PROGRAM AGREEMENT

THIS AGREEMENT is between **CANOE PROCUREMENT GROUP OF CANADA**, a tradename of the Rural Municipalities of Alberta, a corporation incorporated pursuant to the laws of Alberta ("**CANOE**") and:

Supplier Legal Name:	9423-6155 Québec Inc. (EQTech Solutions)
Supplier Corporate Jurisdiction:	4605 Boulevard Lapinière Ste 350, Brossard, QC J4Z 3T5
	(the "**Supplier**"), as of
Date of Agreement:	May 1, 2026 regarding
RFP No.	CAN-2026-002
RFP Title	Implementation Services for Enterprise Resource Planning (ERP) Software
	(the "**RFP**").

BACKGROUND

A. Canoe is a public agency serving as a national municipal contracting agency for its Members, and in that capacity issued the RFP for the purchase of goods and/or services.

B. The Supplier is engaged in the business of selling some or all of those goods and/or services, and responded to the RFP.

C. Canoe wishes to enter into an agreement with the Supplier for the purchase of goods and/or services by Members, pursuant to a purchase program administered by Canoe.

D. The Parties wish to set out the terms and conditions upon which those purchases will occur, and under which the purchase program will be administered.

NOW THEREFORE, in consideration of the premises and the mutual covenants herein contained and of other good and valuable consideration (the receipt and sufficiency of which are hereby acknowledged by each Party), the Parties hereby agree as follows:

ARTICLE 1
INTERPRETATION

1.1 Definitions

In this Agreement the following terms have the corresponding meanings.

"**Administrative Fee**" means the fee paid by the Supplier to Canoe as described in this agreement (Administrative Fee) and protected under FOIPPA.

11.11 Further Assurances

Each Party will take all necessary actions, obtain all necessary consents, file all necessary registrations and execute and deliver all necessary documents reasonably required to give effect to this Agreement.

11.12 Counterparts

This Agreement may be executed in any number of counterparts. Either Party may send a copy of its executed counterpart to the other Party by Electronic Transmission instead of delivering a signed original of that counterpart. Each executed counterpart (including each copy sent by Electronic Transmission) will be deemed to be an original; all executed counterparts taken together will constitute one agreement.

IN WITNESS WHEREOF the Parties have executed this Agreement as of the date first written above.

CANOE PROCUREMENT GROUP OF CANADA

By: Tyler Hannemann (May 22, 2026 09:05:19 MDT)

Name: Tyler Hannemann
Title: General Manager

By: Stéphanie Dion

Name: Stéphanie Dion
Title: Manager of Procurement

Supplier Legal Name: 9423-6155 Québec Inc. (EQTech Solutions)

By: Eric Zhuang (May 14, 2026 16:38:15 EDT)

Name: Eric Zhuang
Title: Co-Founder / Client-Advisory Consultant

SCHEDULE "A"

RFP PARTICULARS

PART B – RFP PARTICULARS

A. THE “DELIVERABLES”

SOLUTIONS-BASED SOLICITATION

This solicitation process is structured as a solutions-based solicitation, indicating that Canoe is seeking services aligned with the general requirements outlined in the scope of this RFP and consistent with widely accepted industry standards.

The objective of this RFP is to identify and engage qualified suppliers capable of delivering Implementation Services for Public Sector Enterprise Resource Planning (ERP) Software to support the operational needs of municipalities, cities, provincial governments, academic institutions and healthcare organizations. Proponents may include related services provided these are complementary to the proposed commodities.

B. REQUESTED SERVICES

Canoe is seeking proposals from qualified suppliers for Implementation Services for ERP Software.

The Proponent will be required to provide professional services with the technical expertise and management required to modernize Canoe Member’s digital infrastructure while updating business functions to improve data accuracy and operational efficiency.

Canoe has engaged with over 70 public agencies in preparation of this RFP in Q4 of 2025.

Many are users of legacy platforms which will no longer offer mainstream support within the next couple years.

Core Service Categories

- **Vendor selection support:** As required, assist Canoe Members in identifying the most suitable ERP software before the implementation begins. The proponent will act as an expert advisor to guide Members through a structured needs assessment process. This service includes gathering detailed business requirements from stakeholders, create the necessary technical specifications, coordinate software demonstrations and perform a fit gap analysis to identify system limitations, etc.

- **ERP solution roadmap:** create and maintain an ERP solution roadmap to align with Canoe Members’ business objectives and needs including a strategic roadmap, stakeholder engagement, implementation timeline, milestones, etc.

- **Business process engineering:** evaluate existing operations to identify inefficiencies. They redesign workflows to align with industry best practices and the functional capabilities of the ERP platform.

- **Technical architecture and configuration:** design the system environment. This includes configuring software modules, developing integrations with external applications, and ensuring the platform meets Canadian cybersecurity and data residency standards as required by Canoe Members.

- **Data governance and migration:** execute a comprehensive data strategy including extract, clean, and validate legacy data to ensure a seamless transition into the new database architecture without compromising data integrity.

- **Organizational change management:** deliver structured training programs and communication plans to minimize operational downtime and manage the transition for personnel. User adoption is critical for Canoe Members.

- **Quality assurance and deployment:** conduct end-to-end system testing and User Acceptance Testing (UAT) as well as manage the final deployment to the live environment and provide immediate technical stabilization.

- **Post-Deployment technical support:** provide ongoing technical maintenance and help desk services following the system launch. This includes incident management, software patching, and performance monitoring to ensure the system remains stable and secure.

Services offered:

Proponents are expected to provide a broad selection of services at reduced prices, offering better value than they typically would to federal and provincial governments, municipalities, cities, academic institutions and school boards. These services are designed to support or Canoe Members with the implementation of their ERP solution.

Canoe prefers suppliers that provide a sole source of responsibility for the services provided under a resulting master agreement. If a proponent is including services of its subsidiary entities, the proponent must also identify all included subsidiaries in its proposal. If proponent requires the use of subcontractors to provide the services, the proposal must address how the services will be provided to Members, and describe the network of subcontractors that will be available to serve Members under a resulting Program Agreement.

It is expected that proponents have knowledge of all applicable industry standards, laws, and regulations and possess an ability to market and distribute the services to Members.

ERP Software solutions available to Canoe Members:

Canoe Members currently have access to Microsoft software solutions under its technology program. https://canoeprocurement.ca/program/technology-program/

Canoe currently has a request for proposal for ERP Software Solutions which is available at https://canoe.bidsandtenders.ca/Module/Tenders/en/Tender/Detail/e0b77942-3a19-4910-8762-b7cb739d2264 where OEMs interested are listed.

Canoe expects to award contracts to multiple software OEMs as part of RFP CAN-2026-001 for the following types of ERP software solutions:

Model 1. Integrated ERP Suite solution

A single, unified Enterprise Resource Planning system that delivers the core administrative functions—finance, HR/payroll, procurement, budgeting, taxation, utilities, reporting—within one integrated platform and one data model. These systems are designed to operate as a cohesive whole rather than as combined standalone applications.

Model 2. Best-of-Breed solutions

An ERP solution delivery approach where the ERP platform provides core administrative functions and specialized third-party applications are used for specific business needs. The ERP must expose open, well-documented APIs to support secure, reliable integration, and must remain the primary system of record for administrative data.

Model 3. Specialty Municipal Systems solutions

Smaller-scope municipal systems that provide important but limited administrative functionality (such as AP automation, taxation, utility billing, or legacy finance functions) but do not constitute a full ERP solution as described above. Software for emergency management, land-use planning, permitting, GIS or inspections are not included in this category.

1. Utilization of the contract – Canoe members

Canoe Members may choose but are not obligated to utilise the services during the term of the agreement. There is no minimum guarantee of usage.

2. Requirements

Proponents are expected to submit a comprehensive proposal that clearly demonstrates the overall best value in alignment with the scope outlined in this Solicitation. The evaluation of best value will encompass, but is not limited to, consideration of the following components within your RFP submission:

- Competitive pricing across the span of services offered beyond a defined service offering.
- Proponents must specify any costs that are excluded from the pricing of their proposed product or service. These might include expenses such as installation, setup, required training, or initial inspections. In addition, proponents should explain any distinctive distribution or delivery options that are part of the proposal.
- Our Members frequently inquire about several aspects, including: the speed and cost of accessing services, procedures for service access, establishing their own review processes, potential location constraints, user-friendliness of service access, support for the local economy, compliance with trade agreements, advantages for their entities when utilizing this contract, availability of knowledgeable contacts for inquiries, commitment to customer care, expected service quality, and potential impacts on their operations and financial outcomes.

To support an industry leading value-based solution, Canoe is requesting that all interested proponents provide a thorough and comprehensive description of their ability to provide the Deliverables when answering the specification questionnaires in the Procurement Portal.

D. MANDATORY SUBMISSION REQUIREMENTS

1. Submission and Specification Questionnaires

Proponents must answer specification questionnaires directly into Canoe's Procurement Portal. Proposal materials should be prepared and submitted in accordance with the instructions in the Procurement Portal, including any maximum upload file size.

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided.

2. Pricing

Each proposal must include pricing information that complies with the instructions set out in the Procurement Portal.

E. MANDATORY TECHNICAL REQUIREMENTS

i. The Proponent must meet the following mandatory requirement(s). Proponents who do not meet the mandatory technical requirement(s) will be deemed non-compliant and their proposal will not be evaluated further.

ii.

Mandatory Requirements – All Proponents	**Required Documentation**
Information Security. The proponent must hold a valid ISO 27001 certification or equivalent international standard, or provide a current SOC 2 Type II or NIST 800-53 audit report or CyberSecure Canada Certification or Canadian Program for Cyber Security Certification (CPCSC) Level 1 or 2 certification.	Attach a copy of the certificate or the executive summary of the SOC 2 or NIST 800-53 report in the procurement portal.
Mandatory Requirement - Software Partnership	**Required Documentation**
Proponent who claim to be certified implementation partner or have certification for the ERP software(s) solutions they include in their proposal response must provide proof of certification from the software OEM(s) or provide evidence of an equivalent partnership status with a comparable cloud service provider or technology vendor.	Attach a formal letter or certificate from the software manufacturer or service provide confirming partner/certification status in the procurement portal.

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided in the Procurement Portal.

