Consult KTC - Research, Advisory and Resourcing

Statement of Work

Project Overview

This project aims to develop an innovative Business Services platform for www.consultktc.com, designed to revolutionize how companies and consultants connect and collaborate. The platform will serve as a comprehensive **Research, Advisory and Resourcing management portal**, enabling companies to effortlessly manage their business needs by accessing a curated pool of qualified consultants.

This scope presents an overview of the project's high-level roadmap, which has been strategically divided into distinct phases for systematic execution. This phased approach ensures a structured and organized development process, aligning with the project's objectives and timeline:

Phase-Wise Development and Execution Plan

Phase 1: Website Design, Initial Development, UAT and Deployment

- **Website Design and Development:** Design a visually compelling and sophisticated website that serves as the cornerstone of the platform's online presence.
- **Brand Identity:** Establish a strong brand identity by creating a distinctive logo, comprehensive brand guidelines, and engaging animated videos.
- **User Registration**: Implement a user registration system that allows clients and consultants to create accounts and access the platform's features.
- **Unlisted Services:** A basic feature placed alongside existing services. It allows clients to request services similar to those already offered on the platform.
- **User Acceptance Testing (UAT)**: Perform UAT to validate the website's functionality and gather feedback before deployment.
- **Deployment**: Finalize and deploy the website, ensuring it is fully operational and accessible to users.

Features

- **Assigning of Tests:**
    - Admin should be able to assign tests to consultants with optional time-bound restrictions.
    - A workflow shall allow clients to assign tests, but only upon Admin approval can the test be delivered to the consultant.
    - Test results to be shared with clients only after Admin approval, otherwise, they remain visible only to Admin.
- **Assigning of Surveys:** Like the test assignment feature above, Admin and clients can assign surveys following the same workflow and approval process.
- **Easy-to-Use Functionalities:** The Super Admin interface must be designed for non-technical business users, ensuring ease of use.
- **Logos Showcasing:** There needs to be a dedicated column to display logos of partners or clients, enhancing credibility and visibility.
- **Reporting:** The platform should provide automated reports on hit rates, countries accessing the site, recurrent users, storage usage, etc.
- **Automated Monthly/Quarterly Engagement Reports:** Engagement reports to be automatically generated and sent to users monthly/ quarterly to keep them informed of their activity. This in-turn give them a better view of their earnings or expenses.
- **Real-Time Alerts for New Inquiries, Appointments and Messages:** Set up real-time alerts to notify users of new inquiries, upcoming appointments and received messages.

- **Reminders for Incomplete Tasks:** Implement automatic reminders for incomplete tasks to ensure timely follow-ups and completion.
- **Task Allocation and Status Tracking for Consultants:** A feature should be available to allocate tasks to consultants and track their status in real time.
- **Security Parameters:** All content must comply with necessary security parameters and global data protection standards.
- **SSL Encryption for Data Transfers:** All data transfers must be encrypted using SSL to ensure secure communication.
- **CAPTCHA Implementation:** Implement CAPTCHA for login and form submissions to prevent automated spam.
- **GDPR Compliance**: GDPR compliance must be integrated into the development roadmap from the beginning to ensure data protection and privacy standards are met throughout the project.
- **Quality Standards:** Define Quality assurance standards that should be followed to ensure consistency, reliability and user satisfaction.
- **Daily Automated Backups with Restore Options:** Daily automated backups should be in place with easy restore options to ensure data recovery in case of system issues.
- **Disaster Recovery Plan and Procedures in Place:** A disaster recovery plan must be in place to handle any potential system failures or data loss, ensuring minimal downtime.
- **Security Enhancements**: Implement an "I am not a robot" CAPTCHA feature to enhance platform security and prevent automated spam submissions.
- **OTP Verification for Login**: Implement OTP (One-Time Password) verification for both clients and consultants during login to enhance security and user authenticity.
- **Alias Name Option for Consultants**: Provide an option for consultants to use an alias name on the platform to maintain anonymity, if desired.

