**Request for Proposal**

Project Name:

Externalized Product Engine

RFP Ref No:

**[TBC]**

**Prepared by:**

FTLife IT

**Document Date:**

**TBC**

**Version:**

0.1

Confidentiality Statement

This document is private and confidential to FTLife Insurance Company Limited and the organization to which it has been addressed. The document and the information contained therein must not be given or communicated to any other parties without explicit written permission of FTLife Insurance Company Limited.

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# 1. Introduction

## 1.1 About FTLife

FTLife Insurance Company Limited ("FTLife") has been a wholly-owned subsidiary of NWS Holdings Limited since 2019. This is a signiﬁcant milestone for us as it marks the start of a new era under the umbrella of New World Group.

We have more than 30 years of heritage in providing individuals and institutions with diversiﬁed insurance and ﬁnancial planning products and services, including life, health, accident, savings and investment insurance. As a member of New World Group, we work with diversiﬁed businesses within the Group to create synergies and provide our customers with best-in-class life-planning solutions, from wealth management and succession to health, well-being and quality of life enhancement, that help them lead more fulﬁlling lives.

It is a golden era full of opportunities. We will leverage the diverse businesses and great business network of the Group to work side-by-side with different stakeholders as we strive for continuous innovation and success.

## 1.2 Objectives

FTLife is constantly looking for new and innovative ways to improve customer experience and engagement. It is seeking a new product engine and point-of-sales application that will centralize our product development platform, enable integration with all customer-facing/ channel-facing/ third-party systems to use the service enabled in this platform, and streamline our internal processes. The objective of this project is to enhance our ability to develop and deliver products and services to our customers with increased speed, flexibility, and accuracy, and to provide a more seamless and efficient customer experience. Specifically, we aim to achieve the following objectives:

Centralize our product development platform: Our current product development process is fragmented, with separate teams responsible for different systems. This results in duplicated effort, inconsistent data, and a lack of efficiency in the product development process. The new product engine and point of sales application should enable us to centralize our product development platform, with a single source of truth for all product data, rules, and calculations, and a standardized approach to product development and testing.

Enable third-party systems to integrate with our systems: In order to reach more customers and expand our business, we need to enable third-party systems, such as brokers and agents, to access and sell our products. The new product engine and point of sales application should provide a flexible and scalable approach to product integration, with sync and async web services that can be easily integrated into third-party systems. It should also provide a secure and reliable way to share product data and information with external systems.

Streamline our internal processes: Our current product development are manual and time-consuming, with multiple handoffs and manual interventions. The new product engine and point of sales application should streamline our internal processes, with automated workflows, testing, approvals, and a self-service portal for internal users to manage products and services.

Enhance the customer experience via new selling journey: Our customers expect a seamless and personalized experience when they interact with us. The new product engine and point of sales application should provide a modern and intuitive user interface, with easy-to-use product selection and customization tools. It should also provide a seamless integration with our other systems, such as our internal service-layer and payment gateway, to provide a consistent and integrated experience across all touchpoints.

In summary, the objective of this project is to transform our product development and sales processes, and enhance our ability to deliver innovative and customer-centric products and services. We are seeking a vendor who can provide a robust and scalable product engine and point of sales application, with a proven track record of delivering similar solutions to the insurance industry. The vendor should have deep expertise in product development, software engineering, and integration, and should be able to work closely with our internal teams to ensure a successful implementation.

The RFP will outline the specific requirements for the externalized product engine, including functional requirements, performance requirements, and technical requirements in Section 2, and the process and timeline of proposal submission and evaluation in Sections 3. The successful vendor will provide a solution that meets these requirements and delivers a high-quality user experience to FTLife and our customers. This document is issued for information and planning purposes and does not commit FTLife to contract for any service or deliveries. FTLife will not reimburse any costs incurred as a result of participation in response to the RFP.

The total value of the proposal should not include the cost of infrastructure, cloud subscriptions and tools (i.e. software or license subscription).

## 1.4 Statement of Work

The statement of work will cover the followings topics, and details should be referred to Section 2 of this RFP.

**Part 1: Project Scope – business needs, application architecture design & implementation:**

1. **Business Needs**:

Externalized Product Engine: The vendor shall provide a Product Engine that will centralize the product development platform and able to expose the component such as Quote, Proposal Generator as well asl automate testing tools, and provide a migration plan.

