic commission adjustments possible.
 - **0.2:** Minimal customization; commission splits are mostly fixed with few adjustable options.
 - **0:** No option for customizing commission splits.
- **No-Show Fee:**
 - **1:** Fully customizable payment structure with all options: charge at booking, charge at date of service, optional payment information, and no-show protection.
 - **0.8:** Supports most configurations, including no-show protection, but with some limitations (e.g., limited flexibility in when payments are charged).
 - **0.6:** Basic configuration options available, with two out of the four required options (e.g., charge at booking and date of service but lacks no-show protection).
 - **0.4:** Limited customization with only one configurable payment structure and no option for no-show protection.
 - **0.2:** Minimal flexibility; only a fixed payment structure with no-show protection not available.
 - **0:** No configuration options; fixed payment structure without any no-show fee capability.

Vendor Support

- **Around the Clock Support**
 - **1:** Full support availability covering all specified operating hours, seven days a week, in the client's time zone.
 - **0.8:** Support is available for most hours, with minor gaps (e.g., limited weekend coverage) that do not critically affect operations.
 - **0.6:** Support is available during weekdays with significant gaps in weekend or late-hour coverage.
 - **0.4:** Limited support coverage, missing several hours each day and with minimal weekend availability.
 - **0.2:** Minimal support availability, covering only standard business hours (e.g., 9 am - 5 pm, Monday to Friday) in a different time zone.
 - **0:** No support available during client's operating hours; major misalignment with client's time zone.
- **Medium of Support**

- **1:** Provides phone support, chat support, and a ticket system, with full access to chat and ticketing on both web and app versions.
- **0.8:** Provides all three support channels, but chat or ticket access is limited on either the web or app version.
- **0.6:** Offers two of the three support channels (e.g., chat and ticketing) with access available on both platforms.
- **0.4:** Limited support, offering only one or two channels, with access gaps on either the web or app.
- **0.2:** Minimal support, offering only a ticketing system with limited platform access.
- **0:** No support options available through phone, chat, or ticketing.

Scalable

- **Future Expansion:**

- **1:** Fully scalable; easily accommodates new locations, staff, and services with no major adjustments or upgrades needed.
- **0.8:** Supports most expansion needs (e.g., additional staff and services) with minimal adjustments but may require minor upgrades for multiple new locations.
- **0.6:** Supports limited expansion (e.g., staff increase only) with some moderate adjustments needed for adding locations or services.
- **0.4:** Expands with significant limitations, requiring noticeable adjustments or partial reconfiguration for new additions.
- **0.2:** Minimal scalability, requiring major system changes for any significant expansion.
- **0:** No scalability; any expansion would require a complete system overhaul.

User Friendly System

- **Ease of Access**

- **1:** Highly accessible, with an intuitive, well-optimized interface on both mobile and desktop, suitable for all user types (staff and customers).
- **0.8:** Accessible and intuitive interface on both mobile and desktop, with minor usability issues affecting a small subset of features.
- **0.6:** Usable interface on both platforms, though with some moderate usability challenges for certain user groups (e.g., staff-only features less intuitive).
- **0.4:** Accessible on mobile and desktop, but with notable usability issues that impact user experience for either staff or customers.
- **0.2:** Limited accessibility; basic functionality available, but significant usability issues on either mobile or desktop.
- **0:** No accessible interface on mobile or desktop; difficult for users to navigate.

- **Support Documentation**

- **1:** Extensive support library with comprehensive, well-organized use cases covering all essential barber functions and scenarios.
- **0.8:** Well-developed support library with most key use cases, though missing a few specialized scenarios.
- **0.6:** Basic support library with general use cases, but lacking depth in specific scenarios relevant to barbers.
- **0.4:** Limited support library with minimal use cases; key scenarios are missing or inadequately covered.
- **0.2:** Minimal support resources; only a few general guides with limited relevance to barber-specific needs.
- **0:** No support library or use case resources available.

- **Onboarding & Training from the vendor**

- **1:** Comprehensive onboarding and training program, including live sessions, interactive tutorials, and extensive resources for all user levels.
- **0.8:** Thorough onboarding and training with live sessions and basic resources, but limited interactivity or advanced materials.
- **0.6:** Basic onboarding and training program with standard resources, primarily self-guided materials with minimal live support.
- **0.4:** Limited training; onboarding covers only essential functions with few resources or minimal support options.
- **0.2:** Minimal onboarding; very basic guidance or documentation, with no formal training sessions.
- **0:** No onboarding or training provided by the vendor.

3. Decision Grid

A decision grid is a structured tool designed to simplify decision-making by organizing and comparing different options based on specific and measurable criteria. The grid helps ensure that decisions are made logically, transparently, and with a clear understanding of how each option aligns with the priorities of Number One Barbershop.

In the decision grid, the row represents the desirable criteria like *Functionality & Fit* and *Quick Implementation*. In this instance, the different five vendors were assessed. The columns outline each vendor and the matrix intersection represents the evaluation of the different options. These criterias were based on specific goals of the company. Each option was scored against each criterion on a standardized scale, where higher score indicated a stronger performance from the vendor. Weights were assigned to

ensure that critical factors had a greater importance on the outcome. The total scores for each criterion were multiplied by their respective weights and then summed to conclude the total score for each option.

We assigned values to each vendor using a predefined scoring scheme from the previous section, ensuring that every score was based on verifiable data. Each team member independently evaluated the vendors and assigned scores based on the information provided. These individual scores were then reviewed collectively by the team to ensure accuracy, consistency, and alignment with the scoring scheme. This process ensured a transparent evaluation. A detailed matrix with the score assigned is included in the appendix I.

4. Vendor Assessment

Vendor 1: Square

The scoring for Square in the evaluation matrix reflects its alignment with the required and desirable criteria. In the desirable criteria, Square performs well in "Functionality & Fit" with features like recurring appointment scheduling (score: 1), though it lacks seasonal demand forecasting (score: 0). Inventory shrinkage received a moderate score (0.6), indicating some limitations in managing advanced inventory concerns. Square demonstrates strong implementation capabilities, scoring perfectly in system deployment and data migration (both scored 1). Total cost of ownership (TCO) was rated lower (0.2), suggesting higher long-term costs despite competitive acquisition pricing.

Square excels in customization options, with perfect scores for features like commission splits and no-show fees (both scored 1), showcasing flexibility tailored to service businesses. Vendor support received a solid score (0.8), indicating dependable assistance but not necessarily the most extensive support offerings. Scalability (0.8) highlights good growth potential, though large-scale operations may require additional considerations. Ease of use is a strong point, with ease of access rated perfectly (1); however, support documentation and onboarding/training scored moderately (0.6), pointing to areas for improvement in user enablement. Overall, Square achieved a weighted score of 0.66, reflecting a well-rounded feature set with some opportunities for enhancement.

Vendor 2: Squire

The Squire solution was evaluated against the desirable criteria with the following results: In Functionality & Fit, Squire scored 1.0 as it allows customers to book recurring appointments, either individually or in groups, at their desired frequency. However, it lacks forecasting capabilities, resulting in a score of 0 for Seasonal Demand Forecasting. In Inventory Shrinkage, Squire scored 0.8 due to its ability to track actual inventory levels, review discrepancies, and calculate shrinkage percentages. For Quick Implementation, Squire received a perfect score of 1.0 for System Deployment and Data Migration, as the vendor handles all aspects of setup, staff training, and data migration, including customer history from the previous system. Squire is also the most cost-effective option over a five-year total cost of ownership (TCO), earning another perfect score of 1.0. It achieved top marks in Customization, Vendor Support, and Scalability, meeting critical requirements such as customized commission percentages for each barber and no-show protection during bookings, as well as satisfying all outlined support metrics. Lastly, Squire scored 0.8 in Support Documentation and Onboarding & Training due to its extensive support library but

limited interactivity and static training materials. Overall, Squire achieved a total score of 0.92, making it the highest-scoring solution among the evaluated options.

Vendor 3: Phorest

The scoring for Phorest is in alignment with the desirable criteria. In Functionality and fit, Phorest scored a (1), as the software supports recurring appointment scheduling, reminders and modifications. For seasonal demand, Phorest scored a (0.2), as it offers minimal forecasting features. Inventory shrinkage scored a (0.8), as the software offers tracking and basic analytics, but does not provide an advanced root-cause analysis. In terms of implementation, Phorest achieved (1) for system deployment and data migration (1), as the solution offers a seamless setup process. Phorest meets budget requirements, scoring a (1) in acquisition cost. In total cost of ownership (TCO) over five years, it scored a (0.8) as it was the second cheapest option. Customization options for commission splits and no-show fees both scored a 1 fully meeting the requirements. Vendor support also received a (1) as the platform offers around-the-clock availability and multiple support channels. Scalability, ease of access, and onboarding/training also scored a (1), indicating ease of adaptability, user experience, and training programs. Phorest's support documentation scored a (0.8), as it is well-developed and covers most key use cases but lacks detailed guides for certain advanced functionalities or uncommon use cases.

Vendor 4: Fresha

The evaluation of Fresha reveals a robust alignment with key criteria, showcasing both strengths and areas for improvement. In Functionality & Fit, the system scored highly (1) for Recurring Appointment Scheduling, demonstrating comprehensive support with advanced features. However, it lacks Seasonal Demand Forecasting (0), which might be a drawback for businesses managing fluctuating demand. The system scored moderately (0.6) for Inventory Shrinkage, indicating basic tracking tools with limited analytical insights. The software performed excellently in Implementation, achieving perfect scores (1) in both System Deployment and Data Migration, ensuring a seamless transition without significant disruptions. Acquisition Cost, however, received a lower score (0.4), reflecting a higher upfront investment, while its TCO (Total Cost of Ownership) scored moderately (0.6), suggesting room for cost optimization in the long run. In terms of Customization, the system excels in Commission Splits (1) with fully customizable configurations, while its No-Show Fee capabilities scored poorly (0.2), indicating limited flexibility in this area. Vendor Support scored moderately across categories, achieving 0.4 for Support Availability and 0.8 for the Medium of Support, demonstrating partial alignment with business needs. The system's scalability and user-friendliness were rated positively. Future Expansion scored (1), confirming full scalability, while Ease of Access and Support Documentation scored (0.8) and (1), respectively, showcasing strong accessibility and comprehensive resources. However, Onboarding & Training scored moderately (0.6), indicating that additional vendor support in this area could enhance user adoption. Overall, Fresha achieved a balanced evaluation, with notable strengths in implementation and scalability, offset by moderate performance in cost and certain customization features.

Vendor 5: Vagaro

The Vagaro solution was evaluated against the desirable criteria with the following results: In Functionality & Fit, Vagaro scored 0.8 for Recurring Appointment Scheduling due to its robust scheduling capabilities, which allow clients to book recurring appointments with customizable intervals

and automated reminders. However, it lacks Seasonal Demand Forecasting capabilities, resulting in a score of 0 in this category. For Inventory Shrinkage, it achieved a score of 0.8, providing detailed inventory tracking and shrinkage monitoring, which supports effective stock management and helps reduce waste. Under Quick Implementation, Vagaro received top marks for System Deployment, scoring 1.0 due to its streamlined onboarding and efficient implementation. For Data Migration, it scored 0.8, as its migration tools are reliable but occasionally require manual intervention, unlike fully automated approaches. In terms of TCO, Vagaro scored 0.6 due to slightly higher overall costs over five years compared to Other Options. In Customization, Vagaro excelled, scoring 1.0 for both Commission Split and No-Show Fee, demonstrating its ability to tailor these critical functions to the barbershop's needs. In the Vendor Support category, Vagaro scored 1.0 for Scalability and 0.8 for Medium of Support, as it offers comprehensive support options with minor limitations in certain time zones. For Ease of Use, Vagaro received full marks 1.0 for Ease of Access, reflecting its intuitive interface on both mobile and desktop platforms. It also scored 0.8 for Support Documentation, offering a robust library of resources but lacking interactivity. In Onboarding & Training, Vagaro scored 0.8 due to its detailed training materials and initial live training sessions, which have limited interactivity and advanced materials. Overall, Vagaro achieved a total score of 0.81, reflecting its strong alignment with the barbershop's needs, particularly in customization and scalability, while remaining slightly behind others in areas like seasonal demand forecasting and TCO. Despite these minor gaps, Vagaro remains a viable option for Number One Barbershop due to its robust feature set and user-friendly design.

5. Chosen Vendor

To address the operational needs of Number One Barber Shop, several SaaS vendors were evaluated, including Square, Squire, Phorest, Fresha, and Vagaro. **Squire** scored the highest based on desirable criteria, making it the best fit for the business needs of Number One Barber Shop.

Overall Score

Squire achieved the highest total score (0.92) among evaluated SaaS vendors. This superior score reflects its exceptional performance across all desirable criteria, making it the most balanced and reliable choice for the barbershop.

Functionality and Fit

Squire excelled with a perfect score (1.0) in Recurring Appointment Scheduling, a critical feature for streamlining operations and enhancing customer retention. Additionally, Squire scored 0.8 in Inventory Shrinkage due to its ability to track inventory levels, review discrepancies, and calculate shrinkage percentages. While it lacks Seasonal Demand Forecasting, resulting in a score of 0 in that category, its other functionalities compensate for this gap.

Quick Implementation

Squire received a perfect score (1.0) in System Deployment and Data Migration, as it handles all aspects of setup, including staff training and data migration, ensuring a seamless transition from the previous

system. The vendor's ability to manage customer history and staff onboarding simplifies the implementation process, saving time and effort.

Cost-Effectiveness

Over a five-year period, Squire is the most cost-effective solution, earning a perfect score of 1.0 in Total Cost of Ownership (TCO). This makes it a highly economical option for Number One Barber Shop, especially compared to other SaaS solutions that may involve higher long-term costs or additional fees.

Vendor Support and Training

Squire scored high (0.80) in Vendor Support by meeting all outlined support metrics, including 24/7 assistance and ongoing technical support. While its Support Documentation and Training scored 0.8 due to less interactive and more static training materials, the vendor compensates with extensive resources and a robust onboarding process.

Scalability

Squire is designed to support business growth, allowing the seamless addition of new barbers, services, and even locations. Its score of 0.8–1.0 in Scalability confirms its ability to accommodate future expansion plans effectively.

Competitive Advantages

While all vendors met the mandatory requirements, Squire outperformed competitors in critical areas like Data Migration and System Deployment, achieving perfect scores in both categories. These features reinforce its readiness for immediate implementation and its ability to streamline operations quickly.

Final Recommendation

Based on a detailed evaluation of alternatives, SaaS is the most suitable IT solution for Number One Barber Shop due to its cost-efficiency, quick implementation, and scalability. Among the SaaS options, Squire is the clear choice due to its industry specialization, superior functionality, and top-tier vendor support. Its outstanding total score of 0.92 confirms its alignment with the business's needs and goals for growth and operational excellence.

6. Squire Clauses

6.1. Clauses

- Subscription Fees and Payment Terms (Section IV)
 - **Clause:** subscription fees are non-cancellable and non-refundable, and failure to pay on time could lead to suspension or termination of the account
 - **Implication:** If Number One Barbershop wants to discontinue their service, they will be liable for fees for the entire subscription term.
- Changes to Fees and Services (Section IV (b))
 - **Clause:** Squire may increase fees or discontinue services during renewal terms
 - **Implications:** future cost increases could make the service less affordable, and discontinuation of key services could disrupt operations

- Data Sharing with Third-Party Providers (Section III)
 - **Clause:** Squire has the right to share enterprise customer data with third-party providers.
 - **Implications:** This raises privacy concerns, specifically sensitive client or business data that third parties can mishandle
- Indemnification (Section XII)
 - **Clause:** The client must indemnify Squire for claims arising from their use of the platform, including data breaches or disputes with their own clients.
 - **Implications:** The business could face significant legal and financial liability if a dispute arises, even if not directly their fault.
- Limited Warranty and Liability (Section XI)
 - **Clause:** Squire disclaims responsibility for service interruptions or issues caused by third parties and limits its liability to \$100 or the subscription fees paid in the last 12 months.
 - **Implications:** The business may have no recourse for operational disruptions or financial losses caused by the platform.
- Changes to Agreement Terms (Introduction and Section XVI)
 - **Clause:** Squire can unilaterally update the terms of the agreement, and continues use signifies acceptance
 - **Implications:** the business may face unfavorable changes without an option to negotiate

6.2. Mitigation

To address the concerns highlighted in the agreement, **Number One Barbershop** can adopt the following mitigating strategies:

- **Negotiate Flexible Subscription Terms:** Engage Squire to modify the clause on non-cancellable and non-refundable fees. Request the inclusion of prorated cancellation options for unused services or shorter subscription commitments to reduce financial liability in case of discontinuation.
- **Cap or Lock Fee Increases:** Request a cap on fee increases during renewal terms or negotiate for fixed rates over a specific period. Additionally, include a clause that mandates prior notice and discussions before any fee hikes or service discontinuation to mitigate operational disruptions.
- **Strengthen Data Privacy Agreements:** Advocate for a data-sharing policy that limits the scope of third-party data access and explicitly specifies the security measures third parties must uphold. Include provisions that hold Squire accountable for breaches resulting from third-party misuse.
- **Mitigate Indemnification Risks:** Propose amendments to the indemnification clause that limit liability to disputes directly caused by Squire's platform. Request shared accountability for data breaches to balance responsibility and reduce undue legal risks.
- **Expand Liability Protections:** Negotiate an increase in the liability cap beyond \$100 or the subscription fees paid. Request explicit guarantees for critical service performance, including compensation clauses for operational disruptions caused by third parties.
- **Monitor Changes to Agreement Terms:** Incorporate a requirement for mutual consent for significant changes to terms or establish a minimum notice period for updates, allowing the business to assess impacts and negotiate before continued use.