F. PRE-CONDITIONS OF AWARD

- Submission of proof of insurance
- Satisfactory reference check if required by Canoe

G. EVALUATION CRITERIA

The following sets out the categories, weightings, and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Proponents must provide their response in Canoe’s procurement portal.

Non-Price Rated Criteria Category	Points	Minimum points
Experience -Public sector experience and expertise with ERP implementation services	20	15
Program offering -ERP Software solution and selection process -Member access to program offering -Scalability and staffing -Technical Support	15	10
Risk identification and mitigation plan -Proactive risk mitigation and reduction of impact to budget, timelines, scope	15	11
Situational questions	15	11
Engagement, sales, marketing and internal training plan	10	7
Subtotal	75	54
Pricing Classification -Discounts offered	25	
Total Points	100	

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided in the Procurement Portal.

H. PRICE

Pricing is worth 25 points of the total score.

Instructions on How to Provide Pricing

(a) Proponents should submit their pricing information electronically within the Procurement Portal.

(b) Rates must be provided in Canadian funds, exclusive of all applicable duties and taxes.

(c) Unless otherwise indicated in the requested pricing information, rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees, duties, tariffs or other charges required by law.

I. AWARD

There are 3 classifications of award:

Group 1. Partners: All proponents within 8 points of highest score.

Group 2. Non-partners: all proponents within 8 points of highest score.

Competitive Range

Canoe intends to award contracts to all proponents within the Competitive Range. This method ensures Canoe Members have access to high quality vendors and a diverse choice of solutions to meet their needs.

Canoe will rank all proponents by their total score. The Competitive Range includes the highest-ranked proponent and all subsequent proponents whose total scores fall within a 8% difference of the highest score. On a 100-point scale, the margin is 8 points below the top score.

If fewer than four proponents fall within the initial 8% range, Canoe will expand the range to include the highest-ranked proponents. In this case, the score of the second last-ranked proponent becomes the new minimum score for that category.

Canoe reserves the right to limit the Competitive Range to ensure contract quality and management efficiency. Canoe will exclude any proponent whose score is more than 8 points below the top-ranked proponent unless that proponent is needed to meet the minimum award requirements.

[End of Part B]

SCHEDULE "B"

SUPPLIER RESPONSE TO THE RFP

CAN-2026-002 - Implementation Services for Enterprise Resource Planning (ERP) Software

Opening Date: February 11, 2026 5:15 PM

Closing Date: March 24, 2026 3:00 PM

Vendor Details

Company Name:	9423-6155 Québec Inc.
Does your company conduct business under any other name? If yes, please state:	
Address:	
Contact:	Eric Zhuang
Email:	ezhuang@eqtechsolutions.com
Phone:	514-802-8892
Fax:	514-802-8892
HST#:	1227762396,711492074

Submission Details

Created On:	Tuesday March 10, 2026 22:41:17
Submitted On:	Monday March 23, 2026 16:25:32
Submitted By:	Eric Zhuang
Email:	ezhuang@eqtechsolutions.com
Transaction #:	ed85f931-0a13-4378-a3c4-7e5f09b2d37c
Submitter's IP Address:	147.243.254.176

Proponents must review and complete the requirement lists and questionnaires as part of their submission.

Corporate Profile

Line Item	Question	Response *
1	Proponent Legal Name (and applicable d/b/a if any):	9423-6155 Québec Inc. (EQTech Solutions)
2	Proponent Address:	
3	Proponent website address:	https://www.eqtechsolutions.com/
4	Proponent's Authorized Representative (name, title, email address) (The representative must have authority to sign on behalf of the Proponent):	Name: Eric Zhuang Title: Co-Founder / Client-Advisory Consultant Email: ezhuang@eqtechsolutions.com Phone: +1-514-802-8892
5	Proponent's primary contact for this proposal (name title address email address):	Name: Eric Zhuang Title: Co-Founder / Client-Advisory Consultant Email: ezhuang@eqtechsolutions.com
6	Proponent's other contacts for this proposal if any (name title address email address & phone):	Name: Quan Zhuang Title: Co-Founder / ERP and CRM Solutions Architect Email: qzhuang@eqtechsolutions.com Phone: +1-514-566-3822
7	Proponent GST registration number:	711492074 RT0001
8	If the Proponent is representing a consortium, each member of that consortium.	N/A
9	Provide a brief history of your company, including your company's core values, business philosophy, and longevity in the industry relating to this solicitation.	EQTech Solutions is a Quebec-based technology consulting firm founded in 2020 and focused on ERP implementation, CRM, advisory, and digital transformation services. We help organizations modernize their operations through practical, business-focused solutions, with a strong specialization in Microsoft Dynamics 365 Business Central, Microsoft Dynamics 365 Sales, and the broader Microsoft ecosystem. Since our founding, our mission has been to help clients improve visibility, strengthen processes, and adopt scalable systems that support long-term growth and operational efficiency. Our vision is to become a leader in successful digital transformation across every project EQTech Solutions undertakes. Today, we serve clients across North America and support organizations in a range of industries through implementation, optimization, and transformation initiatives. Since inception, EQTech Solutions has maintained a strong delivery track record, and all projects undertaken by the firm have been successfully delivered within the agreed budget and promised timeline. Our core values are rooted in integrity, accountability, collaboration, and continuous improvement. We believe technology should serve the business, not the other way around. For that reason, our business philosophy is centered on listening first, understanding each client's operational realities, and delivering solutions that are pragmatic, sustainable, and aligned with their goals. We take a relationship-driven approach and aim to act as a trusted advisor throughout the full lifecycle of an initiative, from planning and roadmap development to implementation, training, and ongoing support. EQTech Solutions is also recognized as a Certified Digital Advisor under the Canadian Digital Adoption Program, reflecting our experience in helping businesses assess needs, plan transformation initiatives, and move forward with confidence. While EQTech Solutions is a growing firm, our team brings over 80 years of combined experience in ERP consulting, finance, process improvement, reporting, change enablement, and solution delivery. This includes extensive experience with Microsoft Dynamics migrations, including transitions from Microsoft Dynamics GP and Microsoft Dynamics NAV (Navision) to modern cloud-based platforms. This experience is directly relevant to this solicitation, particularly where successful delivery depends on implementation services, advisory support, business process alignment, data migration, training, and post-deployment support. Our approach combines responsiveness and agility with the structure, professionalism, and client focus required to support organizations across Canada and North America.
10	Where is your headquarters located?	
11	Do you have 250 or more full time employees in Canada?	No
12	Provide all "Suspension or Debarment" from public entities in Canada your organisation is currently subject to.	N/A

Bill S-211 declaration

Please note that the response to the information is being collected as data collation for internal use only. The response provided has no bearing on the ability for Proponents to respond to this RFP.

Line Item	Bill S-211	Answer *
1	Does the Proponent identify itself as an "entity" as defined under the Fighting Against Forced Labour and Child Labour in Supply Chains Act or "Bill S211"? As per Bill S211 an "Entity" means a corporation or a trust, partnership or other unincorporated organization that (a) is listed on a stock exchange in Canada; (b) has a place of business in Canada, does business in Canada or has assets in Canada and that, based on its consolidated financial statements, meets at least two of the following conditions for at least one of its two most recent financial years: (i) it has at least $20 million in assets, (ii) it has generated at least $40 million in revenue, and (iii) it employs an average of at least 250 employees; or (c) is prescribed by regulations. Please note that the response to the information is being collected as data collation for internal use only. The response provided either yes or no has no bearing on the ability for Proponents to respond to this RFP.	○ Yes ◉ No

Building Ontario Businesses Initiative Act (BOBIA) - declaration

Please note that the response to the information is being collected as data collation for internal use only. The response provided has no bearing on the ability for Proponents to respond to this RFP.

Line Item	Building Ontario Businesses Initiative Act	Answer *
1	Is your business a supplier, manufacturer or distributor of any business structure that conducts its activities on a permanent basis in Ontario, as defined by the Building Ontario Businesses Initiative Act? Does your business either, i. has its headquarters or main office in Ontario, or ii. has at least 250 full-time employees in Ontario at the time of the applicable procurement process.	○ Yes ◉ No

Geographical coverage for offering

Identify the geographical locations included in your offering. While Canoe members are nation wide, **Proponents can select to serve a defined geographical area based on their capabilities.**

Line Item	Province/Territory	Do you currently offer services in this area? *	List locations serving this province
1	Alberta	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
2	British-Columbia	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
3	New-Brunswick	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
4	Manitoba	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
5	Newfoundland and Labrador	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
6	Northwest Territories	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
7	Nova-Scotia	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
8	Nunavut	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
9	Ontario	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
10	Prince Edward Island	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
11	Québec	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
12	Saskatchewan	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada
13	Yukon	● Yes ○ No	Brossard, Québec, Canada or Calgary, Alberta, Canada

Experience - Public Sector

Describe your experience with implementing ERP softwares with public sector clients