Point of Sales Application (POS): The vendor shall provide a front-end application to sales channel (Agency & broker etc) to complete the end-to-end sales process, including review client profile, quick quote, product recommendation, FNA, proposal generation, e-signature, e-application & e-submission.

Migration Plan:

The vendor shall provide a Migration Plan that will enable the company to migrate its products from the old platform to the new platform.

1. **Architecture**: Suggest application architecture of the POS tool & externalized product engine, including front-end (responsive Webapp or native Apps supporting all devices), development framework, design required API, middle layer, communication protocol. FTLife would adopt microservice architecture design – API-led and/or event driven approach. As well as data integration with FTLife Operation Data Store (ODS) platform.
2. **UI/UX**: Suggest UI of application. Creative design for homepage, all screens including header, footer, navigation and search function. Suggest UX of each workflow and create mobile responsive design align with desktop changes. Wireframe & Prototype is required in development phase.

**Part 2: Project Management**

1. Propose and set up TOM (Target Operation Model) of project phase
2. Suggest a transition method from the project TOM to ongoing running (i.e., BAU) phase

**Part 3: Project management & delivery approach**

1. Delivery approach should be in Agile way of working and there shall be focus in delivering an initial MVP and beyond.
2. Scope is suggested by phase together with the delivery approach and target sunset systems.

# 2. Requirements

## 2.1 Functional Requirements (TBC)

Product Engine and Point of Sales Application shall meet the following requirements:

* Ability to centralize product development platform
* Ability to reuse product development for client-facing and third-party systems
* Capability to manage multiple products and pricing models
* Flexibility to support future product changes and enhancements
* Ability to integrate with other systems and data sources
* User-friendly interface for product development and management

Automated Testing Tool:

* Ability to automate functional and regression testing on formula calculation result and the illustration output
* Capability to generate detailed test reports
* User-friendly interface for test case management and execution

Migration Plan:

* Ability to migrate products from the old platform to the new platform with minimal disruption to business operations
* Capability to test migrated products to ensure functionality and accuracy