By adopting these strategies, Number One Barbershop can reduce exposure to financial, operational, and legal risks while safeguarding its interests and data.

7. Privacy Plan

Number One Barber Shop Privacy Plan:

Protecting customer privacy is a cornerstone of implementing the Squire system at Number One Barber Shop. The privacy plan outlines how personal information is collected, stored, and protected to ensure transparency, compliance with regulations, and safeguarding of sensitive data. This plan prioritizes the confidentiality of customer information while promoting trust in the barbershop's operations.

The Squire system will handle customer data responsibly, adhering to legal frameworks such as the **Personal Information Protection and Electronic Documents Act (PIPEDA)** and, where applicable, the **General Data Protection Regulation (GDPR)**. The system will ensure data minimization, meaning only the information necessary for operations is collected and stored, reducing the risk of unauthorized access or misuse. Customers will be informed about the type of data collected and the purposes for which it is used. This transparency builds trust while complying with regulatory requirements.

A key aspect of this plan is **data ownership**. Customers retain ownership of their data, and it will only be used with explicit consent for the purposes stated, such as scheduling appointments, processing payments, and personalizing services. Customers will have the right to access, update, or delete their information from the system upon request. This ensures compliance with **data subject rights** and fosters confidence in the system. (*Privacy Policy, 2024*)

Furthermore, Squire's built-in **privacy-by-design principles** ensure that data security and privacy are embedded into the system's core architecture. These principles will prevent unauthorized access to sensitive customer information and minimize the likelihood of data breaches. (*Privacy Policy, 2024*)

Personal Information Collected and Stored

Information Stored by Squire (*Privacy Policy, 2024*)

Category	Type	Collection Method	Safeguards

Profile Information	First and last name, email address, phone number, profile picture, account credentials.	Collected directly from users when creating or managing accounts, or when interacting with Barber Shops customers through Squire's platform.	Logical: Encrypted using AES-256 during storage and SSL/TLS during transmission; RBAC ensures authorized access only. Physical: Stored in secure AWS data centers with 24/7 surveillance and restricted access.
Location Information	Geolocation, IP address, Wi-Fi MAC address.	Automatically collected through mobile devices, browsers, and internet connections when accessing Squire Services.	Logical: Encrypted transmission using TLS; anonymized data for user privacy compliance. Physical: Stored in geographically redundant servers.
Contact Information	Names and contact information stored in mobile devices.	Synced from the user's mobile device with their permission, or directly entered by users or Enterprise Customers.	Logical: Access controlled via MFA and RBAC; data encrypted at rest and during sync processes. Physical: Secure device storage protocols.
Payment Information	Credit/debit card details, bank account information, billing/shipping addresses.	Collected during payment transactions through integrated third-party payment providers or directly entered by users.	Logical: PCI DSS-compliant tokenization; encrypted storage; fraud detection algorithms. Physical: Tamper-resistant payment terminals such as WisePad 3.
SMS and Email Data	Metadata and content of SMS or emails,	Collected through communication channels integrated into the Squire	Logical: Stored securely with encryption; access monitoring in place.

	including associated phone numbers.	Services, based on user interactions.	Physical: Data backed up in secure cloud storage facilities.
Internet Activity	Browsing history, search history, preferences, system activity (e.g., application crashes).	Collected automatically via cookies, web beacons, and analytics tools when using the Squire platform or interacting with related advertisements.	Logical: Data anonymized where applicable; firewalls and intrusion prevention systems (IDPS) secure data flow. Physical: Secured server environments with continuous monitoring.
Enterprise Information	Financial data (e.g., tax IDs, social security numbers, business banking details).	Provided by Enterprise Customers to establish and maintain accounts, or during account verification and compliance processes.	Logical: Strong access controls; data encrypted at rest and in transit. Physical: Safeguarded within certified and redundant AWS/Microsoft Azure facilities.

8. Deployment Plan

- **Site Preparation** – 1 day
 - **Tasks:** Set up any new hardware, such as tablets or computers, and ensure stable internet connectivity for smooth SaaS access.
 - **Goal:** Verify that the physical setup supports the new system requirements with a reliable internet connection.
- **Data Preparation and Migration** – 1 week (concurrent)
 - **Tasks:** Export data from Setmore, review customer data, schedules, and service records. Transfer data to Squire.
 - **Goal:** Ensure data accuracy and completeness to avoid errors in customer profiles, appointments, and service offerings.
- **System Setup and Configuration** – 2 days
 - **Tasks:** Configure the SaaS platform to align with the barbershop's needs. This includes setting up:
 - Service types and pricing
 - Staff profiles and permissions
 - Appointment scheduling settings
 - Payment processing options
 - **Goal:** Customize the system for the barbershop's specific services and staff roles, creating an intuitive environment for everyday operations.
- **Documentation and Support Setup** – 1 day
 - **Tasks:** Provide a user manual or quick reference guide to each staff member, outlining basic workflows and common troubleshooting steps. Confirm access to vendor support resources (e.g., chat, email support).
 - **Goal:** Ensure that staff have resources to address questions independently, reducing reliance on external support for minor issues.
- **Testing Phase** – 1 days pre:configuration
 - **Tasks:**
 - **Day 1:** Simulate typical customer interactions, such as booking appointments, processing payments, and updating customer profiles. Test appointment reminders, check-ins, and rescheduling workflows.
 - **Day 2:** Test edge cases, such as handling overlapping appointments, adding last-minute bookings, and managing no-shows. Simulate high-traffic scenarios to assess the system's responsiveness.
 - **Goals:**
 - Ensure that the system functions seamlessly for all routine tasks.
 - Identify and address any glitches or inconsistencies, particularly during high-traffic periods or special cases.
 - **Metrics for Successful Testing:**
 - 100% functionality of core features (booking, payment processing, customer management).
 - No delays or crashes under simulated high-traffic conditions.

- Smooth integration of notifications and alerts for customers and staff.
- **Staff Training** – 1 week
 - **Training Outline:**
 - The training program will cover both introductory and advanced topics within one week. Barbers will learn core functions such as booking appointments, checking in clients, viewing schedules, and managing customer profiles through hands-on practice with guided tutorials
 - Additionally, the program will include advanced training on payment processing, handling refunds or discounts, troubleshooting common issues, and utilizing customer communication features like sending reminders and updates, ensuring comprehensive skill development in a short timeframe.
 - **Training Format:**
 - In-person sessions or virtual demos provided by the vendor.
 - Hands-on practice with mock scenarios to build confidence.
 - Opportunity for staff to ask questions and troubleshoot common scenarios.
 - **Goal:** Ensure that all staff are comfortable with the system, confident in using it independently, and aware of where to find support if needed.
- **Go-Live Preparation** – 1 day
 - **Tasks:** Conduct final system checks to ensure readiness. Confirm that all data is accurately migrated, test key functions once more, and review any remaining questions with staff.
 - **Goal:** Verify that the system is fully operational and staff feel prepared for the transition.
 - This implementation will use the **Plunge** conversion method, meaning the barbershop will fully transition to the new SaaS system without running the old system in parallel. Therefore, all preparations must be complete, and staff must be fully trained before go-live to ensure a smooth transition
- **Go-Live** – 1 day
 - **Tasks:** Replace the embedded button on the Wix website linking to Setmore with one that redirects users to Squire's booking platform. Cancel the Setmore subscription to eliminate overlapping costs, and closely monitor the transition to ensure the new button functions properly while promptly addressing any user feedback or issues.
 - **Goal:** Achieve a smooth transition with minimal disruption to operations, ensuring that customers can book appointments and make payments as usual.
- **Post-Go-Live Support** – 1 week (vendor provided)
 - **Tasks:** Vendor offers on-call support to address any post-launch issues. Track issues and report back to the vendor for resolution.
 - **Goal:** Ensure smooth operations with vendor support during the initial adjustment period.
- **Ongoing Maintenance and Assessment** – Continuous
- **Key Performance Indicators (KPIs)** for monitoring performance and identifying maintenance needs:
 - **System Uptime:** Track uptime and responsiveness to ensure the system is reliable.
 - **Error Rate:** Monitor any recurring system errors or glitches and resolve them promptly.
 - **Staff and Customer Feedback:** Collect feedback on ease of use and satisfaction to assess the need for additional training or adjustments.

- **Transaction Success Rate:** Measure the success rate of completed transactions (e.g., payments) without errors.
- **Customer Retention and Appointment Fill Rate:** Track customer retention rates and appointment fill rates to evaluate the system's impact on business performance.

The Gantt chart included in Appendix J provides a visual timeline of the implementation process, outlining key tasks, their durations, and dependencies. It serves as a reference for tracking progress, ensuring that all stakeholders are aligned with the project schedule and milestones.

The RACI chart in Appendix K demonstrates an organized approach to deploying the new system at Number One Barbershop. The graphic indicates whose roles are responsible, accountable, consulted, or informed about each critical task. This facilitates easy communication, reduces confusion, and increases efficiency throughout the project, all of which contribute to the effective implementation of the new system.

Site Preparation:

- Owner (R, A): They ensure readiness of the physical space and take full accountability for system compatibility.
- Vendors (C): Provide guidance on hardware requirements and system compatibility.
- Consultants (C): Offer advice if needed on infrastructure or technology.
- Barbers (I): Informed about the system setup but not directly involved.

Data Preparation and Migration - Data Exportation:

- Owner (R, A): Responsible for initiating data export and ensuring data quality.
- Vendors (I): Kept in the loop about progress for seamless migration.
- Consultants (C): Offer advice on data handling and accuracy.

Data Preparation and Migration - Data Migration:

- Owner (I): Informed about migration progress and outcomes.
- Vendors (R, A): Fully responsible and accountable for the migration process.

System Setup and Configuration:

- Owner (R, A): Responsible for defining setup requirements and accountable for decisions.
- Vendors (C): Consulted for expertise in configuring the system.

Documentation and Support Setup:

- Owner (I): Informed of the documentation being created and its scope.
- Vendors (R, A): Fully responsible and accountable for creating and providing documentation.

Testing Phase:

- Owner (R, A): Drives the testing to ensure the system meets their expectations.
- Vendors (C): Consulted for troubleshooting and resolving issues.
- Barbers (I): Kept informed about testing progress and outcomes.

Staff Training:

- Owner (A): Accountable for ensuring all staff receive and complete training.
- Vendors (R): Responsible for conducting training sessions and providing materials.

Go-Live Preparation:

- Owner (R, A): Leads the final preparations and ensures readiness.
- Vendors (C): Consulted for last-minute adjustments and validation.

Go Live:

- Owner (R, A): Oversees the transition and takes accountability for a smooth rollout.
- Vendors (C): Consulted for immediate support and troubleshooting.
- Barbers (I): Informed about the switch to the new system.

Post Go-Live Support:

- Owner (A): Accountable for monitoring issues and feedback.
- Vendors (R): Responsible for providing support and resolving issues.

Ongoing Maintenance and Assessment:

- Owner (R, A): Continuously responsible for monitoring system performance.
- Vendors (C): Consulted for any needed maintenance or updates.

9. Change Management Plan

Objectives:

- Ensure a seamless migration from Setmore to Squire
- Minimize disruption to business operations during the transition
- Enhance staff proficiency in using Squire
- Improve customer satisfaction through enhanced booking and service management features

Stakeholder Analysis:

Key Stakeholders:

- Barbershop Owner: oversee the project and measure ROI
- Barbers/Staff: Direct users of Squire for appointments and customer data management

- Customers: End-users of the booking interface
- Squire Support Team: Provide technical expertise and guidance during implementation

Change Management Strategy:

Frameworks:

Kurt Lewin's Three Stages Model

- Unfreeze: communicate the need for change, highlight the benefits of Squire
- Change: Train staff and migrate data
- Refreeze: Establish new routines and reinforce usage

Change Management Curve:

- Address resistance by acknowledging concerns and providing frequent updates

Communication Plan:

Goals:

- Ensure all stakeholders are informed and aligned
- Mitigate problems and confusion

Approach:

- Announce the change early via team meetings ensuring that all members are aware of change
- Use clear, consistent messaging about the benefits of Squire (e.g: easier booking, improved client management)
- Create a FAQ document and share with staff
- Notify customers about changes through email, social media, and in-store signage (e.g: payment through app, no-show fees)

Training Plan:

Who:

- All staff members interacting with the software

What:

- Core features of Squire: appointment scheduling, customer management, reporting tools
- Handling technical issues and escalations processes

When & How:

- Initial Training: Hands-on sessions and video tutorials in the first two weeks of transition
- Follow-Up Training: Weekly refresher sessions post-launch for one month

Resources:

- Squire onboarding and support team
- In-house training champions (e.g: a tech-savvy staff member)

Risk Management:

Potential Risks:

- Data Migration Issues:
 - Backup all data from Setmore and validate migration accuracy
- User Resistance:
 - Mitigate through communication, training, and involvement in decision-making

- Customer Confusion:
 - Provide clear instructions and support for using the new system
- System Downtime:
 - Schedule implementation during non-peak hours and have a fallback plan

Success Metrics:

- Operational Efficiency: Reduction in booking errors and staff time spent on manual processes
- Staff Proficiency: Completion of training and adoption rate of new software
- Customer Satisfaction: Positive feedback through surveys and improved booking experience
- Business Performance: Increased bookings and reduced no-shows

Deployment Readiness Checklist:

- Data Migration: Ensure accurate transfer of customer data and bookings
- System Configuration: Verify SQUIRE settings align with barbershop operations
- Training: Complete all planned sessions and distribute user guides.
- Communication: Confirm all stakeholders are informed and onboard.

10. Communication plan

Communication Plan for Transitioning to SQUIRE Software

Objective

Ensure clear, timely, and effective communication with all stakeholders—customers and employees—about the transition to SQUIRE software, highlighting benefits, minimizing confusion, and fostering trust.

Key Stakeholders

Internal:

- Barbershop Owner
- Barbers and Staff

External:

- Customers
- Vendor
- Consultant

Communication Channels

- **Internal Communication:**

- **Kickoff Meeting:** Initial overview of the deployment plan and goals.

- **Daily Check-Ins During Deployment:** Quick updates on progress and any arising issues.
 - **Training Sessions:** Interactive and hands-on workshops.
 - **FAQ Document:** create and share FAQ document.
 - **Email Updates:** Progress summaries and reminders about key tasks/dates.
 - **Post-Implementation Feedback Sessions:** Gather staff input and address concerns.
- **External Communication:**
 - **In-Shop Notices:** Posters and flyers detailing the benefits of the new system and transition timeline.
 - **Email or SMS Notifications:** Inform about any downtime or changes in the booking process.
 - **Social Media Announcements:** Highlight the improved booking experience and how to access the new system.

Communication Timeline

Phase	Audience	Message	Channel	Responsible Party
Announcement	Staff	Inform about the transition, benefits and timeline	Team meeting, email	Owner/Manager
Announcement	Customers	Notify about the change, emphasize improved experience	Email, social media and in store	Owner
Announcement	Consultants	Share implementation plan, timeline, and seek validation.	Email, video meeting	Owner/Manager
Announcement	Vendor	Confirm timeline, responsibilities, and expectations.	Email, scheduled calls	Owner
Training Period	Staff	Share training materials and schedule	Email, in-person sessions	Implementation team
Pre-Launch	Customers	Remind about upcoming changes and provide guidance	Social media, email, SMS	Owner/Manager
Go-Live	Staff	Provide support	Team	Owner/Manager

		resources	meeting, email	
Go-Live	Customers	Announce launch, share “How-to” resources	Survey, team meeting	Owner/Manager
Go-Live	Vendor	Monitor system performance and address issues.	Real-time tracking, scheduled calls	Implementation Team
Follow-Up	Staff	Collect feedback on adoption, address challenges	Survey, team meeting	Owner
Follow-Up	Customers	Request feedback, highlight success stories	Social media, email	Owner

Key Messages

- **For Staff:**
 - “We’re transitioning to SQUIRE software to streamline our operations and enhance the customer experience.”
 - “You’ll receive comprehensive training and support to ensure you’re comfortable with the new system.”
 - “We welcome your feedback to make this transition as smooth as possible.”
- **For Customers:**
 - “Exciting news! We’re upgrading to SQUIRE to make booking easier and better for you.”
 - “This change means faster scheduling, better reminders, and a more seamless experience.”
 - “We’ll guide you through any updates to ensure you can continue booking with ease.”
- **For Consultants:**
 - “We will provide regular updates on implementation progress and feedback collected from stakeholders.”
 - “Your insights and ongoing support will help ensure the smooth deployment of SQUIRE.”
 - “We will report on system performance metrics post-go-live for validation.”
- **For the Vendor:**
 - “Please ensure training, support materials, and migration tools are available per the agreed timeline.”
 - “Your technical team’s availability for post-launch issues is critical to ensure a smooth go-live process.”