Phase 2: Advanced Feature Implementation

- **Calendar Booking:** Implement a calendar booking system that allows clients and consultants to schedule appointments with automatic time zone adjustments. This must send automated notifications to all parties.
- **Audio/Video Conferencing:** Integrate audio and video conferencing tools to facilitate real-time communication between users. Suggest as a separate Price line item.
- **E-Commerce Compatibility:** Integrate an e-commerce system that supports financial transactions on the platform, enabling clients to make payments directly for services rendered.
- **Financial Transactions and Tax Compliance:** Develop a system to manage payments to consultants after deducting the platform's margin, with automated handling of applicable taxes for each country, ensuring global compliance. *It is understood that some level of human oversight will be required for verifying payments and remittance approvals.*
- **Performance and Social Media Marketing Strategy:** Ensure platform visibility through performance marketing, SEO and social media strategies, with this running parallel to Phase 2. This will be priced separately.
- **Security Auditing and Vulnerability Scanning:** Implement security auditing and vulnerability scanning tools to detect/address potential security risks.
- **Feedback and Rating Systems:** Integrate a system that allows clients to rate consultants and provide feedback.

- **Real-Time Alerts and Reminders:** Set up real-time alerts for new inquiries, appointments, messages and reminders for incomplete tasks.

Phase 3: Add-On Features, Expansion and deployment completion

- **App Development:** Develop a mobile application that provides users with on-the-go access to the platform's features, ensuring a consistent experience across all devices.
- **Additional Enhancements:** Explore and implement other potential add-on features that align with user needs and market trends, such as AI-driven analytics, multilingual support, or integration with third-party tools.
- **Scalability and Optimization:** Continuously optimize the platform's performance and scalability to accommodate growing user demand and evolving business requirements.
- **Deployment Completion**: Finalize the deployment of all features, ensuring they are fully integrated, tested and functioning as intended.
- **Daily Automated Backups:** Ensure daily automated backups with easy restore options are in place.
- **Disaster Recovery Plan:** Establish a disaster recovery plan to minimize downtime in case of system failure.

Phase 4: Continuous Support and Change Request Management

- **Monitoring and Analytics:** Implement comprehensive monitoring tools to continuously track the platform's performance, security, and user activity. This includes real-time analytics and automated alerts for any irregularities or potential issues.
- **Issue Remediation:** Establish a rapid response process for identifying, diagnosing, and resolving issues as they arise. This includes bug fixes, security patches, and system updates to maintain platform stability and integrity.
- **Data Backup and Recovery**: Implement robust data backup and recovery solutions to protect against data loss. Regular backups will be scheduled to ensure that all critical data is securely stored and can be quickly restored in the event of system failures or data corruption.
- **Change Request Management:** Develop a structured process for handling change requests from users or stakeholders. This includes assessing the impact of changes, prioritizing them based on business needs, and implementing them in a controlled manner.
- **Continuous Improvement:** Regularly review and enhance platform features and functionalities based on user feedback, industry trends, and technological advancements. This ensures the platform evolves to meet the changing needs of its users.
- **Support and Maintenance:** Provide ongoing technical support to users, including troubleshooting, user assistance, and updates to documentation. This ensures a smooth user experience and minimizes downtime.
- **Compliance and Security Audits:** Conduct regular compliance and security audits to ensure the platform adheres to industry standards and regulations, safeguarding user data and maintaining trust.

Through this initiative, a robust, user-centric solution will be developed that enhances efficiency, collaboration and growth in the B2B space.

Target Audience

- **Prospective Clients**: Companies in search of Research, Advisory, or Resourcing services will utilize the platform to find and connect with qualified consultants. Clients may also request quotations via the platform.
- **Consultants**: Professionals and experts looking to display their skills and projects will use the platform to reach potential clients and opportunities.

Comprehensive Web Portal Development Elements

Objective: To create a visually compelling, highly functional and secure web portal that effectively showcases services, engages users, and establishes a strong brand identity. This portal will be the cornerstone of the client's online presence, offering a flexible foundation for future enhancements and growth.