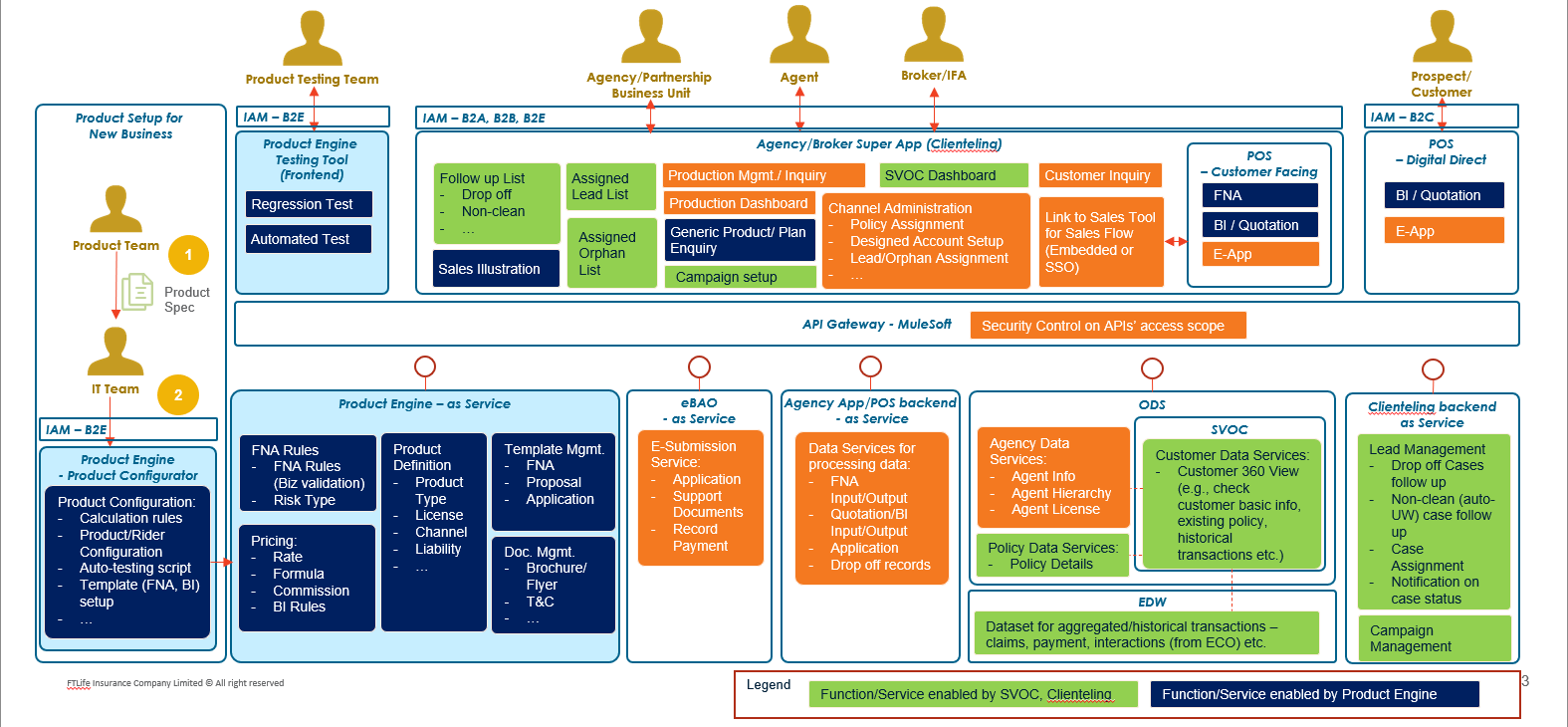
## 2.2 Technical Requirements

Mobile Accessibility: The application should be accessible from mobile devices – include mobile and tablet, with a responsive design and optimized user experience – the approach could be Web Application or Native Apps. For Web-based solution, it should work with a variety of industry-standard web browsers (e.g. supporting last 2 version of Edge, Chrome, Safari). For mobile based solution, it should work with last 2 major release version of iOS and Android platform. Service provider should demonstrate the ability to maintain application on new OS version before official launch to public. (*Golden-build release testing mechanism*)

User Experience: The application should have a user-friendly interface, with clear navigation and accessible information – the vendor should provide wireframe and prototype for project members’ comment during development phases.

Integration: The application should be able to integrate with other systems, such as point-of-sale (POS) systems, customer portal. The design approach should adopt micro-services design, integrated with MuleSoft (API) platform and/or message broker – including sync/async integration approach. The potential service provider should design and the requirement of API for front-end consumption.

Reference architecture diagram.



End-of-Life Components Upgrades Mechanism: Service provider should recommend and demonstrate the ability to manage and conduct upgrades on EOL components including programming language, middle layer, database etc.

Reliability: The application should be reliable with High Availability (HA) design and 7x24 business needs. The application design should adopt a low downtime and minimal system errors principle. All system errors should be logged and traceable in servers and able to integrate with logging system. Appropriate error handling should be in place.

Scalability: The target no. of frontend user is around ~3000 and ~20 back-office user. The application should be designed to scale to accommodate growth and changing business demands, including the ability to accommodate increasing numbers of users, customers, and data.

Speed and Responsiveness: The application should be fast and responsive, with minimal latency and high information retrieval speed, including response times, load times, and the ability to handle large amounts of data. In principle, the average response time should be around below 3 seconds to avoid end-user feeling delay. For example, consider paging handling if large data is displayed.

Implementation and Training: Service provider should provide technical support, documentation including application architecture diagram, workflow/ sequence diagram in design & development phase. Implementation guideline, deployment procedure documentation, technical knowledge transfer and provide end-user manual & training during the implementation stage & post implementation phase.

Compliance: The solution should fulfil the requirements for compliance with industry standards and regulations, including data privacy laws.

Identity access management: Account life cycle including Activation, Identification, Authentication, SSO, reset/forgot password should be in place. Application authorization and authentication for system user (Back-office user) & end user(Agency) should be facilitated by Microsoft MS AD/ADFS or OAuth 2.0 standard. O365 is used for agency login.