Question	Reponse *
Describe your experience providing ERP implementation services for public sector entities.	EQTech Solutions has experience supporting public sector and broader publicly funded organizations with ERP modernization, implementation planning, procurement support, and solution delivery services. Our team brings over 80 years of combined experience in ERP consulting, finance, process improvement, reporting, change enablement, and implementation delivery, with strong specialization in Microsoft Dynamics 365 Business Central and Microsoft Dynamics 365 Sales. We also bring extensive experience supporting migrations from legacy Microsoft platforms, including Microsoft Dynamics GP and Microsoft Dynamics NAV (Navision), to modern cloud-based ERP solutions. Our experience is aligned with the needs of public sector organizations, including academic institutions and social service agencies, Crown-related entities, and other publicly funded bodies. In these environments, our approach emphasizes structured governance, stakeholder coordination, business process alignment, data migration planning, training, risk management, and post-go-live support. We understand that public sector ERP initiatives require accountability, transparency, documentation, and adaptability across multiple stakeholder groups, and we structure our delivery approach accordingly. Example of Public Sector Entities: -Ontario, public sector regulatory organization, approximately 250 employees -Ontario/Federal, publicly funded research and innovation organization, approximately 150 employees -Ontario, not-for-profit media and accessibility organization, approximately 125 employees
Describe the services you offer public sector clients for ERP implementation.	-ERP requirements gathering and discovery -ERP vendor selection support -ERP roadmap and implementation planning -Business process review and process redesign -Solution architecture and functional design -System configuration and customization support -Integration planning and integration delivery -Data migration, data cleansing, and data validation -Testing support, including user acceptance testing -Training and knowledge transfer -Organizational change management support -Deployment and go-live support -Post-go-live stabilization and ongoing support -Reporting, dashboards, and operational visibility improvements -Legacy system modernization, including migrations from Microsoft Dynamics GP and Microsoft Dynamics NAV (Navision) and other platform to modern cloud-based platform (Microsoft Dynamics 365 Business Central) -Project governance, risk management, issue tracking, and stakeholder coordination throughout the implementation lifecycle
Detail your experience managing multi-jurisdictional or group purchasing contracts.	EQTech Solutions has experience supporting procurement-driven ERP engagements that involve multiple jurisdictions, diverse stakeholder groups, and varying contractual requirements. We currently serve clients across North America and understand the importance of adapting delivery to different governance models, approval structures, security requirements, and member-specific operational needs. Our team manages these engagements through structured project governance, detailed scope and statement of work definition, proactive risk and issue management, change control, regular stakeholder communication, and clear executive reporting. We are comfortable working within group purchasing style environments where participating organizations may access services through different procurement mechanisms, including purchase orders, participating addenda, and member-specific transaction documents. We understand the need to remain flexible while still maintaining consistency, accountability, and compliance across the engagement lifecycle. Our delivery model is designed to support both remote and on-site services across jurisdictions, while tailoring implementation planning, contracting, communications, and support structures to the needs of each client organization. This allows us to support public sector entities of different sizes and maturity levels in a practical, well-governed, and scalable manner.
List the current third party certifications your firm has related to ERP implementations.	1) Certified Digital Advisor under the Canadian Digital Adoption Program (CDAP) 2) Microsoft Cloud Solution Provider (CSP) Program, Active Authorization under the Microsoft Partner Agreement (MPA) 3) Microsoft Certifications (Business Central, Fundamentals, Power Platform)
List anything else you would like to include as part of your offering.	-Strong specialization in Microsoft Dynamics 365 Business Central and Microsoft Dynamics 365 Sales -Extensive experience supporting migrations from Microsoft Dynamics GP and Microsoft Dynamics NAV (Navision) to modern cloud-based platforms -Certified Digital Advisor under the Canadian Digital Adoption Program (CDAP) -Microsoft Cloud Solution Provider (CSP) Program authorization under the Microsoft Partner Agreement -Service delivery experience across North America -Bilingual service capability in English and French -Flexible delivery model with remote services and on-site support as required -Experience working in structured, governance-driven environments with clear documentation, stakeholder coordination, and risk management

ERP Software Public Sector Implementation Expertise

Provide the requested information from implementations done with your public sector clients only.

Canoe will not evaluate the quantity of software solutions a Vendor can implement. Canoe will evaluate the Vendor's demonstrated experience with completed implementations.

Name of ERP Software *	Partner status? *	Total number of completed implementations *	Total number of implementations in progress *	Name and size of public sector client for the latest 3 completed implementations *
Microsoft Dynamics 365 Business Central (ERP)	◉ Yes ○ No	35	7	-Ontario, public sector regulatory organization, approximately 250 employees -Ontario/Federal, publicly funded research and innovation organization, approximately 150 employees -Ontario, not-for-profit media and accessibility organization, approximately 125 employees

Program offering

Describe your program offering.

Question	Reponse *
Provide a high level profile of your company.	EQTech Solutions is a Quebec-based technology consulting firm specializing in ERP, CRM, and digital transformation services. We help organizations modernize operations through practical, business-focused solutions, with strong specialization in Microsoft Dynamics 365 Business Central, Microsoft Dynamics 365 Sales, and the broader Microsoft ecosystem. We currently support clients across North America and bring more than 80 years of combined experience across our team in ERP consulting, finance, process improvement, reporting, change enablement, and solution delivery. Our approach is rooted in integrity, accountability, collaboration, and continuous improvement. We believe technology should serve the business, not the other way around. As a result, we focus on understanding each client's operational realities, designing fit-for-purpose solutions, and delivering implementations that are pragmatic, scalable, and aligned with business goals. EQTech Solutions is also a Certified Digital Advisor under the Canadian Digital Adoption Program and a Microsoft Cloud Solution Provider.
Describe the ERP implementation services you offer public sector clients.	EQTech Solutions offers end-to-end ERP implementation services for public sector and broader publicly funded organizations, including: -requirements gathering and business needs assessment -vendor selection support and fit-gap analysis -ERP roadmap and implementation planning -business process review and redesign -solution architecture and functional design -system configuration and integration planning -data migration, cleansing, validation, and reconciliation -testing support, including conference room pilot, system testing, and UAT -training, knowledge transfer, and user enablement -organizational change management and communications support -deployment, cutover, and go-live support -hypercare, stabilization, and ongoing post-deployment support
Describe your standard implementation methodology, include typical key milestones.	EQTech Solutions uses a structured implementation methodology that combines disciplined project governance with an Agile, iterative delivery approach. Our methodology is designed to reduce implementation risk, accelerate user feedback, and ensure the solution remains aligned with the client's operational needs throughout the project lifecycle. Rather than relying on a fully linear delivery model, we use phased planning, fit-gap validation, iterative configuration and build, conference room pilot style playbacks, controlled testing cycles, data migration rehearsals, training, cutover preparation, and post-go-live stabilization. Typical key milestones include: 1. Project Initiation and Mobilization: Project kickoff, governance structure, stakeholder alignment, scope confirmation, project plan finalization, and environment preparation. 2. Discovery and Fit-Gap Analysis: Review of current business processes, requirements validation, legacy system assessment, reporting needs, integration points, and identification of gaps between business needs and the proposed solution. 3. Solution Design: Future-state process design, functional design decisions, configuration strategy, data migration planning, security and role planning, and validation of implementation priorities. 4. Iterative Build and Playback Cycles: Configuration, approved development, integration setup, and iterative playbacks or conference room pilot sessions to validate business processes early using realistic scenarios and sample data. 5. Data Migration and Conversion Testing: Data extraction, cleansing, mapping, mock migrations, reconciliation, and validation of converted data before production deployment. 6. System Testing and User Acceptance Testing: End-to-end testing of configured processes, integrations, controls, reports, and migrated data, followed by user acceptance testing and issue resolution. 7. Training and Go-Live Readiness: Delivery of role-based training, knowledge transfer, cutover planning, readiness review, and final confirmation that users, data, and support processes are prepared for deployment. 8. Go-Live and Production Transition: Execution of cutover activities, production deployment, live user support, issue monitoring, and transition into the operational environment. 9. Post-Go-Live Stabilization and Support: Hypercare support, resolution of early production issues, user reinforcement, final documentation handoff, and transition to ongoing support and continuous improvement. This methodology allows EQTech Solutions to scale its delivery approach based on the size, complexity, and maturity of each client, while maintaining clear governance, regular communication, and ongoing validation throughout the implementation.
Explain how you adapt your methodology for different member size and complexity of projects.	EQTech Solutions adapts its implementation methodology based on the size of the organization, the complexity of the business processes, the number of users and entities involved, the volume and quality of legacy data, the number of required integrations, regulatory or governance considerations, and the internal capacity of the client team. For smaller or lower-complexity projects, we use a leaner governance structure, shorter workshop cycles, simplified documentation, and a more focused milestone plan to accelerate delivery while maintaining control and quality. For larger or more complex projects, we increase the depth of discovery, expand stakeholder engagement, formalize governance cadences, strengthen risk and change control processes, and introduce more detailed testing, training, and deployment planning. We also adapt our delivery model based on the client's internal maturity and availability. Where a client has a strong internal project team, we can take a more advisory-led approach. Where the client requires more direct support, we provide a more full-service delivery model across design, migration, testing, training, and post-go-live stabilization. This flexible approach allows us to maintain a consistent methodology while tailoring execution to the realities of each project.
Describe your approach to data migration for legacy systems.	Our approach to data migration is structured, iterative, and designed to protect data integrity while minimizing business disruption. We begin with a data assessment to identify source systems, data owners, migration scope, data dependencies, retention requirements, and key data quality issues. This is followed by detailed data mapping, transformation planning, cleansing activities, and validation of what data will be migrated, archived, or excluded. We then execute staged migration cycles that typically include extraction, cleansing, normalization, mapping, mock conversions, reconciliation, user validation, and sign-off. Multiple test migrations are performed before production cutover so that issues can be identified and resolved early. Our final migration activities include cutover planning, defined responsibilities, post-load validation, balancing and reconciliation checks, and production readiness confirmation. EQTech Solutions also brings extensive experience supporting migrations from Microsoft Dynamics GP and Microsoft Dynamics NAV (Navision) to modern cloud-based platforms.
Describe your project management office structure and the tools you use to track progress and share updates with clients.	Our PMO structure is designed to provide clear accountability, visibility, and control throughout the implementation lifecycle. A typical project team includes an executive sponsor, engagement lead, project manager, solution architect, functional consultants, technical consultants, data migration lead, training and change support resources, and post-go-live support personnel as required. Governance is typically organized across executive steering, project management, and workstream-level coordination to ensure clear decision-making, timely escalation, and consistent alignment with project objectives. To manage progress and keep clients informed, we use a structured communication and reporting cadence throughout the project. This typically includes weekly scrum meetings with the core delivery team, stand-up meetings every two weeks with key stakeholders, and regular steering or management reviews as needed based on the size and complexity of the project. We use Azure DevOps to manage tasks, issues, testing activities, and delivery progress, and Microsoft Project Planner to track timelines, milestones, dependencies, and overall schedule performance. Clients receive weekly project reports that provide a clear view of project health, effort spent, top risks, overall advancement, completed activities, and next steps. We also share meeting notes, milestone updates, action items, and decision summaries to ensure transparency and maintain momentum. This approach helps clients stay closely informed on project status while giving both teams a practical framework for tracking progress, managing priorities, and resolving issues in a timely manner.
Describe how you handle dispute resolution during an active implementation.	Our approach to dispute resolution is centered on early identification, transparent communication, and timely escalation. During an active implementation, concerns are first addressed at the working team level through direct discussion between the project manager, relevant workstream leads, and the client stakeholders involved. The issue is documented, reviewed for root cause and impact, and paired with recommended resolution options. Our goal is always to resolve matters quickly and practically before they affect project momentum. If a matter cannot be resolved at the operational level, it is escalated through the agreed governance structure, typically to the project sponsors or executive stakeholders on both sides. Throughout the process, we maintain clear documentation of decisions, actions, and next steps, and we continue progressing undisputed work wherever possible. This approach helps preserve trust, reduce disruption, and support fair and efficient resolution.