- “We'll regularly communicate progress, system concerns, and required adjustments during and after deployment.”

Action Plan

- **Create Materials:**
 - FAQ documents for staff and customers.
 - Visual guides for booking through SQUIRE.
 - Training schedules and quick-reference guides for employees.
- **Schedule Communication:**
 - Announcements one month before go-live.
 - Reminder messages two weeks before go-live.
 - Follow-up communication post-launch.
- **Assign Roles:**
 - Owner/Manager: Oversee communication strategy and approve materials, draft messages, schedule posts/emails, and manage customer inquiries.
 - Implementation Team: Handle technical training and support.
 - Consultants: Provide advisory support, validate implementation decisions, and assist in stakeholder alignment.
 - Vendor: Ensure timely data migration, training, and technical support.

Feedback Mechanism

- **Staff:** Weekly team meetings and anonymous surveys using GoogleForms for feedback.
- **Customers:** Post-implementation survey link to SurveyMonkey shared via email and social media.

Success Metrics

- High attendance rate for staff training sessions.
- Minimal customer complaints about the new system within the first month.
- Positive feedback on the new booking process from at least 75% of surveyed customers.
- Increase in booking confirmations and reductions in no-shows within the first three months.

11. Training Plan for Integrating Squire at Number One Barbershop

The training plan for Squire at Number One Barbershop integrates the onboarding process and a structured RACI framework. This plan ensures a seamless adoption of the platform, enabling employees and the owner to fully utilize its features while minimizing disruptions to operations.

The training involves all stakeholders at the barbershop, including the owner/manager and employees. The owner, as the primary decision-maker and system administrator, plays a pivotal role in overseeing the implementation, configuring advanced features, and managing analytics. Employees, primarily barbers, are responsible for using the system's booking, payment, and client management features. Squire's onboarding specialists and dedicated account managers support the process, offering guidance, live support, and troubleshooting expertise throughout the implementation.

The training covers the critical functionalities of Squire, tailored to the roles of each participant. For the owner, the focus is on advanced tools like reporting, staff management, and system configuration. Employees will learn to handle day-to-day tasks such as managing appointments, processing payments, recording tips, and interacting with client profiles. The onboarding also includes data migration from legacy systems, ensuring a smooth transition of client records, inventory data, and financial information into Squire's platform.

The training will be executed in phases over a period of one week. During the first phase, foundational training will include an introduction to the system and hands-on practice in a sandbox environment. The second phase will focus on live operations, where users interact with real data while receiving live support. Periodic follow-ups and refresher sessions will be scheduled after the system goes live to address any gaps or updates in functionality.

The training process combines interactive sessions, live demonstrations, and hands-on practice to cater to different learning preferences. Squire's onboarding specialists will conduct virtual walkthroughs of the platform, demonstrating key features such as appointment scheduling, payment processing, and inventory management. Employees will then practice these tasks in a safe, simulated environment, ensuring familiarity before live deployment. Ongoing support will be provided during the initial go-live phase to resolve real-time issues and reinforce training. Resources such as user manuals, video tutorials, and an online knowledge base will complement the live sessions and provide a reference for ongoing learning.

The training will primarily occur online through Squire's virtual support and learning environment, ensuring flexibility and accessibility for all participants. For tasks that require on-site interaction, such as device setup and integration, the sessions will take place at the barbershop premises. Employees will also have access to mobile and desktop platforms to practice their tasks using the devices they'll operate during daily operations.

This training plan, built on the collaboration of Squire's specialists, the barbershop's owner, and employees, ensures a thorough and efficient adoption of the platform. The integration of the onboarding process into the RACI framework guarantees clear responsibilities, practical application, and continuous support, setting the foundation for streamlined operations and enhanced customer experiences.

The RACI chart in Appendix L demonstrates an organized approach to the training plan of the new system at Number One Barbershop. The graphic indicates whose roles are responsible, accountable, consulted, or informed about each critical task. This facilitates easy communication, reduces confusion,

and increases efficiency throughout the project, all of which contribute to the effective implementation of the new system.

12. Conclusion

This assessment was conducted following Number One Barbershop's engagement of our services under the BTM 481 Information System Analysis and BTM 496 Information Technology Strategy, Management, and Sourcing courses. Our mandate was to evaluate their IT system and recommend an outsourced solution to address existing weaknesses while supporting their future growth and expansion plans.

Our team recommends a tailored solution from **Squire Technologies Inc.**, as it best aligns with the corporate identity and operational needs of Number One Barbershop. Squire's proven track record and specialized focus on the barber business model meet all outlined requirements derived from their business needs. Additionally, this solution supports the scalability goals necessary for increasing business capacity and expanding to multiple locations in the future. Among the options considered, Squire offers the best value proposition, balancing cost-efficiency, ease of implementation, and long-term benefits.

However, we identified potential risks associated with certain clauses in Squire's agreement. To mitigate these risks, we recommend that Number One Barbershop negotiate key amendments. These measures will help safeguard the business against financial, operational, and legal vulnerabilities, ensuring control is maintained and potential disruptions are minimized.

We strongly urge you to approve this recommendation and allow us to proceed with the final implementation steps. This decision will enable Number One Barbershop to achieve its strategic vision and continue thriving in a competitive market.

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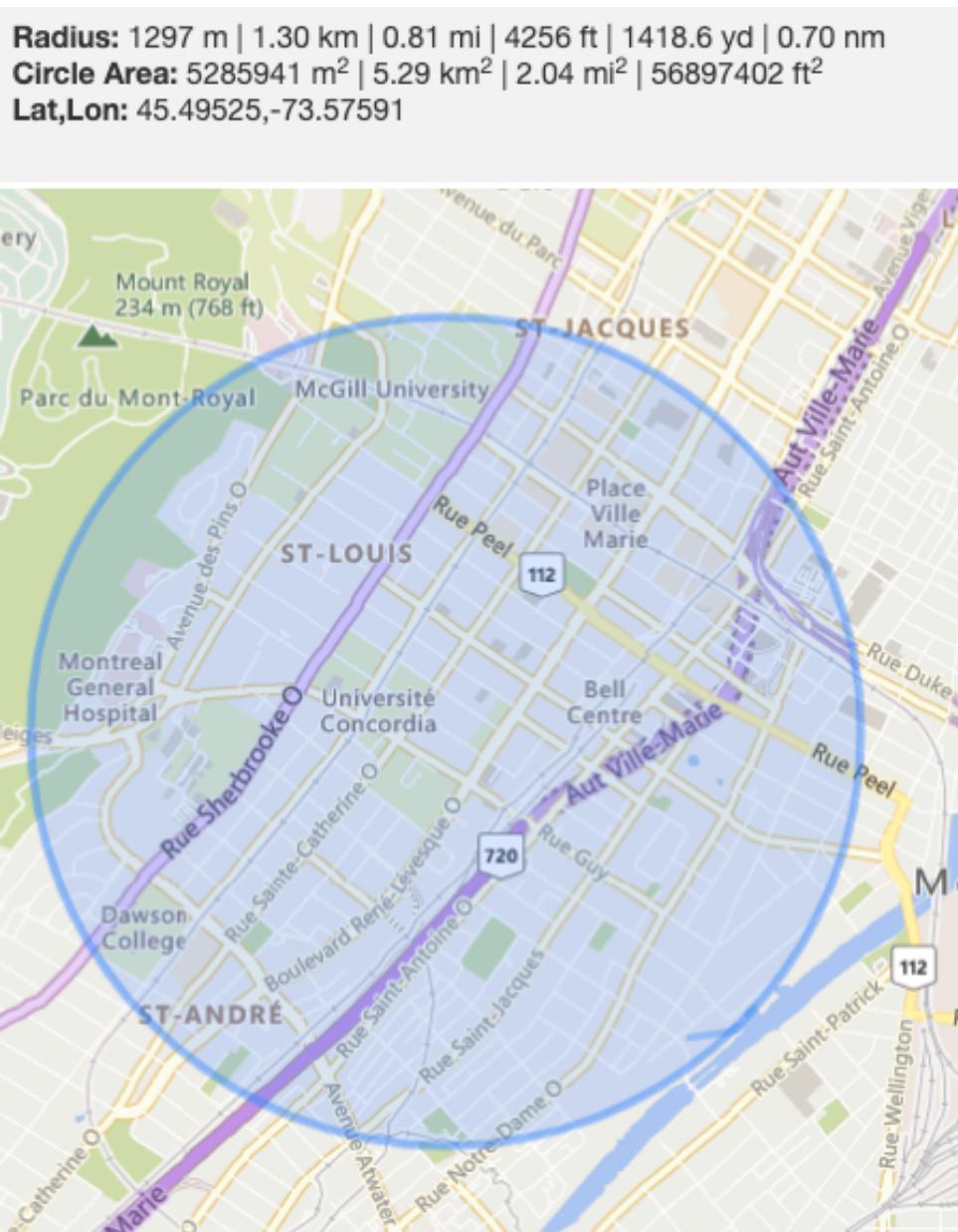
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Appendix

Appendix A - Service Coverage location of Number One Barber shop



**IT Spending Ratios
Between 25th and 75th Percentiles, by Industry**

IT Spend as...	Discrete Mfg	Fin'l Services	High Tech	Retail	Health care
Percentage of Revenue	1.4%-3.2%	4.4%-11.4%	2.6%-4.7%	1.2%-3.0%	3.0%-5.9%
Per User	\$3,733-\$9,864	\$13,772-\$26,667	\$6,191 - \$11,653	\$3,913 - \$14,685	\$3,157 - \$6,143
Per Desktop/Laptop	\$4,658-\$9,395	\$12,171 - \$23,882	\$5,452-\$9,218	\$4,806-\$13,533	\$3,280-\$7,273

Source: Computer Economics, 2019

Figure 1

Appendix C - IT Project Budget Calculation

Number One Barbershop	
Hair + Beard	\$56.00
Nº of Barbers	5
Revenue Per day (Assuming each barber gets 6 service requests per day)	\$1,680.00
Revenue Per Week (Barbershop is open Monday through Saturday, thus 6 days)	\$10,080.00
Revenue Per Yearl (Calculating 49 weeks per year since each barber gets 3 weeks vacation)	\$493,920.00
IT lower end Budget (1.2%)	\$5,927.04
IT higher end Budget (3%)	\$14,817.60

Appendix D - TCO Calculation for Square

Square			
Fixed Costs		Variable Costs	
One time Payment	\$ 49.00	Transaction Fee Cost	\$ 8,634.96
Equipment Cost	\$ -	Additional Transaction Cost	\$ 833.49
Subscription cost Annually	\$ 348.00		
Acquisition Cost =			\$ 49.00
Operational Cost per Year =			\$9,816.45
TCO (5 Years) =			\$ 49,131.23

Payment Processing Fees	Software Subscription Plans	Hardware Costs
In-Person Transactions: 2.65% per transaction. Online Transactions: 2.9% + 30¢ per transaction.	Plus Plan: \$29 per month per location.	Square Reader for Contactless and Chip: \$49

Appendix E - TCO Calculation for Squire

Squire			
Fixed Costs		Variable Costs	
One time Payment	\$ 199.00	Transaction Fee Cost	\$ 3,267.28
Equipment Cost	\$ 799.00	Additional Transaction Cost	\$ 1,389.15
Subscription cost Annually	\$ 780.00		
		Acquisition Cost =	\$ 998.00
		Operational Cost per Year =	\$ 5,436.43
		TCO (5 Years) =	\$ 28,180.15

Fixed Cost One Time Payment	Subscription Costs	Variable Costs
\$199 Setup Fee \$300 WISE POS \$499 Ipad purchase price	\$65 Per Month	Credit Card Fees: 1.5% + \$0.20 per Transaction Apple Pay and Google Pay: 1.5% + \$0.30 per Transaction

Appendix F - TCO Calculation for Fresha

Fresha			
Fixed Costs		Variable Costs	
One time Payment	\$ -	Transaction Fee Cost	\$ 7,642.33
Equipment Cost	\$ 500.00	Additional Transaction Cost	\$ 1,389.15
Subscription cost Annually	\$ 635.40		
Acquisition Cost =			\$ 500.00
Operational Cost per Year =			\$ 9,666.88
TCO (5 Years) =			\$ 48,834.38

Fixed one-time cost	Subscription costs	Variable Costs
\$500 card Terminal	\$10.95 per Barber	Online Transactions: 2.79% + \$0.20 per transaction In-Person Transactions: 2.29% + \$0.20 per transaction Tap to Pay: 2.29% + \$0.35 per transaction

Appendix G - TCO Calculation for Phorest

Phorest			
Fixed Costs		Variable Costs	
One time Payment	\$ 250.00	Transaction Fee Cost	\$ 5,134.30
Equipment Cost	\$ -	Additional Transaction Cost	\$ -
Subscription cost Annually	\$ 1,548.00		
Acquisition Cost =			\$ 250.00
Operational Cost per Year =			\$ 6,682.30
TCO (5 Years) =			\$ 33,661.49

Fixed One-time Payment	Subscription Fees	Variable Costs
\$250 Enrollment Fee	\$129 Per Month	1.65% per Transaction

Appendix H - TCO Calculation for Vagaro

Vagaro			
Fixed Costs		Variable Costs	
One time Payment	\$ -	Transaction Fee Cost	\$ 7,654.77
Equipment Cost	\$ 100.00	Additional Transaction Cost	\$ 1,144.66
Subscription cost Annually	\$ 120.00		
Acquisition Cost =			\$ 100.00
Operational Cost per Year =			\$ 8,919.43
TCO (5 Years) =			\$ 44,697.16

Large Merchants

For businesses with a processing volume of more than \$4,000 per month.

Swiped

2.2% + \$0.19 per swipe

Keyed-in

3.0% + \$0.19 per keyed-in transaction

Tap to Phone

2.2% + \$0.24 per tap

Note

There is a \$10 monthly subscription for Large Merchants. The FANF and the Mastercard Location fees are not absorbed by Vagaro.

If you disable this feature before your billing date, you will still be charged for the feature at the end of your billing cycle, regardless of when you deactivated it.

Wisepad 3

\$100

This Wisepad Credit Card Reader+ works with MACs, PCs, iPads and Android devices. The EMV reader+ is capable of Pay, Google Pay, Samsung Pay, NFC, Dip, and Swipe.

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* requires Vagaro merchant account

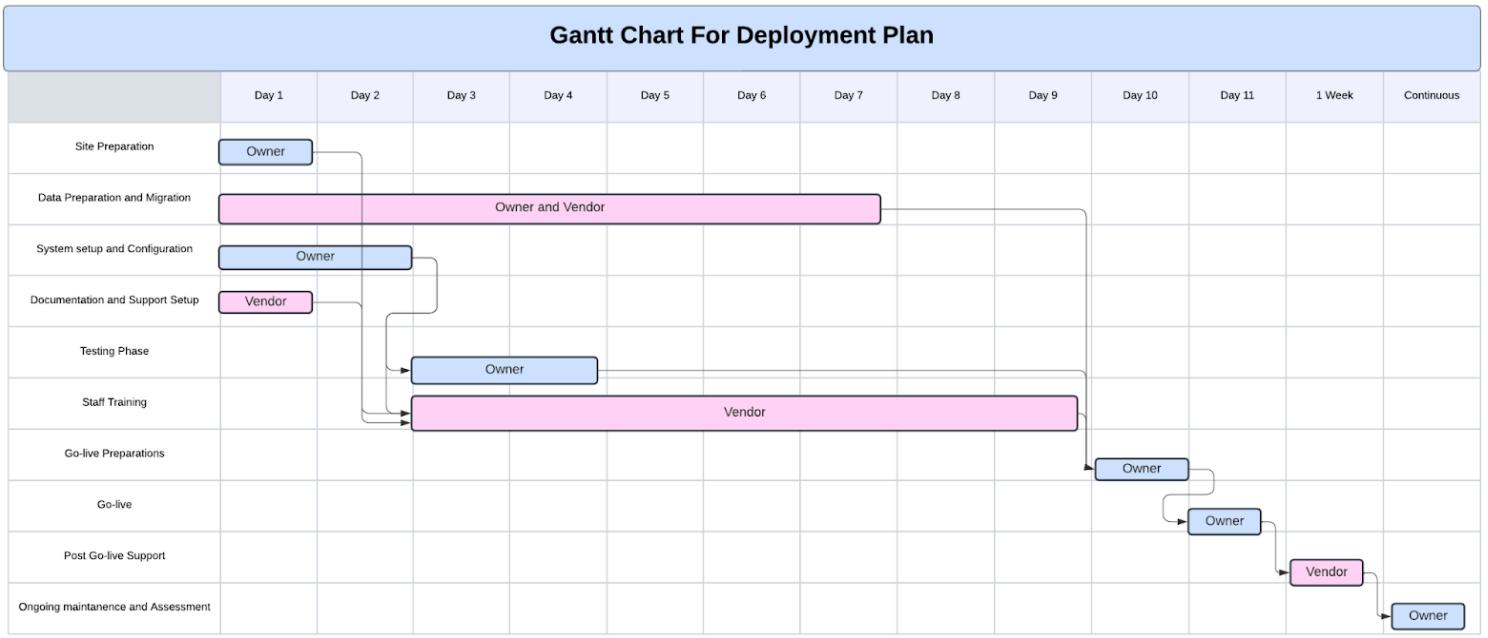


Ground shipping (3-5 business days)