Core Elements:

- Digital Representation & User Engagement:
  - Develop a sophisticated and visually appealing website that serves as the primary digital representation of the our services and expertise.
  - Design an intuitive user interface that encourages interaction and easy navigation, enabling visitors to explore services and engage with the platform effortlessly.
- Brand Identity & Informative Content:
  - Establish a cohesive brand identity through the creation of a distinctive logo, comprehensive brand guidelines, and consistent visual communication across all digital platforms.
  - Create clear, concise and structured content that effectively communicates the value proposition and key offerings, ensuring visitors understand the full range of services provided.
- Foundation for Growth & Security:
  - Lay the groundwork for future enhancements by developing a flexible and scalable website architecture that can easily accommodate additional features and functionalities.
  - Implement a robust security environment to protect sensitive information, such as banking details, ensuring compliance with industry standards.
- Desired Solution:
  - Develop a visually striking and modern design that aligns with the client's brand identity, creating a memorable and immersive online experience.
  - Integrate a user-friendly content management system (CMS) to enable seamless content updates, allowing clients to manage and publish new content efficiently.
  - Ensure mobile responsiveness to provide a consistent and engaging experience across various devices.
  - Equip administrators with a backend admin panel for full control over the website's content, users, and settings, ensuring smooth and efficient platform operations.

Must-Have Features:

- Intuitive User Design:
  - The website will feature an easy-to-navigate layout, ensuring visitors can quickly and efficiently find the information they need.
- Engaging Homepage Animation:

  - A dynamic animated video with sound on the homepage will effectively convey the website's purpose and the value of its services, capturing visitor attention right from the start.
- Efficient Search Functionality:
  - Implement a robust search feature that allows users to quickly locate specific services or resources, enhancing the overall user experience.
- Comprehensive Service and Process Overview:
  - Dedicated sections will highlight the services offered, providing clear explanations and a detailed process overview that guides visitors from initial inquiries to final engagements.
- Strategic CTAs & Optimized Performance:
  - Strategically placed calls-to-action (CTAs) will facilitate quick inquiries, while the site will be optimized for fast loading times and responsiveness across all devices, ensuring a seamless user experience.
- SEO Best Practices:
  - The website will be built with search engine optimization (SEO) best practices in mind, ensuring it ranks well on search engines and attracts relevant traffic.
- Informative Blog or News Section:
  - A dedicated space will be provided for sharing industry insights, updates and company news to engage and inform visitors.
- Credibility through Testimonials and Case Studies:
  - Display client success stories and feedback to build credibility and trust with potential clients.
- Seamless Social Media Integration:
  - The website will include seamless connectivity with social media platforms, enhancing brand visibility and engagement across digital channels, and expanding opportunities for acquiring and hiring additional resources.
- Streamlined Appointment Scheduling:
  - Integrate a calendar booking system that facilitates efficient client/consultant interactions with automatic time zone adjustments.
- User Registration & Personalized Dashboards:
  - Enable users (both clients and consultants) to register and log in, providing them with personalized dashboards for an enhanced user experience.
- Real-Time Video & Audio Conferencing:
  - Incorporate integrated video and audio conferencing tools to facilitate real-time communication between clients and consultants.
- Automated Notifications and Reminders:
  - Set up automated alerts to keep users informed and on schedule for their upcoming appointments.
- Enhanced Dashboard Insights:
  - Develop comprehensive dashboards that offer users valuable insights into their activities and engagement on the platform.
- Advanced Analytics and Reporting:
  - Equip the platform with advanced tools that deliver actionable data and reports, empowering both administrators and users to make informed decisions.

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Flowchart Outline

1. **Home Page**
   - The user lands on the website's home page.
   - Options available: "Login" or "Sign Up"
2. **Login/Sign Up Page**
   - Options for Login:
     - Client
     - Consultant
     - Super Admin
     - Practice Owner
   - Sign Up option only for Clients and Consultants.
3. **External User Login/Sign Up Process (Clients and Consultants)**
   - **Sign Up Option Selected**
     - **Choose Role**: Client or Consultant
     - **Sign Up Method**:
       - Option 1: Sign Up with LinkedIn
       - Option 2: Sign Up with Email
     - **LinkedIn Authentication**:
       - Redirect to LinkedIn for authentication.
       - Retrieve user profile data from LinkedIn.
       - Store in database.
       - Redirect to Profile Setup page.
     - **Email Sign Up**:
       - User fills in details (Name, Email, Password).
       - Email verification step.
       - Upon verification, redirect to Profile Setup page.
   - **Profile Setup Page**:
     - User enters additional details (Industry, Skills, Experience, Projects, Video intro, etc.).
     - Option to upload a profile picture or logo.
     - Add Bank account details – Need a disclaimer on accuracy and correctness.
     - Save profile information.
     - Redirect to User Dashboard.
   - **Login Option Selected**:
     - Choose Login Method: LinkedIn or Email.
     - **LinkedIn Authentication**:
       - Redirect to LinkedIn for authentication.
       - On successful login, redirect to User Dashboard.
     - **Email Login**:
       - Enter credentials.
       - On successful login, redirect to User Dashboard.
   - **User Dashboard**:
     - Display user-specific data, projects, tests, surveys etc.
4. **Internal User Login Process (Super Admin and Practice Owner)**
   - **Login Option Selected**:

        - **Super Admin**:
            - Enter credentials.
            - On successful login, redirect to Admin Dashboard.
            - **Admin Dashboard**:
                - Manage Users (Clients, Consultants, Practice Owners).
                - Manage Portal Settings.
                - View Analytics and Reports.
        - **Practice Owner**:
            - Enter credentials.
            - On successful login, redirect to Practice Dashboard.
            - **Practice Dashboard**:
                - Manage Client and Consultant assignments.
                - View project status and reports.
                - Communication tools for interacting with Clients and Consultants.

5. **Error Handling**
    - Display error messages for incorrect login credentials.
    - Provide options to reset the password.
6. **Forgot Password Process**
    - **Enter Email**:
        - User enters the registered email.
        - Send a password reset link to the email.
    - **Reset Password**:
        - User clicks the link.
        - Enters a new password.
        - Save and redirect to Login page.
7. **End**
    - Process completion.

Complete Sitemap

- **Home**
- **About Us**
    - Company Overview
    - Vision & Mission
    - Use Cases/Testimonials
- **Services**
    - Refer to Portfolio Document
- **How It Works**
    - Step-by-Step Process Overview
    - For Clients (How to Request Services, Get Quotations)
    - For Consultants (How to Showcase Projects, Connect with Companies)
    - FAQs
- **Case Studies/Success Stories**

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- **Featured Projects**
    - Client Success Stories
- **Contact Us/Enquiry**
- **Privacy Policy**
- **Disclaimer**
- **Sitemap**
- **Terms & Conditions**

Anticipated timelines:

BAFO Submission Deadline: COB 13th Sep 2024
Presentation and Pricing walkthrough: Ideally the following working day after BAFO

Contract Award and Negotiations

- Contract Award: 23rd to 27th September 2024
    - Contract finalization: Review and finalize the legal terms, scope, milestones, pricing and payment terms.
    - Legal & Compliance Review: Ensure all compliance-related checks
    - Kickoff Meeting: Formal project kick-off with key stakeholders to review timelines, deliverables and roles.

Phase 1: UAT and Initial Deployment

- UAT Completion: By 15th November 2024
- Phase 1 Deployment: By 29th November 2024
    - Development & Testing: Development teams complete coding and initial testing of core features (branding, UI/UX, login, search, etc).
    - User Acceptance Testing (UAT): Pilot users (internal and external) test the platform to ensure usability and feature functionality.
    - Feedback Loop: Gather feedback from UAT users for any adjustments or fixes. Focus on user interface, experience, performance and responsiveness.
    - Initial Deployment (Go-Live Phase 1): Release the platform to a controlled set of users to go live with essential features.

4. Monitoring & Feedback (Post-Go-Live)

- Period: Mid December 2024
    - Monitor User Experience: Track user behaviour, navigation paths, client engagement and pain points on the platform.
    - Business Operations Monitoring: Ensure smooth operations on the platform, especially for the system, client-queries, and support.
    - Client and Consultant Feedback: Survey users and gather feedback on their experience to improve functionalities before Phase 2.

Phase 2: Advanced Feature Deployment

- Calendar Booking, Conferencing & E-Commerce Compatibility
- Deployment Target: March 2025
    - Feature Development: Develop and test advanced features like calendar bookings with time-zone adjustments, video conferencing and e comm services.