Detail your quality assurance and testing protocols before system go live.	Our quality assurance approach begins early in the implementation and continues through design, configuration, migration, testing, and deployment. Before go live, we validate not only the configured solution, but also the underlying business processes, security roles, reports, workflows, integrations, and migrated data. Quality assurance is treated as an ongoing discipline rather than a single testing event at the end of the project. Our standard testing protocol typically includes solution design review, configuration validation, system testing, integration testing, end-to-end business scenario testing, data migration validation, and user acceptance testing. Defects are logged, prioritized, reviewed with the client, retested after correction, and tracked through to closure. Prior to go live, we also complete cutover planning, final readiness checks (go/no-go), and confirmation that critical defects have been resolved, key business processes have been validated, and migrated data has met reconciliation thresholds.
Describe your strategy for organizational change management and user adoption. Also describe how you measure user adoption.	Our organizational change management strategy is focused on helping users understand the purpose of the change, prepare for new ways of working, and build confidence in the new system before and after deployment. We begin by identifying stakeholder groups, change impacts, training needs, and communication requirements. Based on this assessment, we develop a practical change support plan that may include stakeholder engagement, communication planning, super-user participation, role-based enablement, and post-go-live support. We measure user adoption using both quantitative and qualitative indicators. These may include training completion rates, user participation in testing, readiness assessment results, number and type of support requests after go live, usage of key business processes, workflow compliance, feedback from super-users and business leads, and the time required to stabilize operations after deployment. This allows us to identify adoption gaps early and reinforce support where needed.
List the training delivery methods you offer, as well as the customized training tools for Members.	EQTech Solutions offers a flexible range of training delivery methods to support different project sizes, user groups, and delivery models. These include instructor-led virtual training, instructor-led on-site training, train-the-trainer sessions, role-based end-user training, administrator and super-user training, process walkthrough workshops, refresher sessions, post-go-live office hours, and recorded sessions for future replay or onboarding. Customized training tools may include role-based training guides, quick reference sheets, process maps, workflow guides, scenario-based exercises, sample transaction scripts, recorded demonstrations, FAQ documents, support playbooks, readiness checklists, and post-go-live reinforcement materials. Our goal is to ensure training reflects the client's actual business processes, security roles, and day-to-day operational scenarios so that users receive practical and relevant guidance.
Explain how you assess user readiness before the system goes live.	We assess user readiness through a structured review of people, process, data, and support preparedness before go live. This includes confirming that key users have completed training, business stakeholders have participated in testing, critical workflows have been validated, migrated data has been reviewed, support processes are in place, and cutover responsibilities are clearly assigned. Our readiness assessment typically considers training completion, user acceptance testing sign-off, open issue status, support team preparedness, data validation results, stakeholder confidence, and business owner confirmation. Where appropriate, we also conduct readiness surveys or targeted discussions with super-users and department leads. If gaps are identified, we recommend corrective actions before go live to reduce disruption and improve adoption.
Explain how you ensure resource continuity throughout the duration of a project.	We ensure resource continuity through careful project staffing, clear role definition, documentation discipline, and planned backup coverage for key functions. Core project roles are identified at the outset, responsibilities are clearly assigned, and project knowledge is maintained through meeting notes, solution design documents, decision summaries, configuration records, and structured handoff practices. This helps reduce dependency on any single individual and supports continuity throughout the project lifecycle. We also maintain internal oversight of project staffing and encourage knowledge sharing across the delivery team so that critical context is preserved even as project demands evolve. Our goal is to ensure continuity not only in named resources, but also in project knowledge, delivery accountability, and client-facing consistency.
Describe your process for replacing a team member if a member requests a change.	If a client requests a change to a project team member, we address the matter promptly, professionally, and with the goal of minimizing disruption to the implementation. We first confirm the reason for the request, review the role requirements, and identify a replacement with the appropriate skills, project knowledge, and level of experience. Once confirmed, we prepare a structured transition plan to support continuity. This process typically includes review of project documentation, internal knowledge transfer, overlap or shadowing where possible, and transition meetings with the client to confirm the new team member's responsibilities and next steps. Our objective is to maintain delivery momentum, preserve stakeholder confidence, and ensure that the transition is smooth and well managed.
Detail your experience managing multi-jurisdictional or group purchasing contracts.	EQTech Solutions currently serves clients across North America and is accustomed to supporting engagements where contracting structures, approval processes, governance expectations, security requirements, and stakeholder groups may vary by organization. Our delivery model is designed to support both remote and on-site service delivery across jurisdictions while maintaining consistent governance, scope control, communication, and quality management. We understand that multi-jurisdictional and group purchasing environments often require flexibility in how services are engaged, documented, and delivered. This may include client-specific statements of work, varying internal approvals, and additional contractual or reporting requirements. Our experience in procurement-driven and multi-stakeholder environments has equipped us to manage this complexity through clear governance, structured communication, disciplined scope management, and practical delivery planning.
List anything else you would like to include as part of your offering which is complementary to the main offering of ERP Implementation Services?	-Bilingual service capability in English and French -Certified Digital Advisor under the Canadian Digital Adoption Program -Strong specialization in Microsoft Dynamics 365 Business Central and Microsoft Dynamics 365 Sales -Ability to support clients from early planning and solution selection through implementation, training, optimization, and ongoing support

ERP software solution selection support process

Question	Answer *
Describe your process for conducting a business needs assessment for a public sector member.	EQTech Solutions conducts business needs assessments through a structured, collaborative process designed to understand the member's operational priorities, current challenges, future objectives, and governance requirements. Our process typically begins with stakeholder interviews and discovery workshops involving executive sponsors, department leads, operational users, finance teams, IT, and other key participants. Through these sessions, we document current-state processes, identify pain points, review reporting and compliance requirements, assess existing systems and integrations, and clarify future-state goals. Following discovery, we consolidate findings into a structured needs assessment that defines business requirements, functional priorities, technical considerations, implementation constraints, and decision criteria. We also identify opportunities for process improvement, standardization, automation, and risk reduction. This output provides the foundation for solution evaluation, roadmap planning, technical specification development, and overall project scoping. Our approach is designed to support transparent decision-making and ensure that the recommended ERP direction is aligned with the member's operational realities and long-term objectives.
Explain how you develop technical specifications for an ERP software.	EQTech Solutions develops technical specifications by translating business requirements into clear, structured solution requirements that can be used to evaluate, configure, and implement the ERP platform effectively. Once business needs have been confirmed, we define the required functional modules, data structures, integration points, security model, reporting needs, workflow requirements, hosting or cloud considerations, and compliance-related constraints. We also identify any technical dependencies, third-party applications, legacy interfaces, and performance considerations that may affect the solution design. Our technical specifications are typically documented in a way that supports both solution evaluation and project delivery. This may include requirement matrices, process-to-system mappings, interface requirements, data migration requirements, role and permission structures, reporting specifications, and non-functional requirements such as security, scalability, recoverability, and supportability. Our objective is to ensure that the ERP solution is assessed and configured against clearly defined business and technical expectations rather than general assumptions.
Describe your methodology for conducting a fit gap analysis between member needs and software capabilities.	Our fit-gap methodology is designed to provide a structured and objective comparison between the member's business requirements and the capabilities of the proposed ERP solution. After completing the business needs assessment and defining key requirements, we organize requirements by business area, process, priority, and complexity. We then review each requirement against the software's standard capabilities, configuration options, extension possibilities, integration options, and any relevant third-party solutions. Each requirement is typically classified as a fit, partial fit, gap, or out-of-scope item. Where gaps are identified, we assess the available options, such as process redesign, standard configuration, supported extension, custom development, third-party integration, or phased delivery. We also evaluate the impact of each gap in terms of business importance, cost, timeline, risk, and maintainability. The result is a practical decision-support tool that helps the client understand what the software can support out of the box, where changes may be required, and what trade-offs should be considered before moving forward.
Detail your approach to calculating the total cost of ownership for software solutions.	Our approach to total cost of ownership is to provide a realistic, lifecycle-based view of the costs associated with adopting, implementing, operating, and supporting an ERP solution over time. We do not limit the analysis to initial software licensing or implementation fees. Instead, we consider all major cost categories, including software subscriptions or licenses, implementation services, data migration, integrations, training, change management, testing, infrastructure or cloud services where applicable, ongoing support, maintenance, upgrades, and internal client effort. Where appropriate, we also consider indirect and long-term cost drivers such as customization complexity, dependency on third-party applications, vendor support model, reporting requirements, scalability, and future enhancement needs. Our goal is to help clients understand not only the initial project investment, but also the longer-term cost implications of ownership so they can make informed decisions based on value, sustainability, and operational fit. Where useful, we can present total cost of ownership using phased estimates, scenario comparisons, or expected versus high-complexity ranges to support budgeting and procurement planning.
How do you confirm your firm's neutrality regarding partnerships or financial incentives you may receive from software OEMs?	EQTech Solutions confirms its neutrality by grounding recommendations in documented business requirements, fit-gap findings, implementation considerations, and the client's best interests rather than in vendor incentives or partnership status. While we may maintain software partnerships or reseller relationships that support delivery, these relationships do not override our responsibility to provide objective guidance. Our evaluation approach is based on structured needs assessment, transparent criteria, documented assumptions, and clear explanation of trade-offs so that clients can understand why a particular solution is being recommended. Where relevant, we disclose applicable partnership relationships and any role we may have in licensing, implementation, or support. We also separate business needs analysis from solution recommendation through documented evaluation criteria and objective assessment methods. Internally, we are committed to avoiding conflicts of interest that could impair independent judgment or create the appearance of improper influence.
	n/a
	n/a