Appendix I - Evaluation Matrix

Mandatory Criteria	Weight	Square	Squire	Phorest	Fresha	Vagaro	
Acquisition Cost	YES/NO	Yes	Yes	Yes	Yes	Yes	
Language (FR/EN)	YES/NO	Yes	Yes	Yes	Yes	Yes	
Input availability	YES/NO	Yes	Yes	Yes	Yes	Yes	
Customer details	YES/NO	Yes	Yes	Yes	Yes	Yes	
Walk-in booking	YES/NO	Yes	Yes	Yes	Yes	Yes	
Booking confirmation	YES/NO	Yes	Yes	Yes	Yes	Yes	
Performance	YES/NO	Yes	Yes	Yes	Yes	Yes	
Reliability	YES/NO	Yes	Yes	Yes	Yes	Yes	
Data Security and Privacy Compliance	YES/NO	Yes	Yes	Yes	Yes	Yes	
System Uptime	YES/NO	Yes	Yes	Yes	Yes	Yes	
Inventory Tracking	YES/NO	Yes	Yes	Yes	Yes	Yes	
Automated Notification	YES/NO	Yes	Yes	Yes	Yes	Yes	
Product Categorization	YES/NO	Yes	Yes	Yes	Yes	Yes	
Availability	YES/NO	Yes	Yes	Yes	Yes	Yes	
Payment Processing	YES/NO	Yes	Yes	Yes	Yes	Yes	
Receipt Issuance	YES/NO	Yes	Yes	Yes	Yes	Yes	
Commission Calculation	YES/NO	Yes	Yes	Yes	Yes	Yes	
Tips Recording	YES/NO	Yes	Yes	Yes	Yes	Yes	
Support Language	YES/NO	Yes	Yes	Yes	Yes	Yes	
Data Security and Privacy Compliance	YES/NO	Yes	Yes	Yes	Yes	Yes	
Multi-Device Access	YES/NO	Yes	Yes	Yes	Yes	Yes	
Scalability	YES/NO	Yes	Yes	Yes	Yes	Yes	
Desirable Criteria	Weight	Score (from 0.0 to 1.0)					
Functionality & Fit	Recurring Appointment Scheduling	5.0%	1.0	1.0	1.0	1.0	0.80
	Seasonal Demand Forecasting	5.0%	0.0	0.0	0.2	0.0	0.00
	Inventory Shrinkage	5.0%	0.6	0.8	0.8	0.6	0.80
Quick Implementation	System Deployment	5.0%	1.0	1.0	0.8	1.0	1.00
	Data Migration	7.5%	1.0	1.0	1.0	1.0	0.80
TCO (Total Cost of Ownership)	TCO /5 year	25.0%	0.2	1.0	0.8	0.4	0.60
Customization	Commission Split	10.0%	1.0	1.0	1.0	0.6	1.00
	No-Show Fee	7.5%	1.0	1.0	1.0	1.0	1.00
Vendor Support	Around the Clock Support	5.0%	0.8	1.0	1.0	0.2	1.00
	Medium of Support	5.0%	0.8	1.0	1.0	0.4	1.00
Scalable	Future Expansion	5.0%	0.8	1.0	1.0	0.8	1.00
Ease of Use	Ease of Access	5.0%	1.0	1.0	1.0	1.0	1.00
	Support Documentation	5.0%	0.6	0.8	0.8	0.8	0.80
	Onboarding & Training from the vendor	5.0%	0.6	0.8	1.0	0.6	1.00
Total Score		100.0%	0.66	0.92	0.88	0.63	0.81

Appendix J - Deployment Plan Gantt-Chart



Appendix K - RACI Matrix for Deployment Plan

RACI Matrix For Deployment Plan					
Task	Owner	Vendors	Consultants	Barbers	Customers
Site Preparation	R,A	C	C	I	N/A
Data Preparation and Migration - Data Exportation	R,A	I	C	N/A	N/A
Data Preparation and Migration - Data Migration	I	R,A	N/A	N/A	N/A
System Setup and Configuration	R,A	C	I	N/A	N/A
Documentation and Support Setup	I	R,A	N/A	I	N/A
Testing Phase	R,A	C	N/A	I	N/A
Staff Training	A	R	N/A	I	N/A
Go Live Preparation	R,A	C	N/A	I	N/A
Go Live	R,A	C	I	I	I
Post Go Live Support	A	R	N/A	I	N/A
Ongoing Maintenance and Assessment	R,A	C	N/A	N/A	N/A

R = Responsible, A = Accountable, C = Consulted, I = Informed

Appendix L - Training Plan RACI Matrix

RACI Matrix For Training Plan				
Training Activity	Owner/Manager	Trainer (Squire)	Consultants	Barbers
Preparation: Configure system settings	A	R	C	C
Preparation: Set up devices	A	R	C	I
Orientation: System overview demo	A	R	C	I
Hands-On: Booking and scheduling	A	R	N/A	I
Hands-On: Payment and POS training	A	R	N/A	I
Hands-On: Inventory management	A	R	N/A	I
Live Operations: On-site support	R,A	C	C	I
Feedback: Collect feedback	R,A	C	N/A	I
Continuous Learning: Refresher sessions	R,A	C	C	I

R = Responsible, A = Accountable, C = Consulted, I = Informed



Request for Proposal (RFP)

RFP Number	001
RFP Name	IT System Implementation for Number One Barbershop
Date Issued	November 1st , 2024
Contact Person:	CIO of BTM 496 Consultant Team
Contact Info:	CIO@numberonebarbier.com +1438-467-2259
Submittal Accepted Until:	November 27th , 2024

Purpose of RFP	Number One Barbershop is seeking proposals from qualified vendors to provide a cloud-based IT solution to streamline operations. The proposed system should cover booking and scheduling, payment processing, inventory management, reporting, and client management. This RFP outlines our requirements to identify the best solution tailored to our business needs, ensuring scalability, reliability, and user-friendliness.
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Goals	Objectives
Automate booking and scheduling to reduce manual errors and improve customer convenience.	Implement a reliable, cloud-based IT system within 6 weeks.
Simplify payment processing with multiple options (cash, credit, debit).	Ensure seamless migration of existing data to the new platform.
Implement an inventory management system to track stock levels and generate low-stock alerts.	Train employees and the manager to maximize the system's functionality.
Provide robust reporting and analytics for data-driven decision-making.	Minimize operational disruptions during deployment and transition.

Project Background	Number One Barbershop is a premium grooming service provider dedicated to offering high-quality haircuts and beard trims. Currently, the barbershop faces operational challenges due to manual processes for scheduling, payments, and inventory. These inefficiencies result in lost revenue opportunities and hinder future expansion.
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Project Summary	The proposed IT solution aims to address these challenges by introducing a centralized system that integrates all critical functions. With enhanced automation, the solution will improve customer satisfaction, optimize resource allocation, and reduce administrative burden. The vendor will provide the necessary tools, implementation support, and ongoing maintenance to ensure a seamless transition to the new system.
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Scope of Work	
Project Tasks	<ul style="list-style-type: none"> • Assess current operational workflows and data structures. • Migrate existing customer, inventory, and financial data to the new platform. • Configure the system to support all mandatory requirements (such as booking, payment processing, reporting). • Train staff and management to use the system effectively. • Provide ongoing support and system updates post-implementation.
Project Deliverables	<ul style="list-style-type: none"> • Fully operational IT system tailored to barbershop needs. • Complete migration of existing data with no loss or errors. • Staff training sessions and comprehensive user manuals. • Post-deployment support • Analytics and reporting tools to monitor business performance.
Project Exclusions	<ul style="list-style-type: none"> • Hardware procurement for staff devices. • Development of custom features not outlined in the requirements. • IT infrastructure updates beyond the proposed system's scope.

Project Timeline		
Phase	Key Activities	Timeline
Setup and preparation	Communicate with stakeholders, perform data backup, audit Setmore system for inconsistencies. Install Squire, customize the system based on barbershop-specific requirements (e.g., booking, payment, and inventory needs)	Week 1
Testing and Training	The plan tests core features and edge cases for reliability. A one-week training equips staff with skills in booking, payments, troubleshooting, and communication for efficient system operation.	Week 2
Deployment	Final checks, data migration, and staff readiness, as the barbershop transitions fully to the new SaaS system. On launch, replace booking links, cancel Setmore, and monitor performance	Week 2
Post deployment support	Assistance to resolve issues and ensure smooth operations, with regular tracking and reporting for timely resolutions during the transition.	Week 3

Project Timeline		
Monitoring	Ongoing maintenance includes continuous monitoring of KPIs like uptime, error rate, transaction success, customer retention, and feedback to ensure system reliability, address issues, and optimize business performance.	Continuous

Project Budget	<p>The maximum allowable cost for the project has been set at \$14,817.60, ensuring it stays within the defined budget constraints.</p> <ul style="list-style-type: none"> • Projects that fully meet all specified requirements will be prioritized as top choices. • Projects with total costs under the maximum budget of \$14,817.60 will also be given better consideration.
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Instructions for Submission of Proposals	<p>Bidders must submit two (2) hard copies and one (1) digital copy in PDF format. Digital copies should be emailed to CTO@numberonebarbier.com, while hard copies must be delivered to 1228 Mackay St, Montreal, QC, marked with the RFP Number, RFP Name, and Bidder Name.</p> <p>Submissions must be received by November 27th , 2024 no later than 11:59 PM. Late submissions will not be accepted.</p>
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Selection Criteria	Proposals will be evaluated based on mandatory requirements, cost and TCO over five year , desirable
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features , implementation timeline, bidder qualifications , and post-implementation support . Bidders must demonstrate expertise in IT solutions for small businesses, successful project execution, and robust post-deployment support to be considered.

Bidder Qualifications

- Minimum of 5 years of experience in providing IT solutions for small to medium-sized businesses.
- Proven track record of successful implementation of systems similar to the requirements of this project.
- Ability to provide local or remote support during and after implementation.

 1228 Rue Mackay
Montréal, QC H3G 2H4

 438-467-2259

 number.one.barbershop

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Vendor's Standard Contract and Terms of Use

SQUIRE Technologies, Inc. Enterprise Terms of Service

Published Date: January 31, 2024

Effective Date: February 1, 2024

INTRODUCTION

Squire Technologies, Inc. (“**Squire**,” “**we**”, “**us**”, “**our**”) offers an all-in-one online software platform for barbers, hair stylists and other professionals (the “**Squire Platform**”) through which Squire provides services designed specifically to optimize the operations of barbershops, hair salons and other businesses (the “**Squire Services**”). For Enterprise Customers (“**you**”, “**your**” or “**Enterprise Customer**”), we offer access to Squire’s Services through the Squire Platform which includes our Websites and Applications. By creating a Squire Platform Account or using the Squire Services, you agree that you have read, understand, and accept all of the terms and conditions contained by this Enterprise Terms of Service (“**Enterprise Terms**”), the [Privacy Policy](#) (“**Privacy Policy**”) and the [Shop User License Agreement](#) (“**SULA**” and together with these Enterprise Terms and the Privacy Policy, this “**Agreement**”). Certain functionality or features available through or in connection with the Squire Services may be provided by Third-Party Providers, and you may be required to enter into Third-Party Terms with such Third-Party Providers to enable the functionality or access such features (see Section III below for more details). If you do not agree to the terms of this Agreement, you must immediately stop your use of the Squire Platform and Squire Services. Capitalized terms used herein and not otherwise immediately defined are defined in Section I (“Definitions”) below.

We reserve the right to change the Enterprise Terms at any time. If we do so, the most up-to-date version of these Enterprise Terms will be located at www.getsquire.com/enterprise-terms-of-service. We may provide reasonable notice to you of updates to the Enterprise Terms via email or notifications through the Squire Services. The revised version of the Enterprise Terms will be effective as of the “**Effective Date**” indicated at the top of the webpage. It is your responsibility to review and understand the latest version of these Enterprise Terms. If you do not agree with the new Enterprise Terms, you must reach out to support@getsquire.com to terminate your use of the Squire Platform and Squire Services and to close your Squire Platform Account. Your continued use of the Squire Platform and Squire Services in any way after a change to the Enterprise Terms is effective constitutes your acceptance to the updated Enterprise Terms. This paragraph does not apply to changes under Section IV(b) or Section V(i), which are governed by the provisions of those Sections of the Enterprise Terms.

This Agreement applies to any use of or access to the Squire Platform, Squire Services and Third-Party Services by you, your Affiliates and/or your Shop User(s) and is made effective on

the earlier of: (i) the date you accept this Agreement via click through, clickwrap, or other digitized method where you clicked a button or checked a box signifying “I agree,” whether be it through a self-guided online sign-up, an Order Form, or any other agreement indicating affirmative acceptance; or (ii) the date you, or your Affiliate, or your Shop User(s) first uses or accesses the Squire Platform and/or Squire Services.

I. DEFINITIONS.

“Account ID” means the username and password information you created to access your Squire Platform Account.

“Affiliate” means, (a) with respect to Enterprise Customer, any entity that directly or indirectly controls, is controlled by, or is under common control with Enterprise Customer that has been designated to have access to the Squire Services under this Agreement, including any Order Form; and (b) with respect to Squire, any entity that directly or indirectly controls, is controlled by, or is under common control with Squire Technologies, Inc.

“Applications” means any web or mobile application through which the Squire Services are made available, including but not limited to, SQUIRE Commander® web and mobile applications and any Enterprise-Branded App.

“Business Day” means any day Monday through Friday, excluding weekends and public holidays of Enterprise Customer’s local jurisdiction.

“Chargebacks” means a request that a cardholder files directly with its issuing bank to invalidate and reverse a transaction made with a credit or debit card.

“Client” means a client of Enterprise Customer seeking barbing, hair styling, or other services.

“Client Contract” means a contract concluded via the Squire Platform between an Enterprise Customer and a Client for the supply of barbing, hair styling, or other services by the Enterprise Customer to the Client (e.g. each time a client books services via the Squire Platform, the Client has entered into a Client Contract with Enterprise Customer).

“Dispute” means a dispute between you and Squire with respect to the Squire Services (excluding disputes related to the processing or settlement of Transactions).

“Enterprise-Branded App” means, pursuant to a request by Enterprise Customer (on an Order Form or otherwise), any web or mobile application (including any widget) developed by Squire as a white-labeled application outfitted with Enterprise Customer’s desired branding, which Squire licenses to Enterprise Customer so that Enterprise Customer’s Clients, as end users, may access Enterprise Customer’s services.

“Hardware” means any hardware device, such as a payment chipper or a tablet computer, provided by Squire as part of the Squire Services.

“Initial Term” means the initial period of time agreed upon in the Order Form during which Squire is obligated to provide access to the Squire Platform and Squire Services.

“Linked Account” means any external deposit or payment account owned by you, your Affiliates or a Shop User designated by you in the Squire Platform to receive the proceeds of Transactions or pay amounts owed to us.

“Order Form” means the separate ordering document, invoice, online form, or other agreement agreed to by Enterprise Customer that specifies the Squire Services purchased and the applicable Subscription Fees and Platform Fees, as well as any applicable Hardware, deliverables, or other one-time upfront fees. To the extent the terms of the Order Form and these Enterprise Terms conflict, the terms of the Order Form shall prevail solely with respect to the conflicting matter.

“Payment Processing Services” means services that enable you to accept and process credit or debit card payments from Clients for your goods and services.

“Payment Processor” means the provider of Payment Processing Services, which is a Third-Party Provider. Currently, the Payment Processor is Stripe, Inc.

“Personal Information” has the same meaning as defined in the [Privacy Policy](#).

“Platform Fees” is the umbrella term for the fees charged to Enterprise Customer to cover costs associated with administering the Squire Platform and delivering the Squire Services (including, but not limited to, transaction costs, legal and compliance fees). The list of the Platform Fees being charged to Enterprise Customer under their Squire Platform Account will be listed on the applicable Order Form.

“Primary Enterprise Contact” means the Shop User (defined below) designated by the Enterprise Customer with the authority to act on behalf of Enterprise Customer, including entering this Agreement or making changes to the Enterprise Customer’s Squire Platform Account.

“Shop Location” means the business location or locations designated by Enterprise Customer to have access to the Squire Services.

“Shop User” means any barber, hair, or other professional that is both: (i) designated and authorized by Enterprise Customer to have access to the Squire Services; and (ii) is either: (x) employed by Enterprise Customer; or (y) renting a workstation from Enterprise Customer at a particular Shop Location. Enterprise Customer must ensure its Shop Users read and agree to the [Shop User License Agreement](#) on their own behalf, or on behalf of Enterprise Customer as applicable.

“Renewal Term” means after the Initial Term of a Subscription Term, any subsequent term during which Squire is obligated to provide access to the Squire Platform and Squire Services.