Infrastructure requirement

* Cloud Deployment model is preferable. Experience on Azure App Service is a plus.
* CI/CD pipeline should be in place to support versioning, testing, deployment automation.
* Network partitioning or policy will be used: Network policy should be applied to achieve network isolation between different environments (e.g. Production, Testing and Development)
* If applicable, schedule job should be used and defined on BMC Control-M. All business data should be stored on separated data storage and physical partitioned with other customers, it will need to be controlled by well governed access control policy and processes
* Data transfer from FTLife to the vendor platform need to be encrypted (e.g. VPN tunnel) and the connectivity design shall be approved by FTLife
* Data backup must be performed at daily basis in encrypted format, the backup image should be able download to offsite for fulfill data retention and protection purpose

Data Security

* No confidential information should be residence on the end user device
* If there is need for storing the confidential or sensitive information in end user device, strong encryption which comply industrial standard is required.
* Data in transit must be encrypted
* If data are not stored in FTLife managed storage, proper physical security, network security and storage security should be applied to ensure data/information as well protected in terms of confidential, integrity and availability. Vendor should demonstrate how data security can be assured and FTLife could remain the data owner, exhibit control and revocation of data in case of data lose or suspect environment compromised.

Device Security

* End device application should be as treated as application and comply to the application security. For example, scan for malware, vulnerability must be performed and critical and high vulnerabilities must be remediated. Low to medium vulnerabilities should be reviewed and remediated at FTLife’s discretion.

Application Security

* Should support modern and robust authentication such as OpenID connect, OAUTH
* Secure SDLC must be in place to ensure the application software and code delivery is secure.
  + Security coding practice must be in place, properly code scanning (both quality and security scanning), code review must be conducted to ensure the code comply to industry secure software development framework (SSDF).  Related report should be provided to demonstrate the compliance during the implementation.
  + Provider should state what are their practice and approach towards the security code design, implementation, and testing.
  + Common industry standard should be considered, for example BSIMM10, BSA, OWASP Application Security Verification Standard, OWASP Testing Guide.
  + Third party code, library and software should be reviewed, assured, and verified they comply with the security requirement as if it’s developed by the provider/vendor.
  + Should there be involvement of handing transaction of credit card, the vendor/provider MUST comply with the latest Payment Card Industry (PCI) Data Security Standard (DSS)
  + Should there be involvement of design payment software, the vendor MUST comply with Payment Card Industry (PCI) Security Standards Council, Secure Software Lifecycle (Secure SLC) Requirements and Assessment Procedures
  + Penetration Testing of the application must be performed by qualified third party penetration tester prior to rollout. Any outstanding vulnerabilities with critical and high must be remediated. Low to medium vulnerabilities should be reviewed and remediate at FTLife’s discretion.

Run time / container Security

* Image Vulnerabilities
* identifying any embedded secrets or malware, and correlating risk to individual image layers ensures developers are building secure image
* Securing the Registry
* Ability stores the image centrally, continuously monitoring registries for any change in vulnerability status
* Container Runtime Protection
* Both network base protection and behavioural baselines for container environments in a normal, secure state to detect and prevent anomalies or attacks.
* Orchestration
* proper access control measures to prevent risks from over-privileged accounts, attacks over the network and unwanted lateral movement
* Protecting the Host OS
* The underneath layer is required to be harden and secured for container to run. Hosts need to be scanned for vulnerabilities, hardened based on specific CIS Benchmarks, and protected against improper access control (Docker commands, SSH commands, sudo commands, etc.) or file tampering.
* Secret management
* API keys, secret and token should be centrally managed or verified or can be revoked centrally.

Security event management

* The application should provide both security logging and audit logging according to FTLife’s standard.
* Security logging should be integrated to FTLife Security information and event management (SIEM)

## 2.3 Delivery Approach

### 2.3.1 Design & Implementation Phase

This project should be developed, implemented & delivered in an Agile way. It has following delivery requirements,

1. **Incremental Deliverables:** Deliverable should be delivered iteratively and it could be in technical deliverable or business deliverable
   1. Technical deliverable should be demonstrated as an enabler of business needs
   2. Business deliverable should be small enough to demonstrate partial business needs are fulfilled such as SVOC.
2. **Scrum Framework:** The design & implementation should be based on FTLife standard Scrum Framework. All scrum ceremonies should be followed including daily scrum, sprint planning, backlog grooming, sprint review & retrospective. Each sprint should define a sprint goal and the whole scrum team works towards the goal.
3. **MVP:** FTLife defines Minimum Viable Product (MVP) as the deliverables of multiple sprints which can deliver one of the approved business needs
4. **Ownership:** All the design documents, architecture diagram, developed source codes and implementation related codes are owned by “FTLife Insurance Company Limited”.
5. **Financial:** The service provider is required to provide implementation costs with detail breakdown for different scopes in different phases.