Member access to program offering

Question	Response
List the steps required for Canoe Members who want to engage with your firm to discuss their ERP implementation needs. Begin from initial contact to providing a price proposal and quotation.	1) Initial Contact: The Member contacts EQTech Solutions by phone or email and provides a high-level overview of its ERP implementation needs, current environment, and objectives. 2) Introductory Discussion and Scoping:EQTech Solutions schedules a discovery call or meeting to understand the project scope, key business requirements, timeline, user count, major integrations, data migration expectations, and other important project considerations. 3) Review of Information and High-Level Planning: Based on the information provided, EQTech Solutions reviews the Member's requirements, validates assumptions, and develops a high-level project approach, including scope, estimated phases, major milestones, and delivery considerations. 4) Price Proposal and Quotation: EQTech Solutions provides a project plan and corresponding price proposal or quotation, including assumptions, scope boundaries, and next steps.
List all the information you require at minimum from Canoe members in order to provide a project plan and subsequent price proposal to Members.	At minimum, EQTech Solutions would typically require the following information in order to prepare a meaningful project plan and price proposal: -organization name and primary contact information -high-level project objectives and business drivers -current ERP or legacy systems in use -high-level scope of business functions to be included, such as finance, procurement, payroll, HR, project accounting, or reporting number of users, user groups, and legal entities or operating divisions in scope -high-level description of major integrations or third-party systems involved -high-level data migration scope, including whether master data, open transactions, and historical data are expected to be migrated -target timeline or desired go-live window -preferred delivery model, if known, such as remote, hybrid, or on-site -any key security, compliance, hosting, or data residency requirements known at the time -indication of internal client resources available to support the project -any material constraints, risks, or non-negotiable requirements already identified Without this baseline information, any project plan or quotation would be highly preliminary and subject to assumptions.
List the information which would be helpful but not mandatory for your firm to provide a project plan and price proposal to Members.	The following information would be helpful, but not mandatory, to improve the quality and accuracy of the project plan and price proposal: -current-state process maps or workflow documentation -sample reports, dashboards, forms, and approval workflows -organizational charts and stakeholder lists -current pain points by department or business unit -chart of accounts structure and reporting hierarchy -estimated data volumes and data quality considerations -integration architecture diagrams or interface inventories -previous implementation lessons learned or known project risks -desired future-state process improvements or transformation goals -preferred phasing approach, such as finance first, then procurement, then payroll -expected procurement or approval timelines -desired support model after go-live -internal change management and training capacity -details of any third-party solutions under consideration -scoring criteria or decision framework if ERP software selection is still underway

Scalability and staffing

Question	Answer *
Explain how you will manage multiple, simultaneous implementation projects for different members who may have similar competing timelines. With legacy software sunsetting by 2029, there will be increased demand and a bottle neck effect for demand for ERP Implementation services.	EQTech Solutions manages multiple concurrent projects through structured portfolio planning, disciplined resource allocation, and a scalable delivery model. We maintain centralized oversight across active engagements to monitor project timelines, resource utilization, critical dependencies, and upcoming milestone demands. This allows us to identify capacity constraints early, sequence work appropriately, and assign the right mix of senior and supporting resources across projects. We also use phased delivery planning so that not all projects compete for the same resources at the same moment in the lifecycle. To address periods of increased market demand, we rely on a combination of early intake assessment, standardized implementation methods, reusable delivery assets, cross-trained team members, and backup coverage for critical roles. We prioritize clear governance, realistic scheduling, and proactive communication with clients where timing pressures exist. This helps us maintain delivery quality even when multiple projects are progressing in parallel. Our goal is not simply to take on volume, but to do so in a controlled manner that protects timelines, service quality, and client confidence.
Detail how you ensure consistent pricing and service levels across all participating members.	EQTech Solutions ensures consistency in pricing and service levels through a standardized commercial and delivery framework. Pricing is developed using defined rate structures, role categories, scope assumptions, and effort estimation methods so that similar services are priced consistently across comparable engagements. Where project complexity, timeline, location, or scope differs, those differences are clearly documented and reflected transparently in the proposal. Service consistency is maintained through the use of common implementation methodology, standard governance practices, defined project roles, regular reporting cadence, and established quality controls. Each client receives a delivery structure that is tailored to its needs, but grounded in the same core standards for planning, communication, issue resolution, testing, documentation, and post-go-live support. This allows EQTech Solutions to remain flexible while still delivering a consistent level of professionalism, responsiveness, and accountability across all engagements.
Explain your staffing model and structure.	EQTech Solutions uses a scalable staffing model that aligns team composition to the size, complexity, and phase of each engagement. Our structure typically includes executive oversight, project management, solution architecture, functional consulting, technical consulting, data migration support, training and change enablement, and post-go-live support. Not every project requires the same team size or structure, so resources are assigned based on scope, business priorities, integration requirements, and implementation timeline. Our model combines senior leadership involvement with hands-on delivery by specialized consultants. This allows us to provide strategic oversight while also ensuring that day-to-day project execution is managed by resources with the appropriate functional and technical expertise. Where appropriate, team members may support multiple projects, but critical roles are assigned based on capacity planning and continuity considerations to protect delivery quality and client service levels.
List the main categories of personnel for implementation project team and the certification required for each one. (technical leads, project managers etc.)	1- Executive Sponsor / Engagement Lead: Senior ERP delivery experience and executive oversight experience. Formal certification may not always be mandatory for this role, but strong leadership and project governance experience is expected. 2- Project Manager: Experience with ERP implementations and stakeholder coordination is required. 3- Solution Architect / Functional Lead: Relevant Microsoft Dynamics 365 certification, solution architecture experience, and strong ERP process knowledge are expected. Functional expertise in finance, operations, supply chain, or project accounting may also be required depending on scope. 4-Functional Consultant: Microsoft Dynamics 365 functional certification, or equivalent product-specific certification where applicable, combined with direct implementation experience in the relevant module area. 5- Technical Lead / Technical Consultant:Microsoft technical certifications relevant to Dynamics 365, Azure, integrations, or development tools are typically required, depending on the nature of the work. Experience in integrations, extensions, data migration, and system design is expected. 6- Data Migration Lead / Data Specialist: Strong experience in data analysis, migration planning, reconciliation, and ERP conversions is required. Certifications in data tools or Microsoft platforms may be preferred depending on the project. 7- QA / Testing Lead: Experience in ERP testing strategy, user acceptance testing support, and defect management is required. Formal testing certifications may be preferred depending on project size and complexity. 8- Training and Change Management Lead: Experience in training delivery, user enablement, and organizational change support is required. Change management certification or training credentials may be preferred where organizational change is a significant project component. 9- Post-Go-Live Support Resources: Product knowledge, troubleshooting capability, and client support experience are required. Relevant Microsoft certifications may be assigned depending on the support area.
Explain if and how you use contracted resources or sub-contractors to supplement your workforce.	EQTech Solutions does not use contracted resources or sub-contractors to supplement its workforce without the client's prior knowledge and approval. Before project kickoff, we assess the scope, timeline, complexity, and required skill sets to confirm whether the internal resources assigned to the engagement are sufficient. If additional capacity or specialized expertise is needed, we will communicate this to the client in advance and obtain the client's approval before introducing any contracted resource or sub-contractor. EQTech Solutions remains flexible and has access to additional talent when needed, which allows us to scale the team appropriately while maintaining transparency, project control, and service quality.

Technical Support

Question	Answer *
Describe the customer support services available for technical issues, including support channels, hours of availability, response and resolution targets, escalation paths, and any service-level commitments for Canoe Members.	EQTech Solutions provides technical support for post-go-live ERP issues through the following channels: email, phone, Microsoft Teams, and a shared support intake or ticketing process agreed with the Member at the start of the support engagement. Our standard support hours are Monday to Friday, 8:00 AM to 8:00 PM Eastern Time, including statutory holidays. This provides one consistent national support window across Canadian provinces. For Critical issues, after-hours escalation support can be coordinated through the agreed escalation path. Support requests are prioritized as follows: (Critical) - Complete system outage or major impact. This is always treated as highest priority. Response time: 1 hour Estimated effort: 4 hours (High) - Significant functional issues affecting key processes. Complex technical issues, including customizations, integrations, or system bugs requiring specialist intervention. Response time: 4 hours Estimated effort: 8+ hours (Medium) - Minor functional issues with limited user impact. In-depth functional troubleshooting, including business process issues and module configuration. Response time: 1 business day Estimated effort: 3 to 8 hours (Low) - Non-urgent issues. Basic help desk inquiries such as navigation support or password resets. Response time: 2 business days Estimated effort: 0.5 to 3 hours The escalation path typically follows this structure: 1)Initial intake and triage by EQTech Solutions support resources 2)Escalation to the assigned functional consultant or technical consultant 3) Escalation to the solution architect or technical lead for higher-impact or unresolved issues 4) Escalation to the engagement lead and, where applicable, the ERP OEM for platform-level defects or vendor-managed incidents As part of our service-level commitment, EQTech Solutions commits to acknowledging and triaging issues within the applicable response window, communicating priority and next steps clearly, and keeping the Member informed until the issue is resolved or an agreed action plan is in place.
Describe your technical support model, including the distinction between ERP OEM-provided support and partner-provided support. Identify which types of issues are handled directly by your company.	EQTech Solutions acts as the primary support contact for the Member and handles most day-to-day ERP support directly. This includes issues related to system configuration, security roles and permissions, workflows, reports, business process questions, user errors, data issues, integrations, customizations, and extension-level troubleshooting. We also support training-related questions, post-go-live stabilization, and general application guidance. ERP OEM-provided (in this case, Microsoft) support applies primarily to issues that fall outside the partner's direct control, such as core platform defects, vendor-managed cloud service incidents, product bugs in standard functionality, and release-related issues that require OEM intervention. In those cases, EQTech Solutions remains the main point of contact for the Member, manages the case with the OEM, and coordinates follow-up through to resolution.
Describe how support responsibilities are divided between your company and ERP OEM, including issue triage, root-cause analysis, and platform-level defects.	EQTech Solutions is responsible for first-line intake, issue triage, initial investigation, and root-cause analysis. When a support issue is reported, we first determine whether the issue is caused by configuration, business process design, user setup, security, reporting, integrations, data, or custom development. If the issue falls within those areas, EQTech Solutions investigates and resolves it directly. If our investigation shows that the issue is caused by a platform-level defect, a Microsoft-managed service issue, or a defect in standard OEM-controlled functionality, EQTech Solutions escalates the case to the ERP OEM. In those situations, we remain responsible for coordinating communication with the Member, providing issue evidence, tracking progress, and helping validate the final resolution once the OEM provides a fix or response.
Describe how technical support interacts with OEM update and release process, including communication of upcoming releases, support for regression issues, and schedule stability.	and communicates upcoming changes to Members when those changes may affect configuration, integrations, customizations, workflows, reporting, or user processes. Where needed, we help Members assess release impact, identify testing requirements, and plan readiness activities before the update is applied. If a regression issue appears after an update or release, EQTech Solutions performs the initial assessment to determine whether the issue is related to configuration, customizations, integrations, or OEM-controlled platform changes. We then either resolve the issue directly or escalate it to the OEM as required. Our role is to help the Member maintain stability during the release cycle by providing impact analysis, regression support, coordination with the OEM, and practical guidance on next steps. To support schedule stability, EQTech Solutions encourages a structured release review process that includes advance communication, review of affected areas, validation of critical business processes, and controlled follow-up after the release is deployed.