All Subscription Terms are subject to automatic renewal of the same length of time as the Initial Term, unless expressly stated otherwise in the Order Form.

“Squire Parties” is defined below in Section XI(f).

“Squire Platform Account” means the data account within the Squire Platform created for Enterprise Customer to access the Squire Services on the Squire Platform.

“Subscription Package” means the bundle of functionality, services, and features marketed as a package by Squire as may be described from time to time on any of the Websites.

“Subscription Fees” means the fees charged monthly to Enterprise Customer for access to the Squire Platform and Squire Services.

“Subscription Term” means the period of time during which Squire is obligated to provide access to the Squire Platform and Squire Services as described by the applicable Order Form and Enterprise Customer is bound to timely pay the Subscription Fees. Each Subscription Term includes the Initial Term and any Renewal Term after that.

“Third-Party Provider” means any third-party service provider with which you and/or Squire contracts to provide services to you or Squire or on behalf of Squire in connection with providing the Squire Services, including a Payment Processor.

“Third-Party Services” means a feature or functionality of the Squire Services that are provided by a Third-Party Provider and are subject to Third-Party Terms.

“Third-Party Terms” means any agreements, terms, and conditions of a Third-Party Provider applicable to the services provided to Squire or on behalf of Squire to which Enterprise Customer must agree to access certain of the Squire Services.

“Transaction” means the payment, receipt or transfer of funds for a purpose permitted by this Agreement.

“Websites” means any website owned and operated by Squire through which the Squire Services are made available, including but not limited to: (i) www.getsquire.com; and (ii) online.getsquire.com.

II. SQUIRE PLATFORM ACCOUNT

You must create an account as an Enterprise Customer to access the Squire Platform.

1. **You Must Be Eligible to Sign Up:** By creating a Squire Platform Account, the Primary Enterprise Contact that is agreeing to this Agreement represents and warrants the following:
 - i. Authority: The Primary Enterprise Contact has been duly authorized to agree to the terms of this Agreement, bind the Enterprise Customer and act on behalf of the

Enterprise Customer to create the Squire Platform Account.

ii. Eligibility: The Primary Enterprise Contact is (i) at least 18 years of age, (ii) not located in Cuba, Iran, North Korea, Syria, or any other territory that is subject to a U.S. government embargo, or that has been designated by the U.S. government as a “terrorist-supporting” country; and (iii) not be listed on any U.S. government list of prohibited or restricted persons or UK Sanctions List. The Enterprise Customer is a commercial business operating via a legal corporate entity or, for any individuals, acting as a sole proprietor or a partnership in the course of your business, trade or profession.

iii. True and Correct Information: You represent that you have provided true, accurate, current and complete information about yourself and/or the Enterprise Customer as prompted by the Squire Platform’s registration process and as requested from time to time by Squire (such information, “**Registration Data**”). You further represent that in providing such Registration Data, you have not knowingly omitted or misrepresented any material facts or information and that you will promptly enter corrected or updated Registration Data via the Squire Platform, or otherwise advise us promptly in writing of any changes or updates to your Registration Data.

iv. Linked Account: Enterprise Customer must connect a Linked Account to its profile to receive the Squire Services, including to receive Transaction settlement from Payment Processor.

2. **Our Privacy Policy and Data Processing Agreement Applies:** We take data privacy very seriously. Squire’s policy regarding the collection, use, and sharing of Personal Information it gathers about you (and your Affiliates and Shop Users designated by you who may use or access the Squire Platform and Squire Services) is set forth in these Enterprise Terms and the [Privacy Policy](#). As stated above, use of the Squire Platform and Squire Services is contingent upon you agreeing to the terms of the Privacy Policy. Please review the Privacy Policy very carefully. Further, in connection with your use of the Squire Platform and the Squire Services, Squire may collect, use, store, transfer or otherwise process Personal Information provided by you on your behalf. To clearly define the roles between Enterprise Customer and Squire as it relates to the processing of Personal Information, you hereby acknowledge and agree to the terms of the [Data Processing Agreement \(Enterprise Customer x Squire Technologies, Inc.\)](#).

3. **We May Need to Create an Account with a Third-Party Provider On Your Behalf:** During the signup process for the creation of your Squire Platform Account, we will ask you to provide Registration Data. To utilize certain Squire Services, you may need an account with a Third-Party Provider, in which case we may need to create an account with a Third-Party Provider on your behalf. To the extent that you provide us with Registration Data for the purpose of creating an account with a Third-Party Provider, we will use such Registration Data in accordance with this Agreement, including for the purpose of assisting you in creating such account.

4. **You Will Need to Grant Us Access to Your Contacts.** You acknowledge and agree that you may choose to allow the Squire Platform to access your contacts list (which

may include among other things names, telephone numbers, e-mail addresses) stored on your computer, tablet, laptop, or mobile device from an application on your device or from a separate digital file (e.g. .pdf, .doc, .exl, etc.) that you will share with Squire (“**Contact Lists**”). Squire will use your Contact Lists solely to provide the Squire Services, including to allow you to contact your Clients. You grant Squire the right to process your Contact Lists and other Client data (together, “**Client Data**”) as necessary to provide the Squire Services in a manner consistent with this Agreement. You represent and warrant that you have provided, and will continue to provide, adequate notices and have obtained, and will continue to obtain, the necessary permissions and consents to provide your Client Data to us for use and disclosure pursuant to this Agreement.

5. **We May Need to Authenticate Your Identity:** You agree to cooperate with all requests made by us in connection with your Squire Platform Account to identify you (and your Affiliates or Shop Users, as well as any of your authorized representatives, directors, officers, etc.), authenticate your identity, or validate your funding sources or Transactions. Squire reserves the right to close, suspend, or limit access to your Squire Platform Account and/or the Squire Services in the event we or any Payment Processor or other Third-Party Provider are unable to obtain or verify such information. You authorize Squire, directly or through our Third-Party Providers, to make any inquiries we consider necessary to validate your identity. This may include asking you for further information, requiring you (and your Affiliates or Shop Users, as well as any of your authorized representatives, directors, officers, etc.) to provide date of birth, a taxpayer identification number and other information that will allow us to reasonably identify you, including requiring you to take steps to confirm ownership of your email address or Linked Account or verifying your information against third party databases or through other sources. We may also ask to see your (and your Affiliates or Shop Users, as well as any of your authorized representatives, directors, officers, etc.) driver's license, passport or other identifying documents at any time.
6. **You Are Responsible for Safeguarding Your Account ID:** Your Account ID you created to access the Squire Platform is specific to you as the Enterprise Customer. You agree that you will not allow any unauthorized person to use your Account ID to access or use the Squire Platform and Squire Services under any circumstances. You are solely and entirely responsible for maintaining the confidentiality of your Account ID and for any charges, damages, liabilities or losses incurred or suffered as a result of your failure to do so. We are not liable for any harm caused by or related to the theft of your Account ID, your disclosure of your Account ID, or your authorization to allow another person to access or use the Squire Platform, Squire Services or Third-Party Services using your Account ID. You agree to immediately notify us at support@getsquire.com of any unauthorized use of your Squire Platform Account or any other breach of security known to you. You further acknowledge that the complete privacy of your data and messages transmitted while using the Squire Services cannot be guaranteed.
7. **We May Suspend or Terminate Your Squire Platform Account:** Squire may terminate or suspend the Squire Platform Account and/or the Squire Services with or without notice to you for any reason, which may include, but are not limited to (1) failure to timely

pay all fees when due, including any Subscription Fees; (2) violation of these Enterprise Terms or the [Privacy Policy](#) or any other terms and conditions or policies applicable to any of the Squire Websites or Squire Applications; (3) violation of any Third-Party Terms; (4) abuse of Squire resources or attempt to gain unauthorized entry to Squire systems or its resources; (5) use or suspected use (as determined by Squire in its sole discretion) of the Squire Platform or the Squire Services in a manner inconsistent with the intended purpose, including, but not limited to, any illegal purpose, fraudulent activity or infringement of the rights of third parties; (6) engagement in any of the Restricted Activities; (7) as required by law, regulation, court or governing agency order; or (8) as required by a Third-Party Provider. The termination of your access to the Squire Platform, Squire Services and/or Third-Party Services may be effective immediately. Squire shall not be liable to any user or other third party for termination of your Squire Platform Account.

8. **You May Terminate Your Squire Platform Account:** If you wish to close your Squire Platform Account, you must contact us at support@getsquire.com. Your Squire Platform Account may only be closed by the Primary Enterprise Contact. If the Primary Enterprise Contact contacts us with such a request, the Primary Enterprise Contact may be required to take certain steps to verify his, her or their identity.
9. **Effect of Termination:** Termination of your Squire Platform Account shall mean termination of any Order Form and this Agreement as well as termination of access to the Squire Services. Furthermore, termination of your Squire Platform Account shall result in the immediate revocation of any licenses granted by Squire herein as described in Section VII(a) below and termination of your Stripe Account (as defined in Section V(c)(i) below). When your Squire Platform Account is closed, we will cancel any pending instructions you have given us. Notwithstanding the foregoing, you may NOT close your Squire Platform Account to evade amounts owed by you (including liability for Chargebacks or Transactions and associated fees) or any investigation. When you close your Squire Platform Account, you authorize Squire to request the Payment Processor to freeze your account and withhold all or a portion of the amounts due to you under the Agreement for up to 180 days (or such longer period as may be required by applicable law, regulation, or third party requirement, including as required by Third-Party Providers or Third-Party Terms) to protect Squire, its Affiliates, or a third party against any liability, including Transactions and Chargebacks. You will remain liable for any obligations related to your Squire Platform Account (including Chargebacks) even after the Squire Platform Account is closed. Once your Squire Platform Account is closed, Squire will have no obligation to maintain your Squire Platform Account and any data associated therewith unless required by applicable law. Notwithstanding the foregoing, provided Enterprise Customer provides Squire with at least thirty (30) days' notice prior to the termination date, Squire will use commercially reasonable efforts to assist Enterprise Customer for no more than thirty (30) days after the termination date in order to provide access to Enterprise Customer's Client Data. After such thirty-day period, Squire shall have no obligation to retain or provide the Client Data to Enterprise Customer, except as required by applicable law.

- 10. We Determine Account Ownership:** We don't know the inner workings of your organization or the nature of your relationships. You agree that you will not request access to or information about any other Enterprise Customer's Squire Platform Account, and you will resolve any account-related disputes not caused by Squire directly with the other party. If we are unable to reasonably determine which individual has authority to act as the Primary Enterprise Contact on behalf of Enterprise Customer, we will require you to resolve the matter through proper channels outside of Squire. When such a dispute is identified, we may at our sole discretion, and without any liability for doing so, (i) take instruction from any individual designated as Primary Enterprise Contact; or (ii) suspend any Squire Platform Account associated with the dispute, including disabling login and instruction capabilities.
- 11. You Can Always Contact Us:** If you have an inquiry regarding the Squire Platform or any of the Squire Services, please contact us at support@getsquire.com. Note, we may provide support through our Third-Party Providers.

III. THIRD PARTY PROVIDERS

- 1. We May Use Third-Party Providers to Deliver Certain of the Squire Services:** Certain functionality or features available through or in connection with the Squire Services may be provided by Third-Party Providers, and you may be required to enter into Third-Party Terms with such Third-Party Providers to enable the functionality or access such features. In these cases, we will refer to such functionality and features as "**Third-Party Services**." In particular, you will be required to enter into a payment processing agreement with the applicable Payment Processor who will provide the Payment Processing Services to process Transactions through the Squire Platform. See Section V(c) on Payment Processing Services for more information.
- 2. You Must Agree to Third-Party Terms:** Although the Squire Services include Third-Party Services, Third-Party Services are performed exclusively by Third-Party Providers. In the event of any conflict, the applicable Third-Party Terms will control over this Agreement solely with respect to the applicable Third-Party Services. Your use of the Third-Party Services shall be subject to (and you agree to be bound by) such Third-Party Terms as they may be modified from time to time by the Third-Party Provider. You acknowledge and agree that Squire has no control over, and assumes no responsibility for, the content, accuracy, privacy policies, or practices of or opinions expressed in any third-party website or Third-Party Services or by any third party you may interact with through the Squire Services. **USE OF THE THIRD-PARTY SERVICES IS AT YOUR OWN RISK. BY USING THE SQUIRE SERVICES, YOU RELEASE AND HOLD US HARMLESS FROM ANY AND ALL LIABILITY ARISING FROM YOUR USE OF ANY THIRD-PARTY SERVICES OR OTHER INTERACTIONS WITH THIRD-PARTY PROVIDERS.** Similarly, you acknowledge that the Third-Party Providers do not endorse and are not responsible for the Squire Services.
- 3. You Give Us Permission to Share Information with Third-Party Providers:** You hereby authorize Squire to share any information you provide to us, including, but not limited to, Registration Data and Personal Information about Primary Customer

Contacts, Shop Users, and Enterprise Customers, with any Third-Party Provider, and you authorize each Third-Party Provider to share your information with us, as may be reasonably required for you to use and access the Squire Services. Corporate information which may be collected includes, but is not limited to: address, corporate organizational documents and certificates, federal employee identification number (EIN). Personal Information which may be collected includes, but is not limited to: name, address, phone number, date of birth, social security number or individual tax-payer identification number (ITIN), driver's license and/or passport. If you grant express permission to a Third-Party Provider to take specific actions on your behalf, or access particular information about your Squire Platform Account, either through your use of the applicable Third-Party Service, or through your Squire Platform Account, you acknowledge and agree that Squire may disclose the information about your Squire Platform Account that is specifically authorized by you, to such Third-Party Provider. You also acknowledge and agree that granting permission to a Third-Party Provider to take specific actions on your behalf does not relieve you of any of your responsibilities under these Enterprise Terms. These specific authorizations are in addition to any collection and use of any information described in the [Privacy Policy](#).

4. **We Can Change Third-Party Providers:** Squire has the right to terminate or amend its agreements with any of its Third-Party Providers or replace any existing Third-Party Provider currently providing Third-Party Services with a different Third-Party Provider, at any time, in Squire's sole discretion. Such actions by Squire may cause you or require you to terminate any existing agreements or accounts with Third-Party Providers created in connection with use of the Squire Services. You agree to cooperate with Squire and the applicable Third-Party Providers impacted to either onboard or offboard as reasonably required to ensure continuation of your access to the Squire Services.

IV. SQUIRE PLATFORM SUBSCRIPTION FEES; PAYMENT

1. **You Must Pay Subscription Fees for Access to the Squire Platform:** Access to your Squire Platform Account is contingent upon your timely payment and Squire's receipt of your Subscription Fees. You can find the amount of your Subscription Fees and when they are due on your Order Form. If there is no Order Form, the Subscription Fees stated on our Websites apply.
2. **We May Make Changes to Your Subscription Fees and Subscription Package:** We agree to honor the Subscription Fees stated in your applicable Order Form for the Initial Term stated on the Order Form; provided, however, we may make changes to or discontinue certain of the Squire Services offered under a particular package. During any Renewal Term, we reserve the right to (i) either increase or decrease the amount of your Subscription Fees, (ii) make changes to or discontinue any Subscription Package, (iii) change the prices for Squire Services not elected on the Order Form, and (iv) convert any previously free, trial or beta offering of the Squire Services to a paid service subject to Subscription Fees.
3. **You Must Provide a Valid Payment Method / Authorization:** During the signup process, you will provide us with valid payment information (e.g. debit, credit, ACH - or

such payment method as may be requested and accepted from time to time by Squire) (your “**Payment Method**”) to facilitate payment of your Subscription Fees. You represent and warrant that any Payment Method associated with your Squire Platform Account is a commercial-purpose Payment Method and not a card or other type of account issued for personal, family, or household purposes. You hereby authorize us to charge your Payment Method for any amounts owed to Squire, including Subscription Fees, Platform Fees, and any Transaction Losses (defined below), and to process these payments using the valid Payment Method you have supplied. You will update or replace the information for any Payment Method that expires with information for a valid one. If your Payment Method is automatically replaced with a new Payment Method by a payment processor, you acknowledge and agree that we are authorized to deduct any charges recorded by us on your Squire Platform Account against the Payment Method. You represent and warrant the Primary Enterprise Contact is authorized to use your Payment Method, and that any and all charges that may be billed to that Payment Method will not be rejected. If we are unable to process your Payment Method for any reason, we will give you notice via email or in-app and reserve the right to suspend or terminate your Squire Platform Account. All Subscription Fees must be paid in US Dollars or otherwise in the currency specified on the Order Form.