High level core functions deliverable by phases.

### 2.3.2 Post-Implementation Phase

POS & product engine tools are supported by FTLife internal team and the service provider should ensure all the knowledges are transferred & well-documented for future maintenance. The service provider should provide the following,

1. Design & Implementation documents and deployment documents including design documentations and technical specification
2. Knowledge transfer session & Training to FTLife team

## 2.4 Service Level and Incident Management

Ensure 99.9% monthly uptime for the service availability. On-site support shall be provided within 2 hours for critical incident. Prosper may propose the required resource as option to achieve the required service level.

For any planned maintenance, configuration change and/or software release, the proposer shall give notice to FTLife seven days in advance and should be held on a day which agreed with FTLife in advance.

For critical incident, which means system outage making the system impossible to use, the initial response time should be less than 30 minutes, the proposer shall provide the status update every 1 hour, and resolve the issue / provide a workaround solution within 4 hours

## 2.5 Project Governance Structure

The service provider is required to provide a project team structure that follows the high-level governance structure. There is a Steering Committee to drive the overall direction to the team & help to resolve the escalation from the scrum teams. The service provider should allocate resources in the scrum teams for design & implementation.

# 3. Evaluation / Selection Approach

The evaluation and selection of solution will be undertaken in several stages as set out below:

1. FTLife sends RFP to selected service providers
2. Tender Briefing with Q & A session for service providers would be arranged (if necessary)
3. Service providers submit RFP response (TWO separated documents on technical proposal & financial proposal) to FTLife via FTShare platform – Late submission will not be considered
4. FTLife review the received proposals
5. FTLife follow up and clarify responses with service providers
6. Shortlisted service providers arrange presentation after RFP submission
7. FTLife rank service provider responses based on a FTLife scoring model
8. Short list of potential solutions:

* Reference checks
* Contract negotiation
* Selection of the preferred solution and vendor
* Contracting

We will select a service provider based on a combination of the ability and experience to meet specified requirements, the approach and deliverables, the ability to provide support during implementation and ongoing operation, and the full cost of ownership of the proposed solution.

The response to this RFP and any statements of capability made by the service provider during the evaluation process will be attached to and will form part of the final contract.

This section is included for information purposes only, to indicate the basic considerations of assessing proposals. It must not be assumed to be complete, final or ordered, and is subject to change without notice at the discretion of FTLife.

The general criteria by which proposals will be assessed include:

Evaluation Criteria

* Company profile, experience and management capability
* Operational competence; Experience in providing similar services; Team structure; Quality assurance program; Service level commitments, etc.
* Provision of value-added service
* Understanding FTLife requirements
* Service quality
* Price competitiveness

# 4. Response Format & Guidelines

## 4.1 Response Requirements

Responses to this RFP are to be in the form of a proposal submitted to FTLife in required format no later than the time specified in the email to the service provider. Failure to respond by the specified deadline or not conforming the required format will result in the respondent being excluded from the evaluation.

Responses should include a signed covering document summarizing key elements of the proposal such as the solution offered, timeframe, purchase price / license fees, on-going maintenance fees, costs of modification, implementation cost, and resources proposed to support implementation etc.

The Proposal should contain:

1. A signed with company chop of
   1. Form of Reply
   2. Confirmation Letter for Anti-Collusion
   3. Due Dilligence Questionnaire for Supplier
   4. Supplier Sustainability Questionnaire
2. A fully completed RFP Written Response (please refer to section 5 in this document, and directly provide input under that section) should include:

- Response sections clearly divided into the sections corresponding to the RFP Requirements

- Proposal information should address each numbered requirement items and deliverables

- Divide into technical proposal section and financial proposal section (Please be reminded that there is no pricing information should be stated in the technical proposal)

- Study Approach and methodology

- Proposed solution

- Implementation approach

- Time schedule, milestones, major tasks breakdown and allocated resources

- Price quotation on fixed cost basis, and yearly recurring cost for support and maintenance (if open source components are used, include free upgrade per quarter). Supplement sufficient details of cost breakdown

- Qualifications, relevant experience profiles and roles of involved key personnel

- Proposed onsite and offshore ratio

- Previous client’s reference of similar engagement and comments

1. Samples of deliverables and supporting documents

## 4.2 Additional Information

FTLife is prepared to accept additional information as part of the overall response. However, a response that does not include a fully completed RFP Written Response Document is deemed to be non-complying and will be excluded from the evaluation.