Risk identification and mitigation plan

The purpose is to show subject-matter expertise through clear identification and management of material risks ahead of time. Listing risks with high likelihood or high impact before mitigation will not reflect negatively on the Proponent. In fact, demonstrating a thorough understanding of ERP implementation risks and their management will show depth of expertise and practical experience. Proponents should use judgment and focus only on material risks that require specialized knowledge of ERP implementations.

Generic risk frameworks or methodologies, including general project risk management, transfer of risk to client via change order will not demonstrate specialized knowledge and will score poorly. Identified risks must relate directly to ERP implementation and be detailed enough to show validity and relevance. The Proponent must explain how mitigation measures avoided or minimized negative impacts on project outcomes.

Proponents should emphasize risk and issue avoidance or mitigation tactics that helped manage budget, schedule, and scope effectively without defacto transferring the risk to client.

Risk Description *	Proposed mitigation *	How this reduces deviation on project and impact on Member. *
Legacy data quality issues leading to migration errors, reconciliation problems, and reporting inaccuracies	Conduct an early data assessment to identify source systems, ownership, data quality gaps, duplicate records, missing values, and historical data constraints. Define clear migration scope by data category. Perform multiple mock migrations, reconciliation cycles, and business validation sessions before final cutover. Assign business data owners to approve cleansed and converted data.	Reduces the likelihood of failed cutover, inaccurate opening balances, and post-go-live reporting issues. Improves confidence in the new system and avoids schedule delays caused by late data surprises or extensive manual correction after go-live.
Underestimated integration complexity between ERP and surrounding systems	Identify integrations during discovery, including payroll, banking, procurement tools, CRM, reporting platforms, and third-party operational systems. Document interface ownership, data direction, frequency, dependencies, and exception handling. Prioritize critical integrations early and validate them through end-to-end testing using realistic scenarios.	Prevents late-stage design changes, missed dependencies, and manual workarounds after go-live. Protects timeline and business continuity by ensuring key upstream and downstream systems function correctly with Business Central (ERP solution).
Excessive customization driven by legacy process replication rather than future-state design	Use structured fit-gap workshops to challenge whether legacy processes should be retained, simplified, or standardized. Classify requests as configuration, extension, true business-critical gap, or deferrable enhancement. Review each gap for operational value, upgrade impact, maintainability, and cost before approval.	Limits unnecessary build effort, reduces testing and support burden, and helps control scope and budget. Improves long-term maintainability and reduces risk of upgrade issues or delayed deployment caused by over-customization.
Incomplete or inaccurate requirements for finance, approvals, compliance, and reporting	Conduct role-based workshops with finance, operational users, approvers, and reporting stakeholders. Validate requirements through process maps, prototype reviews, and playback sessions rather than relying only on written requirements. Confirm statutory, audit, approval, and reporting needs before design is finalized.	Reduces the risk of discovering critical gaps late in the project or after go-live. Helps ensure that the solution supports required controls, approvals, and reporting outputs without major redesign or rework.
Security role design that is either too broad or too restrictive	Define security and segregation-of-duties requirements early. Build role-based access models tied to actual job functions. Validate with business owners and test access using representative user profiles before go-live. Include review of approval rights, data visibility, and exception scenarios.	Prevents operational disruption, control weaknesses, and user frustration caused by poor access design. Reduces post-go-live support volume and limits the risk of audit or compliance concerns arising from improper permissions.
User acceptance testing that does not reflect real business scenarios	Build UAT scripts around actual end-to-end processes, including exceptions, approvals, month-end activities, procurement cycles, and reporting outputs. Require participation from business users who perform the work day to day, not only project team members. Track defects to closure and require formal sign-off by process owners.	Improves readiness and catches process, configuration, and data issues before production. Reduces the likelihood of major business disruption after go-live and limits costly stabilization efforts caused by insufficient testing coverage.

Situational questions

Many Canadian public entities face a common challenge. They must modernize aging, highly customized ERP systems while maintaining operational stability, protecting sensitive data, working within limited budgets and managing significant organizational change. For example, many municipal systems are approaching end of life, including Dynamics GP. They also face staffing shortages, limited consulting capacity, complex integrations, and pressures to adopt cloud, SaaS, and emerging technologies without disrupting essential services.

Using this scenario, describe how your team would lead a public sector entity through this modernization challenge. Avoid using marketing material in your response.

<table>
<tr><th>Question</th><th>Answer *</th></tr>
<tr><td>Describe how the project team would plan and manage the transition from an on-premise or hybrid architecture to a modern cloud or SaaS platform.</td><td>EQTech Solutions would lead the transition to Microsoft Dynamics 365 Business Central SaaS through a structured sequence rather than a single large cutover.

First, we would confirm the future-state architecture and decide what stays, what is retired, and what must integrate with Business Central. In a typical public sector case, this usually means moving core finance, purchasing, approvals, and reporting into Business Central while reviewing whether payroll, tax tools, bank integrations, document management, or other satellite systems remain external.

Second, we would stand up the target environments early, typically a sandbox environment for design and testing and a production environment for deployment. We would define identity and access architecture, approval workflows, interface methods, and data migration paths before build begins.

Third, we would create a phased transition roadmap. For a legacy platform such as Dynamics GP or Dynamics NAV, this usually includes:

1) legacy system inventory and freeze rules for new customizations
2) Business Central environment setup
3) redesign of core finance structure
4) integration build and validation
5) mock data migration cycles
6) end-to-end testing
7) cutover rehearsal
8) go-live and hypercare

Fourth, we would sequence cutover activities around operational stability. For example, we would avoid major cutover during year-end close, audit periods, or budget season. We would also preserve read-only access to the old system after go-live so finance and audit teams can reference historical transactions without forcing all history into the new platform on day one.

The goal is to move the organization from a fragile on-premise or hybrid environment into Microsoft Dynamics 365 Business Central SaaS with controlled risk, not with a large disruptive replacement event.</td></tr>
<tr><td>Describe how the project team would support data cleaning, migration, and integration with other systems.</td><td>EQTech Solutions would treat data migration as a dedicated workstream with named ownership, not as a late-stage technical task.

For Microsoft Dynamics 365 Business Central, we would begin by classifying data into five groups:

1. master data
2. open transactional data
3. historical balances
4. reporting history
5. data to archive only

In a legacy Dynamics GP migration, this usually means reviewing:

-chart of accounts
-vendors
-customers
-fixed assets
-open payables and receivables
-bank balances
-budgets
-dimensions or reporting attributes
-historical GL detail

We would then assign data owners from the client side for each major area and run data profiling to identify duplicate vendors, inactive records, invalid addresses, missing tax information, broken dimension values, and accounts that should be consolidated or retired.

For migration into Business Central, we would build a clear crosswalk from old structures to new ones. A common example is redesigning the chart of accounts and mapping legacy departments, programs, funds, or cost centres into Business Central dimensions so reporting improves rather than simply replicating old inefficiencies.

Our migration cycle would then follow this order:

1) extract legacy data
2) cleanse and normalize
3) map to Business Central structures
4) load to sandbox
5) reconcile
6) business review and sign-off
7) repeat in mock conversions
8) final production cutover

For integrations, we would document each interface by:

-source system
-target system
-data owner
-frequency
-trigger
-failure handling
-reconciliation method

In a public sector environment, typical integrations may include payroll, procurement tools, banking files, CRM, POS, grant systems, reporting platforms, or document management tools. We would prioritize the interfaces that affect cash, approvals, vendor payments, and financial reporting first, because those are the integrations most likely to disrupt operations if not stabilized before go-live.</td></tr>
<tr><td>Describe how the project team would address cybersecurity, privacy, and regulatory requirements during the transition.</td><td>EQTech Solutions would build security and compliance directly into the Microsoft Dynamics 365 Business Central design.

At a practical level, that means we would define:

-role-based access by job function
-segregation of duties for high-risk finance activities
-approval limits and approval routing
-access review process
-audit trail requirements
-secure data migration handling
-production support controls

For example, in a finance implementation, we would not allow the same user to freely create vendors, approve payments, and release payment journals without a control review. We would design those responsibilities separately and validate them during testing.

During migration, we would protect sensitive information by limiting who can access raw legacy extracts, controlling where files are stored, and using controlled transfer methods. If production data needs to be used in a non-production environment, we would review whether masking or reduced extraction is needed for personal or sensitive information.