4. **You Must Pay Us On Time.** Your Subscription Fees are payable in advance. Unless otherwise specified on the Order Form, Subscription Fees are due monthly starting on the commencement date of the Subscription Term and due on the monthly anniversary date in each month thereafter for the length of the Subscription Term (the “**Due Date**”). If payment of your Subscription Fees is not received within five (5) business days after the Due Date, we reserve the right to impose interest on any such outstanding amounts at the lesser of (i) 1.25% of the outstanding balance per month, or (ii) the maximum interest permitted by applicable law, whichever is less, plus collection costs. If your Squire Platform Account is more than thirty (30) days past due, we may either terminate or suspend your access to the Squire Platform and Squire Services, in our sole discretion.
5. **Subscription Fees are Non-Cancellable and Non-Refundable:** YOU ARE RESPONSIBLE FOR ALL SUBSCRIPTION FEES FOR THE ENTIRE SUBSCRIPTION TERM (INCLUDING THE INITIAL TERM AND ANY RENEWAL TERM). Any cancellation or termination of any Order Form or of your Squire Platform Account does not absolve you from any of your payment obligations under this Agreement or any Order Form. All Subscription Fees paid are non-cancellable and non-refundable. Notwithstanding the above, if we terminate your Squire Platform Account without cause, we will refund you for a prorated portion of any prepaid amounts we received from you. Note, you won’t be entitled to a refund from us under any other circumstances.
6. **You are Responsible for Taxes:** You agree to pay (i) all sales, use, excise, value added, and any other taxes which Enterprise Customer is required to pay to any governmental authority (and, at Squire’s request, provide evidence of such payment) and (ii) all sales, use, excise, value added, and any other taxes attributable to this Agreement and any Order Form. You are responsible for seeking your own independent tax advice with respect to the tax treatment for any payments due to Squire under this Agreement and any Order Form.

V. SQUIRE SERVICES

Squire offers a variety of functions and features as part of the Squire Services. Additional terms, including Third-Party Terms, may apply.

1. **Software: Squire Commander®:** Squire's proprietary software, Squire Commander®, is the platform through which most of the Squire Services may be accessed. Squire Commander® provides a variety of features and functionality, including but not limited to, appointment booking, client management, staff management, marketing and point-of-sale. The features and functionality available to you are determined by the Subscription Package purchased on the Order Form. For the most updated list of available Subscription Packages and the features and functionality bundled in each, please visit our Website, www.getsquire.com.
2. **Hardware:** Along with Squire Commander®, you may be provided with certain Hardware as set forth on the Order Form. Hardware may include, but is not limited to, physical chip card readers, electronic mobile vendor payment devices, electronic tablet devices and cash registers. All Hardware is provided by a Third-Party Provider. Upon purchase, acceptance, or use of any Hardware, you agree to be bound by the Third-Party Terms applicable to such Hardware.
3. **Payment Processing Services:** The Squire Services include access to Payment Processing Services.
 - i. General. If approved by Squire and Payment Processor, in their respective discretions, you may receive access to the Payment Processing Services performed by our Payment Processor. To use the Payment Processing Services, you will be required to agree to the Stripe Services Agreement and Stripe Connected Account Agreement (the “**Processor Terms**”):

For U.S. Shop Users:

[Stripe Services Agreement – U.S.](#)

[Stripe Connected Account Agreement – U.S.](#)

For UK Shop Users:

[Stripe Services Agreement – UK](#)

[Stripe Connected Account Agreement - UK](#)

For Canada Shop Users:

[Stripe Services Agreement - Canada](#)

[Striped Connected Account Agreement - Canada](#)

For purposes of the Processor Terms, Squire is your “Stripe Connect Platform,” you are a “Connected Account” and “Platform User,” and Transactions are processed by Payment Processor through your “Stripe Account.”

1.
 - ii. **Squire Authorization.** If approved for the Payment Processing Services, you

authorize Squire, as your Stripe Connect Platform, to (i) request that Payment Processor generate a Stripe Account for you and to provide such information about you as Payment Processor may require in approving and generating your Stripe Account, which may include information about your Linked Accounts and Personal Information about your owners, officers, and Shop Users; (ii) submit payment and Transaction information to Payment Processor on your behalf to facilitate the processing of your Transactions, the transfer of funds to or from your Stripe Account or Linked Account according to your instructions and Squire Platform Account configuration, and the resolution of any Chargebacks or other processing issues; and (iii) receive information related to your use of the Payment Processing Services from Payment Processor.

iii. **Settlement.** You acknowledge and agree that (i) Payment Processor is responsible for settling your Transactions and transferring funds to your Linked Account; (ii) apart from submitting payment and Transaction information to Payment Processor on your behalf, based on your instructions and Squire Platform Account configuration, Squire is not responsible for the process of settling Transaction funds to your Linked Account; (iii) Squire is not a bank, money transmitter, or other type of financial institution and is not engaged in the business of receiving funds for transmission as part of the Squire Services or Payment Processing Services; (iv) during the course of processing your Transactions, your settlement funds may be received, held, and transferred by Payment Processor or its acquiring bank, including through a pooled funds account for your benefit and the benefit of other Payment Processor merchant clients; and (v) Squire does not own or control your Stripe Account or any other accounts used by Payment Processor or its acquiring bank to receive, hold, or transfer settlement funds. In the event that Squire is deemed to have received settlement funds (actually or constructively) for your Transactions, you agree that (A) in receiving the settlement funds and remitting them to you, Squire is acting as your authorized commercial agent (and not the agent of the Client) for the limited purpose of negotiating, concluding and facilitating the sale of your services under each Client Contract; (B) receipt of the funds by Squire as your agent constitutes your receipt of such funds and satisfies your customer's obligation to you in the amount of such funds; and (C) you shall have recourse only against Squire, and not against the customer, for any customer payment that Squire receives and fails to remit to you. You acknowledge that Squire is not a party to any Client Contract nor obliged to provide any services under any Client Contracts.

iv. **Payments to Squire:** You authorize Squire to instruct Payment Processor to deduct (i) Subscription Fees (in the event your Payment Method is no longer valid); (ii) Platform Fees; and (ii) any other amounts owed to Squire, including for any expenses Squire incurs related to any tax receipts, identity theft, Chargebacks, fraudulent charges, refunds, or returns (“**Transaction Losses**”) on your Transactions, from the settlement funds for each Transaction completed using the Payment Processing Services and to settle those amounts to Squire. Please reference your Order Form for confirmation of Subscription Fees and Platform Fees.

v. **We are Not Liable For Transaction Losses:** Squire is not liable for Transaction Losses. By using the Squire Services, you hereby release Squire from any liability arising from Transaction Losses. If Squire incurs any loss or liability relating to Transaction Losses, you are responsible for reimbursing Squire and remain liable for all Transaction Losses incurred by you until you have made Squire whole. You will also use best efforts to promptly notify Squire of any Transaction Losses that may affect the Squire Platform or Squire Services. Squire reserves the right, in its sole discretion, to terminate any Squire Platform Account that causes, or enables any other third-party to cause, Transaction Losses.

vi. **Transactions are Performed on behalf of Enterprise Customer:** All Transactions processed with Payment Processor via the Squire Platform are Transactions of Enterprise Customer. Squire will only direct Payment Processor to make disbursements to a Shop User's Linked Account from the settlement proceeds of Transactions ("Disbursements") at the direction of and on behalf of Enterprise Customer. The primary merchant descriptor or billing descriptor for each Transaction as it may appear on a Client's bank or credit card statement will be the name of Enterprise Customer. Any disputes as it relates to the quantity and the amount of Disbursements between a Shop User and Enterprise Customer are solely between Shop User and Enterprise Customer.

d. **Partner Offers:** From time to time, Squire may partner with third-parties ("Partners"), which may be Third-Party Providers, to give you access to goods and services from such Partner ("Partner Marketed Services") that as a Squire Enterprise Customer, we think you may be interested in to help run your business (each, a "Partner Offer"). You expressly acknowledge and agree that (i) Squire may market to you Partner Offers to give you access to Partner Marketed Services, (ii) Squire makes no warranties, representations or undertakings relating to the Partner, Partner Offer, or the Partner Marketed Services, (iii) Squire disclaims all liability for any loss, damage, and any other consequence resulting directly or indirectly from or relating to your access to the Partner Offer or the Partner Marketed Services, and (iv) Squire does not control the privacy practices of any Partner or their websites and, thus, Squire's Privacy Policy does not apply to any collection of Personal Information by Partner. If at any time a particular Partner Offer does not interest you, please reach out to support@getsquire.com to opt-out of receiving messages about that particular Partner Offer.

e. **Social Media Integration:** In certain instances, Squire allows you to integrate certain Squire Services with your social media accounts (e.g. Facebook, Instagram, Google Business) and other third party websites ("Social Media Platforms") to enable you to reach your Clients. By choosing to integrate the Squire Services with any Social Media Platform, you hereby give us permission to share certain information, including Personal Information, with such Social Media Platform, to the extent necessary to complete the integration (please refer to our [Privacy Policy](#) for more information). Nevertheless, Squire is not responsible for the acts or omissions of any Social Media Platform, including its behavior, agencies, linked websites, applications, products, or services.

Your use of any Social Media Platform to integrate with the Squire Services, and rights with respect to such Social Media Platform are solely between you and the applicable Social Media Platform. We are not responsible for the privacy, security or integrity of any Social Media Platform or the practices and policies of any Social Media Platform. We make no warranties of any kind and assume no liability of any kind for your use of any Social Media Platform.

f. Messaging Clients: Certain features of the Squire Services have the functionality within Squire Commander® to allow you to send messages and updates via e-mail, text message, or push notification to either an individual or a customized group of your Clients (“**Messaging Features**”). When a Client books an appointment using the Squire Platform and enters their e-mail and/or mobile phone number, the Client is made aware and consents to the fact that Squire may send automated e-mail and/or text messages to the Client about the appointment and purchases made as part of the transaction (“**Transactional Messages**”). In the event you, your Affiliates or your Shop Users use any of the Messaging Features to send non-Squire generated Transactional Messages or messages unrelated to a particular transaction (“**Marketing Messages**”), you are responsible for ensuring you have obtained the requisite level of consent from each Client receiving such message as necessary to comply with applicable law. Any Transactional Messages or Marketing Messages originated by you and your use of the Messaging Features are subject to these Enterprise Terms and the [Privacy Policy](#).

g. Loyalty/Membership Programs/Gift Cards: You may use the Squire Platform to facilitate, market and sell loyalty or membership programs or gift cards to your Clients. If you offer a loyalty or membership program or gift cards to your Clients, you understand and agree that you (and not Squire) are responsible for ensuring that your program and any associated rewards are compliant with applicable federal and state laws, including laws governing prepaid services and special offers such as rebates and coupons and for any disputes or related issues. You represent and warrant that any loyalty or membership program or gift cards offered to Clients through the Squire Platform shall comply with all applicable laws and that each Client will be presented with all required terms and conditions and cancellation policy applicable to such program or gift card.

h. Enterprise-Branded App: Should you choose to order an Enterprise-Branded App as part of the Squire Services, the terms of the [Squire Enterprise-Branded Application Agreement](#) apply and hereby are incorporated by reference. By ordering and using any Enterprise-Branded App, you agree to be bound by the Squire Enterprise Branded Application Agreement.

- 2.
3. i. **We Can Make Changes to the Squire Services:** We reserve the right to change, suspend or discontinue any aspect of the Squire Services at any time, including hours of operation or availability of the Squire Services or any Squire Services feature, without notice and without liability. We also reserve the right to impose limits on certain Squire Services features or restrict access to some or all of the Squire Services in our sole

discretion, without notice and without liability. Without limiting the foregoing, you acknowledge that the operation of the Squire Platform and Squire Services may from time to time encounter technical or other problems and may not necessarily continue uninterrupted or without technical or other errors and Squire shall not be responsible to you or others for any such interruptions, errors or problems or an outright discontinuance of the Squire Services. Squire has no obligation to maintain or update the Squire Platform or the Squire Services or to continue producing or releasing new versions of the Squire Platform or the Squire Services.

VI. ADD-ON SERVICES

If enabled for your Squire Platform Account, you may access the following additional Squire Services (“**Add-On Services**”), subject to this Agreement, including the following additional terms and conditions. You agree to pay the Subscription Fees, Platform Fees and any other fees and expenses associated with your use of an Add-On Service, as set forth in the applicable Order Form.

1. **Transaction Management Services:** In connection with the Squire Transaction Management Services (“**Transaction Management Services**”), Squire will provide Payment Processor with the information needed to automate Disbursements to your Shop Users. Consistent with the Enterprise Terms of Service, if Squire Transaction Management Services are enabled on your Squire Platform Account, you authorize Squire to submit payment and Transaction information to Payment Processor on your behalf to facilitate Payment Processor’s settlement of Disbursements to your Shop Users according to your instructions and Squire Platform Account configuration as follows:

SQUIRE Tip Splits: If you use SQUIRE Tip Splits (“**Tip Splits**”), Squire will provide information to the Payment Processor for the settlement of the portion of Transaction funds designated as a “tip” directly into the Linked Account of the Shop User who initiated the Transaction, subject to Platform Fees as specified on the applicable Order Form. Primary Enterprise Contact may designate from where the applicable Platform Fees associated with Tip Splits are deducted (i.e. from the “tip” prior to settlement in the Shop User’s Linked Account or from Enterprise Customer’s Stripe Account).

SQUIRE Auto Payout: If you use SQUIRE Auto Payout (“**Auto Payout**”, formerly known as “*One Touch Payout*” or “*OTP*”), Squire will provide information to the Payment Processor for the settlement of (i) the portion of Transaction funds designated as a “tip” and (ii) a customizable percentage of the portion of Transaction funds charged in connection with the provision of goods and services (“**RevShare**”), directly into the Linked Account of the Shop User who initiated the Transaction, subject to Platform Fees as specified in the applicable Order Form. Primary Enterprise Contact may designate from where the applicable Platform Fees associated with Auto Payout are deducted (i.e. from the “tip” or RevShare prior to settlement in the Shop User’s Linked Account or from Enterprise Customer’s Stripe Account).

i. Enterprise Customer Eligibility: To be eligible to use any of the Squire Transaction Management Services, you must be a customer in good standing and be actively completing Transactions through the Squire Platform, in sufficient volume, for at least thirty (30) days, as determined by Squire in its sole discretion. Only the Primary Enterprise Contact has the authority to enable any of the Squire Transaction Management Services for the Enterprise Customer's Squire Platform Account. In no event may a Shop User enable Squire Transaction Management Services for an Enterprise Customer, unless such Shop User is the Primary Enterprise Contact for the Enterprise Customer.

ii. Shop User Eligibility: For any Shop User to be eligible to receive Disbursements through the Squire Transaction Management Services, each Shop User must (i) be associated with an Enterprise Customer that has been approved for Squire Transaction Management Services; (ii) be at least 18 years of age; (iii) not located in Cuba, Iran, North Korea, Syria, or any other territory that is subject to a U.S. government embargo, or that has been designated by the U.S. government as a "terrorist-supporting" country; (iv) not be listed on any U.S. government list of prohibited or restricted persons or the UK Sanctions List; (v) connect a Linked Account to their profile under your Squire Platform Account; and (vi) agree to the [SULA](#).

iii. Third-Party Terms: The Squire Transaction Management Services are supported by Payment Processing Services performed by Payment Processor, consistent with the terms of Section V(c). If approved by Squire and Payment Processor, in their respective discretions, each Shop User will be required to agree to the Processor Terms. For purposes of the Processor Terms, Squire is the "Stripe Connect Platform," each Shop User will be a "Connected Account" and "Platform User," and payments are processed by Payment Processor through each Shop User's "Stripe Account."

iv. Disbursement Timing. Payment Processor aggregates Tip Splits and RevShare Disbursements throughout the day and you authorize Squire to provide the required information to Payment Processor to push Disbursements to a Shop User's Linked Account, on a recurring basis, subject to instructions provided by Enterprise Customer. Standard settlement times apply.

2. Squire Rapid Transfer. SQUIRE Rapid Transfer ("Rapid Transfer", formerly known as "*Instant Payout*") allows you to access settlement funds from your Transactions faster than standard payout times. If Rapid Transfer is enabled, you authorize Squire, on your behalf, to provide information to the Payment Processor to settle funds for your Transactions directly into your Linked Account on the Business Day that they are submitted for processing up, subject to the subsection VI(b)(iv) below. Each Rapid Transfer Disbursement are subject to the Platform Fees designated on the applicable Order Form (or as otherwise described at the time Rapid Transfer is enabled).

i. Enterprise Customer Eligibility. To be eligible for Rapid Transfer, you must be a

customer in good standing and be actively completing Transactions through the Squire Platform, in sufficient volume, for at least thirty (30) days, as determined by Squire in its sole discretion.

ii. Shop User Eligibility. To be eligible for Rapid Transfer, a Shop User must meet the eligibility criteria for Squire Transaction Management Services. Each Shop User may determine whether to enable Rapid Transfer for Disbursements to the Shop User's own Linked Account and a Shop User does not require approval from the Primary Enterprise Contact to enable Rapid Transfer for Disbursements.

iii. Third-Party Terms: Rapid Transfer is an add-on service supported by the Payment Processing Services performed by Payment Processor, consistent with the terms of Section V(c).

iv. Disbursement Timing: The Payment Processor will aggregate Rapid Transfer Disbursements from settled funds from Transactions not assigned to a particular Shop User or as otherwise designated by Enterprise Customer, and you authorize Squire to provide the required information to Payment Processor to push Disbursements directly into Enterprise Customer's Linked Account on the Business Day that the Transactions are submitted for processing, with a cut off time of 9pm local time. Disbursements are made up to three (3) times per day, subject to processing delays out of the control of Squire, including but not limited to, (x) you submitting Transactions after 9pm local time; (y) applicable rules and regulations from your bank and/or credit union; and (z) changes made to your Enterprise Customer Squire Platform Account's Linked Account information. Once Rapid Transfer is enabled, the Disbursements are recurring in addition to the Platform Fees assessed with each Disbursement until you disable Rapid Transfer.