FTLife is not liable for any costs incurred by proposer in the preparation to this RFP and the subsequent evaluation tests.

Proposer should prepare the proposal independently without consultation, communication, agreement or arrangement with any competitors who had been requested by FTLife to submit this proposal. Proposer should understand that the accompanying proposal would be disqualified.

Quotations must be firm without escalation clauses. Proposers who are not prepared to offer a firm quotation must give full details of escalation clause they proposed and must provide such information as necessary to carry out an independent verification of increase requested under such a clause.

Proposer must itemize their proposal to provide individual pricing of all proposed services and components.

## 4.3 Timeline

|  |  |
| --- | --- |
| **Item** | **Tentative Date** |
| RFP issued by FTLife | XX Mar 2023 |
| Supplier acknowledgement to bid | XX Mar 2023 |
| Technical enquiry by service provider | XX Mar 2023 |
| RFP closing date and time | XX Mar 2023 |
| RFP presentation via Zoom by service provider  (By invitation only) | XX Mar 2023 |
| Contract award | XX Apr 2023 |

## 4.4 Format & Return of RFP Response to FTLife

Completed proposal and supporting materials should be in softcopy (TWO separated documents on technical proposal & financial proposal) and upload into the FTShare platform before the RFP Closing Date and Time. The upload link will be sent to the service provider by separate email. Please contact the designated Procurement in charge below for any enquiry of this RFP.

|  |
| --- |
| **XXXXXXXXX**  FTLife Insurance Company Limited  7/F, NEO  123 Hoi Bun Road  Kwun Tong, Kowloon  E-mail: xxx@ftlife.com.hk |

# 5. Written Response

## 5.1 Vendor Information

### 5.1.1 Contact Details

**Vendor Details**

| Trading Name: |  |
| --- | --- |
| Registered Legal name: |  |
| Country of Incorporation: |  |
| Headquarters Address Line 1: |  |
| Line 2: |  |
| Line 3: |  |
| Line 4: |  |
| Line 5: |  |
| Hong Kong Address Line 1: |  |
| Line 2: |  |
| Line 3: |  |
| Line 4: |  |
| Line 5: |  |

**Account Executive responsible for FTLife:**

| Name: |  |
| --- | --- |
| Position: |  |
| Telephone Number: |  |
| E-mail Address: |  |
| Postal Address Line 1: |  |
| Line 2: |  |
| Line 3: |  |
| Line 4: |  |
| Line 5: |  |

**Primary Contact for questions related to this response:**

| Name: |  |
| --- | --- |
| Position: |  |
| Telephone Number: |  |
| E-mail Address: |  |
| Postal Address Line 1: |  |
| Line 2: |  |
| Line 3: |  |
| Line 4: |  |
| Line 5: |  |

**Secondary Contact for questions related to this response:**

| Name: |  |
| --- | --- |
| Position: |  |
| Telephone Number: |  |
| E-mail Address: |  |
| Postal Address Line 1: |  |
| Line 2: |  |
| Line 3: |  |
| Line 4: |  |
| Line 5: |  |

### 5.1.2 Size & Operating Performance

| Date the organization was established: |  |
| --- | --- |
| Date of incorporation: |  |
| Date of last published and fully audited accounts: |  |

Balance Sheet and Profit information for each of the past 5 years must be set out in the tables below. Row headings in each of the tables should be modified to show the actual financial each represented eg if the last year for which published and fully audited accounts are available was 2021 then “Year n” should be modified to read 2021, “Year n-1” should then be modified to read 2020. Each table must also have the “Currency” field at the top right updated for the currency used in each table.