We would also review:

-privacy requirements for personal information
-retention requirements for financial records
-access logging expectations
-internal change control requirements
-incident escalation expectations

Testing would include security validation, approval workflow validation, and role testing using actual user scenarios. Go-live readiness would not be approved until access, approvals, and support controls are confirmed.</td></tr>
</table>

Describe how the project team would approach organizational change management to support user adoption.	EQTech Solutions would not wait until training week to manage change. For a move from a legacy system such as Dynamics GP to Microsoft Dynamics 365 Business Central, change management starts at project kickoff. We would first identify impacted groups, typically: -finance leadership -AP staff -AR or billing staff -purchasing staff -approvers -budget owners -IT support -report consumers -executive stakeholders We would then define what is changing for each group. For example: -new approval methods -new screen layouts -new dimensions -different reporting logic -new period-end steps -removal of manual spreadsheet workarounds From there, we would put in place: -named super-users by function -regular playback sessions -role-based communications -targeted job aids -hands-on scenario training -post-go-live office hours We would also use Business Central playbacks to show users actual future-state transactions before go-live, such as invoice entry, approval routing, bank reconciliation, fixed asset acquisition, or budget review. This reduces fear because users can see the system performing real business tasks rather than only hearing abstract design decisions. We would measure adoption through concrete indicators, including: -percentage of users trained by role -participation rate in UAT -number of defects raised by business users versus project team only -support tickets by module in the first 30 days -percentage of transactions processed correctly without workaround -time required to complete first month-end close -user feedback from super-users and business leads In practical terms, adoption is successful when the client can run its normal finance cycle in Business Central without depending on the implementation team for every step.
Describe how the project team would assess the current legacy environment, including customizations, integrations, data quality, and risks.	EQTech Solutions would perform a structured legacy assessment before finalizing scope. For a system such as Dynamics GP, we would assess four areas in detail: 1) First, customizations. We would inventory all modifications, reports, workflows, interfaces, and manual workarounds. Each item would be classified as: -retire -replace with standard Business Central functionality -replace through process redesign -rebuild as an extension -keep through integration outside Business Central This step is critical because many legacy environments are carrying customizations that no longer provide real value. 2) Second, integrations. We would identify every system that sends data to or receives data from the legacy ERP. We would document the interface purpose, owner, frequency, failure handling, and business criticality. This often reveals hidden dependencies such as Excel uploads, SQL scripts, scheduled jobs, or staff-driven manual rekeying that were never formally documented. 3) Third, data quality. We would profile finance and master data to identify duplicate vendors, inactive customers, broken account structures, old projects, incomplete tax information, inconsistent dimension logic, and unsupported historical structures. This tells us what can move cleanly into Business Central and what must be fixed first. 4) Fourth, operational and project risk. We would assess where the organization is exposed because of unsupported software, undocumented processes, dependency on one or two key employees, weak controls, or high-volume manual workarounds. These are often the real reasons a legacy ERP has become risky, not just its age. The output of this phase would be a factual modernization baseline, not a generic review. That baseline is what lets us design a realistic Business Central implementation plan.
Describe how the project team would manage competing demands on internal staff and limited resourcing.	EQTech Solutions would manage limited client capacity by designing the project around decision efficiency. We would do three things immediately. First, we would define exactly which client roles are required and when. Instead of inviting large groups to every session, we would assign one accountable business owner per workstream and only bring in specialist users when a decision or validation is needed. Second, we would time-box workshops and prepare heavily in advance. That means pre-read documents, draft process flows, draft assumptions, and targeted question lists are sent before workshops so internal staff are reacting to concrete material rather than building everything live in meetings. Third, we would protect operational periods. For example, we would avoid scheduling heavy finance workshops during month-end close, audit support periods, annual budget cycles, or major procurement cycles. Internally, EQTech Solutions would absorb more of the project administration load by preparing: -meeting materials -process documentation -action tracking -test scripts -status reporting -draft decisions for review That way, internal staff provide business judgment and approvals, but they are not forced to carry the documentation and coordination burden while also keeping essential public services running.

Describe how the project team would control costs, timelines, and risks while maintaining essential operations.	EQTech Solutions would control cost, schedule, and implementation risk for a Microsoft Dynamics 365 Business Central project by locking scope early, validating assumptions before build begins, and managing delivery through clear stage gates and weekly progress control. Our objective is to prevent budget overruns and timeline slippage by eliminating late surprises, limiting unnecessary customization, and maintaining strong project discipline from discovery through go-live. At the start of the project, EQTech Solutions would establish a detailed implementation plan with clearly defined scope, assumptions, deliverables, milestones, decision deadlines, and client responsibilities. Each major phase would have entry and exit criteria so that the project does not move into configuration, migration, testing, or cutover without the required approvals and readiness. This prevents downstream work from starting before upstream decisions are complete. To control costs, EQTech Solutions would: -confirm business requirements and fit-gap decisions before major configuration or development begins -separate essential go-live scope from lower-priority enhancements -use repeatable design templates, migration methods, and testing structure to reduce rework -track actual effort against planned effort on a weekly basis and address any variance immediately -provide weekly reports showing project health, effort spent, top risks, progress made, and next steps -escalate any scope, dependency, or timing issue early, before it becomes a budget problem To control timelines, EQTech Solutions would: -define milestone dates at the beginning of the project and actively manage against them -use weekly scrum meetings and regular stakeholder stand-ups to remove blockers quickly -enforce decision deadlines for design, data, integrations, testing, and cutover -run mock migrations and testing cycles early enough to correct issues without pushing the go-live date -closely manage critical path activities such as finance design, integration readiness, data conversion, UAT, and cutover preparation -avoid compressing testing, training, or validation near the end of the project just to preserve the appearance of schedule progress To control risks while maintaining essential operations, EQTech Solutions would: -preserve access to the legacy environment during the transition period -schedule workshops, design validation, and testing around operational peak periods such as month-end, audit support, and budget cycles -avoid go-live during high-risk operational periods -rehearse cutover before production deployment -provide structured hypercare support immediately after go-live, including direct support through the first critical finance cycles such as the first month-end close EQTech Solutions does not rely on last-minute change orders or timeline extensions as the default way to manage delivery pressure. Our approach is to manage the agreed implementation scope in a disciplined way so that the committed phase can be delivered within the agreed budget and timeline baseline. If new scope is introduced by the client, that change is handled transparently and separately, but the core project is still governed against the original approved plan. EQTech Solutions controls cost and schedule by ensuring that Microsoft Dynamics 365 Business Central is implemented in a disciplined, transparent, and validated manner. Requirements are confirmed early, customizations are tightly controlled, risks are surfaced quickly, progress is measured every week, and the client always has visibility into project status. This is how we protect both the project commitment and the Member's day-to-day operations. Since its inception, EQTech Solutions has maintained a strong delivery track record and has not had an implementation project exceed the agreed budget or the agreed timeline.
Situation: A Member is transitioning to a new ERP system. This includes the Finance module. Using plain language, propose the ideal sequence for implementing the various Finance module components. Your response should include: -which component of the Finance module should go first, second and third etc; -why are you recommending this order? Do not state that the sequence: "depends on the client".	For Microsoft Dynamics 365 Business Central, the ideal order is: 1) First: Financial foundation setup Set up the chart of accounts, dimensions, fiscal calendar, posting groups, number series, approval structure, and user permissions. (Why first): These settings control how every finance transaction behaves. In public sector organizations, dimensions are especially important because they often carry department, program, fund, grant, or location reporting. If this structure is wrong, reporting and controls will be wrong everywhere else. 2) Second: General Ledger Confirm journal setup, posting rules, opening balances, recurring journals, and core ledger controls. (Why second): The General Ledger is the accounting backbone of Business Central. It must be stable before subledgers start sending transactions into it. 3) Third: Accounts Payable Set up vendors, invoice entry rules, approval workflows, payment methods, and payment journals. (Why third): Payables is usually one of the first high-volume operational processes that must work immediately after go-live. It also tests approvals, posting, taxes, and bank-related controls. 4) Fourth: Accounts Receivable Set up customers, invoicing, receipts, credit memo handling, and cash application. (Why fourth): Once payables is stable, receivables can be implemented on the same posting structure. This completes the two largest day-to-day transaction streams. 5) Fifth: Bank Account Management and Bank Reconciliation Set up bank accounts, payment exports if applicable, reconciliation rules, and cash monitoring. (Why fifth): Bank reconciliation should be configured after payables and receivables because it depends on those transactions flowing correctly through the system. 6) Sixth: Fixed Assets Set up asset classes, posting groups, depreciation books, acquisition rules, transfers, and disposals. (Why sixth): Fixed assets depends on stable finance structure but usually does not need to go before the main transaction engines unless the organization has a very asset-heavy operating model. 7) Seventh: Budgets Load budget structures, import budget values, and validate budget reporting by account and dimension. (Why seventh): Budgets should be built after the account and dimension structure is fully confirmed. Otherwise, the budget model may need to be rebuilt. 8) Eighth: Financial reporting and period-end close routines Set up account schedules, reporting packages, variance views, close checklists, and management reporting. (Why eighth): Reporting should be finalized after the ledger, subledgers, dimensions, budgets, and reconciliations are all working correctly. This gives the finance team reliable outputs instead of reports built on unstable setup. This order is recommended because it builds Microsoft Dynamics 365 Business Central from the inside out. First the accounting structure, then the transaction engines, then cash control, then assets and budgets, and finally reporting and close. That sequence reduces rework, improves testing, and gives the finance team the best chance of a stable first close in the new system.