3. **Squire Rent Collect.** If your business is set up as a "rental shop", SQUIRE Rent Collect ("Rent Collect") allows you to collect booth rental payments ("Booth Rent") from Shop Users who have uploaded a verified Payment Method to your Squire Platform Account. With Rent Collect enabled, you authorize Squire to direct Payment Processor to charge the applicable Shop User's Payment Method on file the amounts designated by you for Booth Rent on a recurring basis, subject to instructions provided by Enterprise Customer. By enabling Rent Collect, you hereby represent and warrant that you have obtained all prior and necessary authorization from Shop User to charge Booth Rent, if any, against Shop User's Payment Method and to process the Booth Rent payments using the valid Payment Method that Shop User supplied. The Platform Fees, as designated on the applicable Order Form, will be deducted directly from each payment of Booth Rent so that funds from the Transaction are settled into Enterprise Customer's Linked Account net of the Platform Fees.

VII. LICENSES; INTELLECTUAL PROPERTY

- 1. Squire's IP; Squire's License to You:** All content included in or made available through the Squire Platform or any Squire Services including all text, graphics, logos, button icons, images, audio clips, digital downloads, data compilations, Websites, and Applications (collectively, the “**Squire IP**”) is the property of Squire or its Affiliates, or its content providers; protected by United States and international copyright laws; and Squire owns all right, title and interest therein. Subject to the terms and conditions of this Agreement, Squire hereby grants you a limited, non-exclusive, non-transferable, non-sublicensable, revocable license to use and access the Squire Platform, Squire Services and Squire IP as specified on the applicable Order Form during the Subscription Term for the sole purpose of lawfully operating your business. You agree you will not copy, transmit, distribute, sell, license, reverse engineer, modify, publish, or participate in the transfer or sale of, create derivative works from, or in any other way exploit any of the Squire Platform, Squire Services or Squire IP, in any manner not expressly permitted by this Agreement.
- 2. Enterprise Customer IP; Your License to Us: Use of the Squire Platform and Squire Services may require you to provide Squire access to certain content, including, but not limited to business name, trademarks, text, graphics, photographs (including image and likeness of individuals), logos, button icons, images, audio clips, digital downloads, data (including any personal information), data compilations, Client Data, applications and websites (collectively, “Enterprise Customer IP”). You hereby grant Squire and its Affiliates, a worldwide, perpetual, irrevocable, transferable, sublicensable, royalty-free license to (i) use the Enterprise Customer IP to display, exhibit, transmit, broadcast, reproduce, record, photograph, digitize, as well as modify, alter, edit, adapt create derivative works, license, or otherwise only as necessary to provide the Squire Services to you and/or as otherwise permitted by this Agreement and (ii) for Squire’s marketing and promotional purposes. You represent and warrant that: (i) Enterprise Customer owns or has otherwise obtained all necessary consents, rights, releases, and permissions (including from your Shop Users and Affiliates) to submit all Enterprise Customer IP to Squire and to grant the rights granted to Squire in this Agreement and (ii) the Enterprise Customer IP and its submission and use as you authorize in this Agreement will not violate (1) any applicable law, (2) any third-party intellectual property, privacy, publicity, or other rights, or (3) any of your or third-party policies or terms governing your Enterprise Customer IP. Other than the rights expressly granted in this Agreement, Squire shall have no other rights with respect to the Enterprise Customer IP and Enterprise Customer shall retain all right, title and interest therein.**
- 3. Feedback; Your License to Us:** You may provide or we may ask you to provide suggestions, comments, input or other feedback (“**Feedback**”) regarding the Squire Platform and Squire Services. If you provide us with any Feedback, then you grant us a worldwide, perpetual, irrevocable, transferable, sublicensable, royalty-free license to use, reproduce, publicly display, distribute, modify, and publicly perform the Feedback as we see fit. Any Feedback you choose to provide is given entirely voluntarily. You understand that you will not receive any compensation for your Feedback, and that we

may use any Feedback you provide to improve the Squire Platform and Squire Services or to develop new features and services.

VIII. RESTRICTED ACTIVITIES; FRAUD; UNAUTHORIZED TRANSACTIONS

1. **Restricted Activities:** During the term of this Agreement, in connection with your use of the Squire Platform and Squire Services, you will not engage in any of the following (collectively, “**Restricted Activities**”):
 - i. Breach these Enterprise Terms, or any other agreement or policy that you have agreed to with Squire, a Third-Party Provider, or other third party;
 - ii. Violate any law, statute, ordinance, or regulation;
 - iii. Use the Squire Services in connection with any Transactions to purchase or sell, or to facilitate the purchase or sale of, illegal goods or services or any goods or services prohibited by the payment networks or Third-Party Providers, including, but not limited to: unlawful sexually oriented materials or services, counterfeit products, unlawful gambling activities, fraud, money laundering, the funding of terrorist organizations, or the unlawful purchase or sale of tobacco, firearms, prescription drugs, or other controlled substances;
 - iv. Infringe Squire’s or any third party’s copyright, patent, trademark, trade secret or other intellectual property rights, or rights of publicity or privacy;
 - v. Send spam (via email, phone or text);
 - vi. Use purchased, rented, or third-party Contact Lists;
 - vii. Act in a manner that is defamatory, libelous, threatening or harassing to the Squire Parties;
 - viii. Provide false, inaccurate or misleading information;
 - ix. Engage in debt-collection activities;
 - x. Instruct the Payment Processor to send or receive what we or it reasonably believes to be potentially fraudulent funds on your behalf;
 - xi. Refuse to cooperate in an investigation or refuse to provide confirmation of your identity or any information you provide to us;
 - xii. Attempt to “double-dip” during the course of a Dispute, Chargeback, reversal or other investigation, with “double-dipping” being defined as intentionally or knowingly receiving

or intentionally or knowingly attempting to receive funds from both the Payment Processor and another payment processor, financial institution or merchant for the same Transaction;

xiii. Control a Squire Platform Account that is linked to another Squire Platform Account that has engaged in any of these Restricted Activities;

xiv. Conduct your business or use the Squire Services in a manner that in Squire's or the Payment Processor's judgment is likely to result in or may result in complaints, Disputes, Chargebacks, reversals, fees, fines, penalties or other liability to Squire, other third parties or you;

xv. Engage in "refund abuse" in connection with the use of the Squire Services, including without limitation, abusive or fraudulent returning of Hardware.

xvi. Engage in any Transaction that the Payment Processor, Squire, Visa, MasterCard, Discover, American Express or any other electronic funds transfer network reasonably believes to be an abuse of the card system or a violation of card association or network rules;

xvii. Allow your Squire Platform Account to have a negative balance;

xviii. Take any action that imposes an unreasonable or disproportionately large load on our infrastructure (including, without limitation, through the use of any APIs that we may provide); perform penetration testing, facilitate any viruses, Trojan horses, worms or other computer programming routines that may damage, detrimentally interfere with, surreptitiously intercept or expropriate any system, data or information; use an anonymizing proxy; use any network monitoring or discovery software, use any robot, spider, other automatic device, or manual process to determine architecture, monitor or copy the Squire Websites, Applications or overall Squire Platform without our prior written permission; or interfere or attempt to interfere with the Squire Services;

xix. Take any action that may cause us to lose any of the services from our Internet service providers, payment processors, or other suppliers;

xx. Circumvent any Squire policy or determinations about your Squire Platform Account such as temporary or indefinite suspensions or other Squire Platform Account holds, limitations or restrictions, including, but not limited to, engaging in the following actions: attempting to create new or additional Squire Platform Accounts when a Squire Platform Account has been restricted, suspended or otherwise limited; creating new or additional Squire Platform Accounts using information that is not your own (e.g. name, address, email address, etc.); or using someone else's Squire Platform Account;

xxi. Transfer or sell access to your Squire Platform Account or Account ID to any other

party;

xxii. Harass our employees, agents, other Squire Enterprise Customers, and or any consumer user of Squire's Websites or Applications;

xxiii. Use the Squire Services or Payment Processing Services for payroll purposes or to fund or remit payroll or payroll deposits;

xxiv. Decompile, reverse engineer, or otherwise attempt to obtain the source code or underlying ideas or information of or relating to the Services;

xxv. Violate the security of any computer network, or crack any passwords or security encryption codes;

xxvi. Use the Squire Services in a manner that we believe may be a violation of any applicable electronic payment network rules, card association or network rules, National Automated Clearing House Association rules or applicable law; or

xxvii. Cause or facilitate any third-party to engage in the Restricted Activities.

If your Squire Platform Account is used to conduct (or to attempt to conduct) Transactions that we believe are not permitted by these Enterprise Terms (such as one of the activities set forth above) or applicable law, we may, in our sole discretion, and without waiving any of our rights, freeze, close, suspend, terminate or limit your access to the Squire Services. We reserve the right to refuse to facilitate any Transaction, except as may be prohibited by applicable law.

2. **Monitoring:** Squire and its Third-Party Providers may monitor your Transactions for the purpose of identifying fraud or other illicit activity. Based on our monitoring, Squire may suspend your Squire Platform Account, or limit your use of the Squire Services, in its sole discretion to (i) mitigate the risk of fraud, unauthorized transactions, or Transaction Losses; (ii) prevent loss (including Transaction Losses) to Squire, you, a Third-Party Provider, or other third parties; (iii) prevent a breach of this Agreement; or (iv) to comply with applicable, Network Rules, or the direction or request of a regulatory or law enforcement agency. Without limiting the foregoing, in the event of (i) – (iv) above, you authorize Squire to instruct Payment Processor to withhold funds for your Transactions to mitigate the risk of Chargebacks, Transaction Losses, or other losses. If you believe your Squire Platform Account has been opened or used in an unauthorized manner in connection with a Transaction, please contact us immediately at support@getsquire.com.
3. **Unauthorized Transactions:** If you become aware of any unauthorized charge or use occurring through your Squire Platform Account, you should contact Squire customer support at support@getsquire.com immediately. To the extent that the charge relates to Partner Marketed Services, you should contact the applicable Third-Party Provider as identified in the applicable Third-Party Terms. If Squire suspects unauthorized

Transactions, Squire reserves the right to suspend your use of the Squire Services, except as prohibited by applicable law.

IX. CONFIDENTIALITY

1. “**Confidential Information**” means any information or data, regardless of whether it is in tangible form, disclosed by either party (“**Disclosing Party**”) to the other party (“**Receiving Party**”) that is marked or otherwise designated as confidential or proprietary or that should otherwise be reasonably understood to be confidential given the nature of the information and the circumstances surrounding disclosure, including, without limitation, Client Data, pricing, concepts, processes, plans, designs and other strategies, “know how”, financial, and other business and/or technical information and materials of Disclosing Party and its affiliates. Confidential Information does not include any information which: (i) is publicly available through no breach of the Agreement or fault of Receiving Party; (ii) was properly known by Receiving Party, and to its knowledge, without any restriction, prior to disclosure by Disclosing Party; (iii) was properly disclosed to Receiving Party, and to its knowledge, without any restriction, by another person without breach of Disclosing Party’s rights; or (iv) is independently developed by Receiving Party without use of or reference to the Confidential Information of Disclosing Party.
2. Except as otherwise authorized by Disclosing Party in writing, Receiving Party will not (i) use any Confidential Information of Disclosing Party for any purpose outside of exercising Receiving Party’s rights or fulfilling its obligations under these Terms and (ii) disclose or make Confidential Information of Disclosing Party available to any party, except to its, its Affiliates’, and their respective employees, legal counsel, accountants, contractors, and in our case, subcontractors (collectively, “**Representatives**”) who have a “need to know” as necessary for Receiving Party to exercise its rights or fulfill its obligations under these Terms. Receiving Party is responsible for its Representatives’ compliance with this Section. Representatives will be legally bound to protect Confidential Information of Disclosing Party under terms of confidentiality that are at least as protective as the terms of this Section. Receiving Party will protect the confidentiality of Confidential Information of Disclosing Party using the same degree of care that it uses to protect the confidentiality of its own confidential information but in no event less than reasonable care.
3. Either party may disclose the confidential information it got from the other party if required by a law, regulation, subpoena, or a court order, if the parties fulfill certain conditions, such as providing notice (if legally allowed) and reasonable cooperation. Receiving Party may disclose Confidential Information of Disclosing Party if so required pursuant to a regulation, law, subpoena, or court order (collectively, “**Compelled Disclosures**”), provided Receiving Party gives Disclosing Party notice of a Compelled Disclosure (to the extent legally permitted). Receiving Party will provide reasonable cooperation to Disclosing Party in connection with a Compelled Disclosure at Disclosing Party’s sole expense.

X. APP DISTRIBUTION PLATFORM DISCLAIMER

If you download any Squire Applications through the Apple App Store, Google Play or other app store or distribution platform (“**App Distribution Platform**”), you acknowledge and agree that: (i) these Enterprise Terms are between us, and not with the App Distribution Platform, and that we are responsible for the Applications and Squire Service, not the App Distribution Platform; (ii) the App Distribution Platform has no obligation to furnish maintenance and support services or handle any warranty claims; (iii) the App Distribution Platform is not responsible for addressing any claims you or any third party have relating to the Application; and (iv) the App Distribution Platform is a third party beneficiary of these Enterprise Terms as related to your use of the Application, and the App Distribution Platform will have the right to enforce these Enterprise Terms as related to your use of the Application against you.

XI. WARRANTIES & DISCLAIMERS

1. **Hardware Limited Warranty:** If during the first ninety (90) days after the date you receive a piece of Hardware from Squire, the Hardware fails to operate as described under the Third-Party Terms, Squire will replace your Hardware with substantially similar, new or refurbished, device (based on availability and in Squire's sole discretion), provided that the Hardware's failure to operate was not due to any actions caused by you, your Affiliates, your Shop Users, your Clients or any other third parties (other than the Third-Party Provider). Should you wish to return any piece of Hardware and seek a refund for its purchase, you may do so within thirty (30) days of the date you received the Hardware. Once we are in receipt of the returned Hardware, we will assess the Hardware for damage to determine if you are eligible for a refund of the applicable Hardware fees charged to your Payment Method. In some instances, a restocking fee may be assessed against any refund payment.
2. **CLIENT DISCLAIMER:** Squire does not have control over the acts or omissions of your Clients. Squire does not and is not responsible for screening Clients or verifying any information about Clients. Squire does not assume any responsibility for the accuracy or reliability of any information provided by your Clients on or through the Squire Platform.
YOU ARE RESPONSIBLE FOR YOUR INTERACTIONS WITH YOUR CLIENTS THROUGH THE SQUIRE PLATFORM.
3. **TAXES DISCLAIMER:** Squire is not responsible for any taxes that may apply to the goods and services you provide to your Clients and the payments you make or receive. Squire is not responsible for determining whether taxes apply to your Transactions. Squire is not responsible for the collection, reporting and remittance of the correct taxes arising from any Transaction. **YOU ARE RESPONSIBLE FOR ANY TAXES THAT MAY APPLY TO THE GOODS AND SERVICES YOU PROVIDE TO YOUR CLIENTS AND THE PAYMENTS YOU MAKE OR RECEIVE. YOU ARE RESPONSIBLE FOR DETERMINING WHETHER TAXES APPLY TO YOUR TRANSACTIONS. YOU ARE RESPONSIBLE FOR THE COLLECTION, REPORTING AND REMITTANCE OF THE CORRECT TAXES ARISING FROM ANY TRANSACTION TO THE APPROPRIATE TAX AUTHORITY.** YOU HEREBY AGREE TO COMPLY WITH ANY AND ALL APPLICABLE

TAX LAWS IN CONNECTION WITH YOUR USE OF THE SQUIRE SERVICES, INCLUDING WITHOUT LIMITATION, THE REPORTING AND PAYMENT OF ANY TAXES ARISING IN CONNECTION WITH TRANSACTIONS MADE THROUGH THE SQUIRE SERVICES (INCLUDING THE PAYMENT PROCESSING SERVICES), IF ANY.