**Balance Sheet Details (000’s) Currency:**

| **Item** | **Year n** | **Year n-1** | **Year n-2** | **Year n-3** | **Year n-4** |
| --- | --- | --- | --- | --- | --- |
| Paid Up Capital |  |  |  |  |  |
| Total Assets |  |  |  |  |  |
| Total Liabilities |  |  |  |  |  |

**Profit Details (000’s) Currency:**

| **Item** | **Year n** | **Year n-1** | **Year n-2** | **Year n-3** | **Year n-4** |
| --- | --- | --- | --- | --- | --- |
| Total Revenues |  |  |  |  |  |
| New Product License Fees |  |  |  |  |  |
| Maintenance Fees |  |  |  |  |  |
| Total profit |  |  |  |  |  |
| Profit Due To Normal Trading |  |  |  |  |  |
| Profit From Extraordinary Items |  |  |  |  |  |

**Location Details**

| Total Number of Worldwide Operating Locations: |  |
| --- | --- |

Details of specific countries of operation, Sales and support offices within each country and support provided by each support office must be set out in the table below.

| **Country of Operation** | **Sales Office Locations** | **Support Office Locations** | **Type of Support Provided** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |

**Staff Numbers**

Details of staff numbers by function and location must be set out in the table below.

| **Location** | **Total Staff** | **Market / Sales** | **App’n Develop.** | **App’n Support** | **Imp. Support** | **Other** |
| --- | --- | --- | --- | --- | --- | --- |
| Worldwide |  |  |  |  |  |  |
| Home Geography |  |  |  |  |  |  |
| Hong Kong |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

### 5.1.3 Current Projects and Resourcing

| **Project** | **Number of Full Time Equivalent Implementation Support Resources Engaged** | | | | | | | | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Sep – Dec 2022** | | | | | | **Jan – Dec 2023** | | | | | | | | | | | |
| **J** | **A** | **S** | **O** | **N** | **D** | **J** | **F** | **M** | **A** | **M** | **J** | **J** | **A** | **S** | **O** | **N** | **D** |
| **1** | x | x | x | x | x | x |  |  |  |  |  |  |  |  |  |  |  |  |
| **2** | x | x | x | x | x | x |  |  |  |  |  |  |  |  |  |  |  |  |
| **3** | x | x | x | x | x | x |  |  |  |  |  |  |  |  |  |  |  |  |
| **4** | x | x | x | x | x | x |  |  |  |  |  |  |  |  |  |  |  |  |
| **5** | x | x | x | x | x | x |  |  |  |  |  |  |  |  |  |  |  |  |
| **….** | x | x | x | x | x | x |  |  |  |  |  |  |  |  |  |  |  |  |
| **N** | x | x | x | x | x | x |  |  |  |  |  |  |  |  |  |  |  |  |

### 5.1.4 Contract Sample

FTLife’s standard contract for this proposal is attached below. Identify specific contract terms to which your response will be in non-compliance.

{Enter Response}



### 5.1.5 Project Reference

Please supplement Project reference

|  |  |
| --- | --- |
| Any services/project/support/maintenance working/providing to FTLife currently?  (if Yes, please supplement with 3 project/services that currently working with/for FTLife) |  |
| Any previous experience with FTLife on related services / products  (if Yes, please supplement with 3 project/services that work with/for FTLife) |  |
| Any previous experience in other FSI companies  (If Yes, please supplement 3 key companies projects) |  |
| Any previous experience in similar size projects  (If Yes, please supplement with 3 projects) |  |

\*\* In case NDA in place you not able to disclose the company/project name. Please specify and share us the company size, primary business nature and the project nature your worked with them

## 5.2 Proposed Solution

### 5.2.1 Reference Sites

The vendor should provide the following details for each reference provided.

| Client Company Name: |  |
| --- | --- |
| Contact Person: |  |
| Contact’s Position and Title: |  |
| Contact’s Telephone Number: |  |
| Contact’s E-mail Address: |  |
| Contacts Address Line 1: |  |
| Line 2: |  |
| Line 3: |  |
| Line 4: |  |
| Line 5: |  |

### 5.2.2 Technical Proposal Section

|  |  |
| --- | --- |
| Section | Item Details |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### 5.2.3 Financial Proposal Section

FTLife’s standard contract for this proposal is attached below. Identify specific contract terms to which your response will be in non-compliance.

{Enter Response}



### 5.2.4 Demonstrations / Presentations

[Please fill in Demonstrations / Presentations info with attachments.]

### 5.2.5 Sample Documents / Outputs

[Please attach all relevant Sample Documents / Output as supporting.]

### 5.2.6 Implementation Approach

[Please fill in Implementation Approach.]

# 6. Appendix

# 7. Confidentiality Statement

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