    - User Feedback Incorporation: Implement feedback gathered from Phase 1 to improve the advanced feature set.
    - Testing and Deployment: Ensure the new features integrate seamlessly with existing ones before final deployment.

Post-Phase 2 Monitoring and Adjustments

- Period: April 2025
    - Monitor Advanced Features: Track how well the advanced features are functioning, especially in client-consultant interactions.
    - Monitor Market Impact: Evaluate platform's impact on business, user engagement, and subscription sign-ups.
    - Refinement: Make necessary adjustments to optimize client experience and streamline processes.

Phase 3: Expansion & Deployment of Mobile App

- App Development and Feature Expansion
- Deployment Target: May 2025
    - App Development: Develop and launch a mobile app that provides access to all web platform functionalities.
    - Scaling Operations: Further scalability updates, based on user growth and future-proofing.
    - Additional Enhancements: Based on market trends, explore additional enhancements like AI-driven analytics or third-party integrations.

Monitoring Phase Post-Phase 3

- Period: June 2025
    - Assess App Usage: Monitor app downloads, usage and user feedback.
    - Business Growth Analysis: Evaluate overall growth trends, revenue and subscription numbers.
    - Refinement Based on Feedback: Adjust mobile app and web features based on real-time feedback.

Phase 4: Continuous Support, Maintenance & Client Experience Optimization

- Target: From Aug 2025 onwards
    - Client Experience Evaluation: Regularly assess user satisfaction, functionality and business performance.
    - Ongoing Support: Provide continuous technical support for issues or bugs and performance optimization.
    - Feature Enhancements: Continue refining features based on feedback and evolving business needs.
    - Marketing & Performance: Implement parallel marketing strategies (SEO, social media) to enhance platform visibility.
    - Monitoring and Security: Regular audits of system performance, data security and global compliance
    - Recurrence Planning: Define a recurrent model for ongoing updates and regular support cycles.

Project Scope:

Wireframe	Visual Design	Website Development
Homepage Structure	• 1 version Homepage design with min 2 times modifications. • 1 version Service Details Page design with 2-time modification. • 1 version Generic Inner Page design with 2-time modification. • 1 version Form Page design with 2-time modification.	• HTML, and CSS coding for the latest browsers (Safari, Google Chrome, Firefox, Microsoft Edge) with responsiveness (for standard iOS and Android devices). • Development - Every section of the website can be managed from the website backend (CMS). • 2 / 3 Webforms integration - After submission, the form data will be sent to the admin & user Email ID, and submitted data will be stored in the database for future review. • Basic jQuery implementation like Menu Dropdown, Banner slideshow, popup, and lightbox gallery.

Tech Stack Selection: WordPress and React.JS:

Web Browser	Minimum Version Supported
Google Chrome	111.x
Safari (only on MacOS/iOS)	16.x
Mozilla Firefox	110.x
Microsoft Edge	111.x

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Adherence

- **Penalty Clauses**: Specific penalty clauses will be established for non-adherence to timelines, quality standards, and other critical project deliverables, such as financial penalties or extensions of project timelines, to ensure accountability and adherence to the project's objectives.

Uptime and Storage Requirements

- **Uptime:** The platform must guarantee a 99% uptime to ensure continuous and reliable access for all users. This level of availability is critical to maintaining the trust and satisfaction of both clients and consultants, as well as ensuring the smooth operation of all platform features. The system's uptime is expected to improve after the completion of Phase 1. We will reassess and refine the process when we reach that stage to ensure optimal performance.
- **Storage:** The platform will require a robust, cloud-based storage solution with a capacity of at least 100 GB. This storage must be scalable and secure, capable of handling large volumes of data, including user profiles, project files, audio/video recordings, and other essential resources, without compromising performance or data integrity.

Intellectual Property

All intellectual property rights, including but not limited to source codes, technical documentation, test scenarios, design assets, and any other deliverables developed or produced during the course of this project, shall remain the property of the Knowledge Trading Company granting KTC exclusive ownership and control over the aforementioned intellectual properties.

Furthermore, KTC will retain a perpetual, royalty-free license to use, modify and incorporate any generic components of the source code, documentation or other materials developed during the project for future projects or internal purposes, provided that such use does not infringe upon the client's proprietary interests or violate the terms of this agreement.

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