4. **LOCATION DATA DISCLAIMER:** LOCATION DATA PROVIDED BY THE SQUIRE PLATFORM IS FOR BASIC LOCATION PURPOSES ONLY AND IS NOT INTENDED TO BE RELIED UPON IN SITUATIONS WHERE PRECISE LOCATION INFORMATION IS NEEDED OR WHERE ERRONEOUS, INACCURATE OR INCOMPLETE LOCATION DATA MAY LEAD TO DEATH, PERSONAL INJURY, PROPERTY OR ENVIRONMENTAL DAMAGE. NEITHER SQUIRE, NOR ANY OF ITS CONTENT PROVIDERS, GUARANTEES THE AVAILABILITY, ACCURACY, COMPLETENESS, RELIABILITY, OR TIMELINESS OF LOCATION DATA DISPLAYED BY THE SQUIRE PLATFORM. ANY OF YOUR INFORMATION, INCLUDING GEOLOCATIONAL DATA, YOU UPLOAD, PROVIDE, OR POST ON THE SQUIRE PLATFORM MAY BE ACCESSIBLE TO SQUIRE AND CERTAIN USERS OF THE SQUIRE PLATFORM.
5. **NO WARRANTY; DISCLAIMER:** EXCEPT AS EXPRESSLY PROVIDED HEREIN, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, THE SQUIRE PLATFORM AND THE SQUIRE SERVICES ARE PROVIDED "AS IS," "AS AVAILABLE" AND WITHOUT ANY REPRESENTATION OR WARRANTY, WHETHER EXPRESS, IMPLIED, OR STATUTORY. SQUIRE AND ITS AFFILIATES, DIRECTORS, OFFICERS, EMPLOYEES, AGENTS, PARTNERS, SUPPLIERS AND LICENSORS (COLLECTIVELY, THE "**SQUIRE PARTIES**"), MAKE NO REPRESENTATION OR WARRANTY OF ANY KIND WHATSOEVER FOR THE SQUIRE PLATFORM, SQUIRE SERVICES OR THE CONTENT, MATERIALS, INFORMATION AND FUNCTIONS USED OR MADE ACCESSIBLE BY THE SQUIRE PLATFORM AND SQUIRE SERVICES OR FOR ANY BREACH OF SECURITY ASSOCIATED WITH THE TRANSMISSION OF SENSITIVE INFORMATION THROUGH THE SQUIRE PLATFORM AND SQUIRE SERVICES. THE SQUIRE PARTIES DO NOT WARRANT THAT THE FUNCTIONS CONTAINED IN THE SQUIRE PLATFORM AND SQUIRE SERVICES WILL BE SECURE, TIMELY, UNINTERRUPTED OR ERROR FREE OR THAT THE SQUIRE PLATFORM AND SQUIRE SERVICES WILL REMAIN UPDATED, COMPLETE OR CORRECT, OR THAT THE SERVICES WILL MEET YOUR REQUIREMENTS OR THAT THE SYSTEMS THAT MAKE THE SQUIRE PLATFORM AND SQUIRE SERVICES AVAILABLE (INCLUDING WITHOUT LIMITATION THE INTERNET, OTHER TRANSMISSION NETWORKS, AND YOUR LOCAL NETWORK AND EQUIPMENT) WILL BE UNINTERRUPTED OR FREE FROM VIRUSES OR OTHER HARMFUL COMPONENTS. THE SQUIRE PARTIES SHALL NOT BE RESPONSIBLE FOR ANY SERVICE INTERRUPTIONS, INCLUDING, BUT NOT LIMITED TO, SYSTEM FAILURES OR OTHER INTERRUPTIONS THAT MAY AFFECT THE RECEIPT, PROCESSING, ACCEPTANCE, COMPLETION OR SETTLEMENT OF PAYMENT TRANSACTIONS OR THE SQUIRE SERVICES. THE SQUIRE PARTIES SPECIFICALLY DISCLAIM ANY IMPLIED WARRANTIES OF TITLE, MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT.

XII. INDEMNIFICATION

You agree to defend, indemnify and hold harmless Squire, the Squire Parties, and any applicable Third-Party Providers from and against any and all claims, damages, obligations, losses, liabilities, costs, debt and expenses (including but not limited to attorney's fees) arising from or relating to: (i) your breach of this Agreement, (ii) your or your Shop Users' or your employees' or agents' improper use of the Squire Platform, Squire Services or Third-Party Services, (iii) your or your Shop Users' or your employees' or agents' violation of any law, regulation, industry standard, or the rights of a third party (including, but not limited to, infringement of any intellectual property rights of third parties, and failure to obtain requisite consents under any privacy, data protection or consumer protection law), (iv) Transactions, (v) content that you post or transmit, (vi) the goods and services you provide to your Clients, and (vii) any agreement between you and a third party. You further agree to hold the above parties harmless from losses arising out of actions taken or omitted in good faith by us in reliance upon instructions from you.

XIII. LIMITATION OF LIABILITY

TO THE FULLEST EXTENT PERMITTED BY LAW, IN NO EVENT SHALL SQUIRE, THE SQUIRE PARTIES AND/OR THE THIRD-PARTY PROVIDERS, BE LIABLE TO YOU OR ANYONE ELSE FOR ANY SPECIAL, INCIDENTAL, INDIRECT, CONSEQUENTIAL AND/OR PUNITIVE DAMAGES WHATSOEVER, INCLUDING THOSE RESULTING FROM LOSS OF USE, DATA AND/OR PROFITS, WHETHER OR NOT FORESEEABLE, REGARDLESS OF THE FORM OF ACTION, WHETHER IN CONTRACT, TORT (INCLUDING NEGLIGENCE), WARRANTY, STRICT LIABILITY, AND/OR ANY OTHER LEGAL OR EQUITABLE THEORY, EVEN IF SQUIRE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES IN ADVANCE.

ADDITIONALLY, TO THE FULLEST EXTENT PERMITTED BY LAW, IN NO EVENT SHALL SQUIRE, THE SQUIRE PARTIES AND/OR THE THIRD-PARTY PROVIDERS BE LIABLE FOR ANY DAMAGES WHATSOEVER, WHETHER DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL OR EXEMPLARY DAMAGES, INCLUDING, BUT NOT LIMITED TO, DAMAGES FOR BODILY INJURY OR EMOTIONAL DISTRESS AND DAMAGES FOR LOSS OF PROFITS, GOODWILL, USE, DATA OR OTHER INTANGIBLE LOSSES (EVEN IF SQUIRE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES), RESULTING FROM: (1) YOUR USE OF OR YOUR INABILITY TO USE THE SQUIRE PLATFORM OR THE SQUIRE SERVICES; (2) DELAYS OR DISRUPTIONS IN THE SQUIRE SERVICES (INCLUDING DELAYS IN FUNDING ACCOUNTS OR PAYMENT PROCESSING OR OTHERWISE FAILED TRANSACTIONS); (3) VIRUSES OR OTHER MALICIOUS SOFTWARE OBTAINED BY ACCESSING THE SQUIRE PLATFORM OR SQUIRE SERVICES; (4) GLITCHES, BUGS, ERRORS, OR INACCURACIES OF ANY KIND IN THE SQUIRE PLATFORM OR SQUIRE SERVICES; (5) THE CONTENT, ACTIONS, OR INACTIONS OF THIRD-PARTIES (INCLUDING WITHOUT LIMITATION THIRD-PARTY SERVICES); (6) A SUSPENSION OR OTHER ACTION TAKEN WITH RESPECT TO YOUR SQUIRE PLATFORM ACCOUNT; (7) YOUR NEED TO MODIFY PRACTICES, CONTENT, OR BEHAVIOR, OR YOUR LOSS OF OR INABILITY TO

DO BUSINESS, AS A RESULT OF CHANGES TO THESE ENTERPRISE TERMS OR SQUIRE'S POLICIES. SQUIRE RESERVES THE RIGHT TO MODIFY ITS POLICIES AND THESE ENTERPRISE TERMS AT ANY TIME CONSISTENT WITH THE PROVISIONS OUTLINED HEREIN.

TO THE FULLEST EXTENT PERMITTED BY LAW, SQUIRE'S MAXIMUM AGGREGATE LIABILITY TO YOU IN ANY CIRCUMSTANCE ARISING OUT OF AND/OR RELATING TO THE SQUIRE PLATFORM AND THE SQUIRE SERVICES OR THESE TERMS IS LIMITED TO THE LESSER OF THE SUBSCRIPTION FEES PAID BY YOU, IF ANY, IN THE TWELVE (12) MONTH PERIOD IMMEDIATELY PRECEDING THE DATE OF THE ACCRUAL OF LIABILITY OR ONE HUNDRED DOLLARS (US\$100.00).

XIV. EXPORT LAWS

Enterprise Customer acknowledges that the Squire Platform and Squire Services may be subject to applicable import and export laws and regulations of the Enterprise Customer's country and that of the United States, without limitation. Further, this Agreement may involve items and information that are subject to the International Traffic in Arms Regulations (ITAR) of the U.S. Department of State or Export Administration Regulations (EAR) of the U.S. Department of Commerce, Bureau of Industry and Security. Enterprise Customer shall at all times strictly comply with the applicable import and export laws and regulations of Enterprise Customer's country, of the United States and any other applicable jurisdiction. Without limiting the foregoing, Enterprise Customer represents that it is not named on any U.S. government list of persons or entities prohibited from receiving exports, and you shall not permit your Affiliates, Shop Users or Clients to access or use the Squire Platform and Squire Services in violation of any United States export embargo, prohibition, restriction, law or regulation.

XV. LIMITED USE.

The Squire Platform and Squire Services are "Commercial Products" and "Commercial Services" defined at 48 C.F.R. §2.101, and consist of "Commercial Computer Software" and "Commercial Computer Software Documentation", as defined in 48 C.F.R. §12.212 or 48 C.F.R. §227.7202, as applicable (the "**Applicable D/FAR Regulations**"). Consistent with the Applicable D/FAR Regulations, the Squire Platform and Squire Services are being licensed to the U.S. Government end users only as Commercial Products and Commercial Services and with only those rights that are granted to all other end users pursuant to these Enterprise Terms and use, duplication or disclosure by the U.S. Government are subject to the limited rights set forth in the Applicable D/FAR Regulations. No other Federal Acquisition Regulation or Defense Acquisition Regulation or any other governmental terms or rights affecting the license or intellectual property rights of the Squire Platform and Squire Services apply unless explicitly set forth on an applicable Order Form.

XVI. MISCELLANEOUS

1. **Entire Agreement:** These Enterprise Terms, the Privacy Policy, any Order Form, as well as any additional terms, schedules, appendixes, exhibits, documents, or policies referenced herein, set forth the entire understanding between you and Squire with respect to the Squire Platform and the Squire Services and supersede any prior agreements between you and Squire with respect to the matters set forth herein. In the event of a conflict between the Order Form and these Enterprise Terms, the Order Form shall control. In the event of a conflict between these Enterprise Terms and the Website Terms of Service, these Enterprise Terms will control to the extent of the conflict.
2. **Severability:** Unless stated otherwise in these Enterprise Terms, if any provision of these Enterprise Terms is held to be invalid or unenforceable by a court of competent jurisdiction, such provision shall be struck and the remaining provisions shall be enforced.
3. **Survival:** All provisions of this Agreement, which by their nature should survive the expiration or termination of this Agreement, including without limitation, sections pertaining to Warranties & Disclaimers, Indemnification, Limitation of Liability, representations made by you and debts owed to Squire, will survive the termination of this Agreement.
4. **No Waiver:** If we fail to enforce any of our rights under these Enterprise Terms, or applicable laws, it shall not be deemed to constitute a waiver of such right.
5. **Assignment:** You may not transfer or assign any rights or obligations you have under this Agreement without Squire's prior written consent. Squire reserves the right to transfer or assign this Agreement or any right or obligation under this Agreement at any time. Squire may also subcontract either wholly or partially, any of the Squire Services to its Affiliates or a third party.
6. **No Third-Party Beneficiaries:** No third-party shall have any rights to enforce this Agreement.
7. **Relationship of the Parties:** Squire is an independent contractor for all purposes. Nothing in this Agreement is intended to, and shall not be construed to, create any joint venture, partnership, employer-employee, franchisor-franchisee, or agency relationship (except to the extent agreed under Section V(c)(iii)) between you and Squire.
8. **Governing Law:** These Enterprise Terms and the relationship between you and Squire shall be governed by the laws of the State of New York without regard to its conflict of law provisions. Other than as provided with respect to arbitration, you and Squire agree to submit to the personal and exclusive jurisdiction of the courts located in New York City, Manhattan, New York County, New York.
9. **Jury Waiver:** EACH PARTY HEREBY WAIVES, TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW, ANY RIGHT TO A TRIAL BY JURY IN RESPECT OF ANY LEGAL PROCEEDING ARISING OUT OF OR RELATING TO THESE TERMS, INCLUDING ANY COMMON LAW OR STATUTORY OR OTHER CLAIMS UNDER LOCAL, STATE, OR FEDERAL LAW.
10. **Insolvency Proceedings:** If any proceeding by or against you is commenced under any provision of the United States Bankruptcy Code, as amended, or under any other bankruptcy or insolvency law, Squire will be entitled to recover all reasonable costs or

expenses (including reasonable attorney's fees and expenses) incurred in connection with the enforcement of these Enterprise Terms.

11. Time Limitations: You and Squire both agree that regardless of any statute or law to the contrary, any claim or cause of action arising out of or related to these Enterprise Terms must be filed within ONE (1) YEAR after such claim or cause of action arose or be forever barred.

12. Disputes; Arbitration:

i. **Disputes;** Mandatory Informal Dispute Resolution: We want to address your concerns without needing a formal legal case. Before filing a claim against Squire, you agree to try to resolve the Dispute informally by contacting us at support@getsquire.com. We will try to resolve the Dispute by contacting you via email, but if we cannot resolve the Dispute within thirty (30) days of submission, you and/or Squire agree to resolve any claims related to these Enterprise Terms through final and binding arbitration, except as set forth under 'Exceptions to Agreement to Arbitrate' section below.

ii. **Arbitration Agreement:** Except in the event the claim meets the requirements set forth in the "Exceptions to Agreement to Arbitrate" section below, all claims shall be settled by binding arbitration in accordance with the commercial arbitration rules, in effect at the time the proceedings begin, of the American Arbitration Association. Any such controversy and/or claim shall be arbitrated on an individual basis, and shall not be consolidated in any arbitration with any claim or controversy of any other party. All information relating to and/or disclosed by any party in connection with the arbitration of any Disputes shall be treated by the parties, their representatives, and the arbitrator as proprietary business information and shall not be disclosed without prior written authorization of the disclosing party. The arbitration shall be held in New York City, Manhattan, New York County, New York, USA or any other location we agree to. Each party shall bear the burden of its own counsel fees incurred in connection with any arbitration proceedings. THE ARBITRATOR WILL NOT BE EMPOWERED AND DOES NOT HAVE THE AUTHORITY TO HEAR OR DECIDE ANY CLASS, CONSOLIDATED OR REPRESENTATIVE ACTION, TO AWARD PUNITIVE OR EXEMPLARY DAMAGES OR TO AWARD ATTORNEYS' FEES TO THE PREVAILING PARTY.

iii. Exceptions to Agreement to Arbitrate: Either you and/or Squire may assert claims, if it qualifies, in small claims court in New York City, Manhattan, New York County, New York. Either party may bring a lawsuit solely for injunctive relief to stop unauthorized use and/or abuse of the Squire Platform, Squire Services, breach of Squire's confidential information and/or intellectual property infringement (for example, trademark, trade secret, copyright and/or patent rights) without first engaging in arbitration and/or the informal Dispute-resolution process described herein.

13. Force Majeure: Squire will not be held liable for any delays or failure in performance of any part of the Squire Platform or Squire Services, from any cause beyond our reasonable control. This includes, but is not limited to, acts of God, changes to law or regulations, embargoes, war, terrorist acts, riots, fires, earthquakes, pandemics, nuclear

accidents, zombie apocalypse, floods, labor unrest, strikes, telecommunications failures, utility failures, power blackouts, volcanic action, unusually severe weather conditions, and acts of hackers, or third-party internet service providers. Nothing in this Section will affect or excuse your liabilities and obligations under these Enterprise Terms including, but not limited to, your payment obligations hereunder.

14. **Electronic Signatures:** You agree to the use of electronic signatures (e.g. via PactSafe, DocuSign, Hello Sign, Adobe Sign, or otherwise) to enter into this Agreement, Order Forms or otherwise. Further, you hereby waive any rights or requirements for an original “wet signature” (non-digital) or delivery or retention of non-digital records, to the extent permitted under applicable law.
15. **Electronic Communications:** You agree and consent to electronic receipt of all communications that we provide in connection with your Squire Platform Account and the Squire Services. You also agree that your electronic consent has and will have the same legal effect as a physical signature. Since the Squire Services are an electronic service, you agree that Squire has no obligation to send, and you have no right to receive, communications in paper form, unless otherwise required by applicable law. We will provide communications to you by making them available through your Squire Platform Account or by emailing them to you at the primary email address listed in your Squire Platform Account profile.
16. **Notices:** As noted above relating to the electronic communications authorized in Section XVI(o), you acknowledge and agree that any notices provided by Squire as required by law or pursuant to the terms of this Agreement may be delivered to you by making them available through your Squire Platform Account or by emailing them to you at the primary email address listed in your Squire Platform Account profile. You hereby consent to receive notice from Squire through these electronic means, and such notices shall be deemed effective when sent on the next immediate business day. Any notices to Squire must be delivered via email to support@getssquire.com with a hard copy to follow via first class registered U.S. mail or overnight courier to Squire Technologies, Inc., 216 Bowery, 3rd Fl, New York, NY 10012, Attn: Legal Department.
17. **Support:** For more information, insight, and articles about utilizing the Squire Platform and Squire Services, please visit our FAQ page at <http://getssqr.co/support>. Otherwise, please feel free to reach out to us directly at support@getssquire.co