Engagement , Marketing and Training

Line Item	Question	Response *

1	Describe the engagement and marketing strategy your company will implement if successful in this solicitation. Your answer should be specific to the various types stakeholders involved.	EQTech Solutions would implement a focused engagement and marketing strategy built around the different stakeholders involved in a public sector group purchasing program. For Canoe leadership and program management, our objective would be to establish a clear launch plan, communication rhythm, escalation process, and reporting structure. Shortly after award, we would align on contact points, co-branded positioning, key messages, target member profiles, webinar topics, intake process, and ongoing business review cadence. For Canoe Members, our strategy would focus on education, accessibility, and practical value. We would position EQTech Solutions as an implementation partner for Microsoft Dynamics 365 Business Central and Microsoft Dynamics 365 Sales, with strong experience in Dynamics GP and Dynamics NAV (Navision) modernization. Our member-facing outreach would include targeted discovery calls, educational webinars, short capability presentations, solution overview materials, and practical implementation guidance for organizations evaluating ERP replacement or already planning an implementation. For public sector decision-makers, including finance leaders, IT leaders, procurement teams, and executive sponsors, our approach would focus on business outcomes rather than generic marketing language. Messaging would center on modernization planning, cloud transition, implementation readiness, data migration, governance, cost control, adoption, and support. For EQTech Solutions' internal sales and delivery teams, the strategy would focus on readiness and consistency. Internal teams would be trained on how the contract works, how to identify eligible opportunities, how to position the value of cooperative purchasing, and how to respond consistently to member inquiries. For the broader Microsoft and partner ecosystem, EQTech Solutions would promote awareness of the contract through its existing business network, market presence, and relationship channels where appropriate, with the objective of increasing visibility among organizations that may be considering Microsoft Dynamics 365 Business Central implementation services. Overall, the strategy would combine direct member engagement, internal enablement, educational outreach, and regular collaboration with Canoe so that the contract remains visible, easy to access, and well supported.
2	Collaboration between Canoe and the vendor is essential to the buy-in of group purchasing by vendors and their distribution network. What do you expect Canoe's role to be in demonstrating the value of the contract?	EQTech Solutions views Canoe's role as an important driver of trust, visibility, and contract adoption. We believe Canoe can play a valuable role in helping Members understand the benefits of the contract, the cooperative purchasing model, and the practical advantages of accessing pre-established implementation services through this vehicle. From EQTech Solutions' perspective, Canoe's involvement would ideally help reinforce the value of the contract by supporting awareness through its communication channels, helping present the contract as a practical procurement option for Members, and facilitating opportunities for member engagement where appropriate. This could include helping communicate the benefits of procurement efficiency, reduced sourcing friction, access to qualified vendors, and the flexibility for Members to engage vendors based on their own needs and internal processes. In practical terms, EQTech Solutions would welcome Canoe's collaboration in areas such as launch communications, supplier directory visibility, information sessions, and periodic business reviews to assess utilization and promotion effectiveness. We would also be pleased to collaborate with Canoe on co-hosted webinars or educational sessions to showcase our expertise, our implementation approach, and our way of working to Members who may be evaluating ERP modernization initiatives. EQTech Solutions sees this as a collaborative relationship in which Canoe helps strengthen awareness and credibility of the contract, while EQTech Solutions supports adoption through responsive engagement, subject-matter expertise, and practical guidance for interested Members.
3	Describe how you will train your sales force and distribution network on the value of utilizing the group purchasing such as the Canoe contract for public sector and non for profit clients. Include details on measure you will put in place, such as type and cadence of engagement etc.	EQTech Solutions would train its sales force and client-facing team through a structured internal enablement approach focused on contract awareness, public sector buying context, and consistent positioning of the Canoe contract. Because EQTech Solutions operates with a focused internal sales and delivery model rather than a broad external dealer network, this training would primarily apply to our internal business development, leadership, and client engagement resources, as well as any approved partner or referral resource involved in market-facing activity. The training program would begin with an initial onboarding session following contract award. This session would cover how the Canoe contract works, which types of Members may be eligible, how to identify when a public sector or non-profit organization could benefit from the contract, and how to explain the value of cooperative purchasing in practical terms. It would also cover how to position EQTech Solutions' services in Microsoft Dynamics 365 Business Central and Microsoft Dynamics 365 Sales, including the distinction between ERP selection support and ERP implementation services. To support consistency, EQTech Solutions would put in place a set of internal measures and tools, including a contract overview guide, qualification questions for Canoe-related opportunities, standard messaging for sales discussions, a defined intake and escalation process, and CRM tagging for Canoe-related leads and accounts. This helps ensure that opportunities are identified early, handled consistently, and aligned with the contract requirements. From a cadence perspective, EQTech Solutions would implement: -an initial formal enablement session after contract award -a written internal playbook and FAQ for ongoing reference -monthly internal reviews of Canoe-related opportunities and pipeline activity -quarterly refresh sessions for sales, leadership, and client-facing resources -update briefings when there are changes to contract requirements, reporting expectations, or promotional priorities Where relevant, EQTech Solutions would also extend this enablement to any approved external partner or referral relationship involved in identifying or supporting Canoe-related opportunities, to ensure that the contract is represented accurately and consistently. The overall objective of this training approach is to ensure that EQTech Solutions' sales force understands when to position the Canoe contract, how to communicate its value clearly to public sector and non-profit clients, and how to move opportunities from initial interest to discovery, scoping, and proposal in a disciplined and consistent manner.
4	Describe your methodology and approach to a successful start up / implementation plan and ongoing review and monitoring of the contract use and promotion. Include details on measure you will put in place.	EQTech Solutions would approach startup and ongoing contract management through a structured four-stage plan: launch, internal enablement, market activation, and ongoing review. Launch and setup would begin immediately after contract award. During this stage, EQTech Solutions would align on primary contacts, escalation points, communication expectations, reporting format, contract positioning, and member intake process. We would prepare the internal contract summary, intake workflow, sales messaging, CRM tracking tags, and member response process so the team is ready before external promotion begins. Internal enablement would ensure that business development, leadership, and client-facing resources understand how the Canoe contract works, when to position it, and how to guide a Member from initial interest through discovery, scoping, and quotation. This stage would include a formal onboarding session, an internal playbook, qualification questions, and standard messaging for Canoe-related opportunities. Market activation would focus on practical awareness and engagement. EQTech Solutions would support contract visibility through targeted outreach, introductory conversations, educational sessions, webinars, capability presentations, and direct follow-up with eligible organizations where appropriate. We would also welcome opportunities to participate in co-hosted sessions with Canoe to explain our expertise, our implementation approach, and the value of accessing services through the contract. Ongoing review and monitoring would be managed through a regular internal review process and periodic alignment with Canoe. EQTech Solutions would track contract-related inquiries, discovery calls, proposals, awarded work, and member engagement activity. We would review what is working, where awareness can be improved, and which member segments are showing the greatest interest. Measures that would be put in place include: -internal onboarding session after contract award -written internal playbook and FAQ -defined intake and escalation process -monthly internal review of contract activity and pipeline -periodic review of member inquiries, quotes issued, and conversion activity -annual or periodic business review discussions focused on utilization, promotion effectiveness, and improvement opportunities This approach is designed to make the contract easy to activate, easy to position internally, and easy to monitor over time.

5	How will you be monitoring the adoption and utilization of the Canoe contract by your sales and distribution network? Which key performance indicators will you be monitoring?	EQTech Solutions would monitor adoption and utilization of the Canoe contract through its internal CRM, opportunity review process, sales follow-up discipline, and contract activity tracking. Because EQTech Solutions operates through a focused internal sales and client engagement model rather than a broad external dealer channel, monitoring would be centered primarily on internal adoption by business development, leadership, and client-facing team members, as well as any approved referral or partner relationships involved in Canoe-related opportunities. We would monitor whether the contract is being identified early enough in the sales cycle, whether eligible opportunities are being tagged correctly, whether the Canoe option is being discussed with relevant organizations, and whether opportunities are moving efficiently from inquiry to discovery to quotation. Key performance indicators would include: -number of Canoe-related inquiries received -number of qualified opportunities opened under the contract -number of discovery calls completed -number of project plans, quotations, or proposals issued -number and value of awarded engagements -conversion rate from inquiry to proposal -conversion rate from proposal to awarded work -average response time to member inquiries -average turnaround time to provide a project plan or quotation -number of educational sessions, webinars, or member-facing presentations delivered -number of internal team members trained on the contract -level of sales team participation in Canoe-related pipeline reviews -recurring themes in member demand, such as ERP selection support, Dynamics GP modernization, or Microsoft Dynamics 365 Business Central implementation These measures would allow EQTech Solutions to monitor both internal contract adoption and external contract utilization in a practical and measurable way.
6	Describe your commitment to attending and/or sponsoring Canoe member engagement events (e.g., reverse trade shows, conventions, golf tournaments, educational offerings, retreats etc.)	EQTech Solutions is committed to participating in Canoe member engagement activities where there is a meaningful opportunity to support awareness, education, and relationship development with Members. As a specialized ERP implementation firm, we see the greatest value in events and activities where we can contribute practical subject-matter expertise related to ERP modernization, cloud transition, implementation planning, data migration, and Microsoft Dynamics 365 Business Central. Our commitment would include attending relevant member-facing events where practical, participating in educational offerings such as webinars, panels, workshops, or presentations, and supporting opportunities to engage directly with public sector and non-profit stakeholders that may be evaluating ERP modernization initiatives. We would also be open to selective sponsorship opportunities where the event audience, geography, and format are well aligned with the contract and where there is a clear opportunity to provide value to Members. EQTech Solutions would take a targeted approach rather than a volume-based approach. Our focus would be on participating in the events where we can bring meaningful expertise, have productive conversations with eligible organizations, and strengthen awareness of the Canoe contract in a relevant and professional manner.
7	Provide details on industry and association partnerships your company has fostered over time which will be beneficial to promoting the Canoe contract in Canada.	EQTech Solutions' ability to help promote the Canoe contract in Canada is supported by a combination of Microsoft ecosystem relationships, business community involvement, and market-facing networks developed through our work in ERP consulting and digital transformation. These include: -our position within the Microsoft ecosystem, including our focus on Microsoft Dynamics 365 Business Central, Microsoft Dynamics 365 Sales, and Microsoft-related cloud services -our standing as a Certified Digital Advisor under the Canadian Digital Adoption Program (CDAP) -our business development and professional network across Quebec and Canada, including relationships developed through chambers of commerce, regional business communities, and economic development-oriented organizations -our visibility in sectors such as manufacturing, distribution, finance, and digital transformation, which often overlap with organizations evaluating ERP modernization -our client and market experience across North America, which supports credibility when discussing implementation readiness, legacy system replacement, and cloud transition EQTech Solutions has also built relationships through its participation in business and association environments such as the Chamber of Commerce of Metropolitan Montreal (CCMM), the broader South Shore business ecosystem, and other relationship-driven networks that support outreach to organizations across Canada. While EQTech Solutions is not built on a mass dealer or reseller model, it does maintain a strong relationship-based market presence that can support targeted, credible promotion of the Canoe contract to relevant public sector and non-profit organizations.

Sales network

Question	Response *
Describe your company's capability to meet the CANOE Member needs across Canada or for each geographical area the Proponent wishes to do business in. Your response should address at least the following areas. a. Sales force. Please include details, such as the locations of your network of sales.	EQTech Solutions has the capability to support CANOE Member needs across Canada through a focused national sales and client engagement model. Our sales approach is built around a specialized team rather than a large dealer network, which allows us to engage Members in a consultative and consistent manner while bringing both commercial and implementation knowledge into early discussions. Our sales and client engagement presence is centered in the following locations: Brossard, Québec, Canada Calgary, Alberta, Canada From these locations, EQTech Solutions supports Members across Canada through a combination of remote engagement and in-person meetings where appropriate. This model enables us to serve Members in Eastern, Central, and Western Canada while maintaining responsiveness, consistency in messaging, and strong coordination between sales, solutioning, and delivery teams. Our sales force structure typically includes executive leadership involvement for strategic opportunities, business development and client engagement resources for qualification and relationship management, and solution architecture support for scoping, fit assessment, and implementation planning. This allows EQTech Solutions to respond effectively to Members seeking ERP selection support, ERP implementation services, or a combination of both. EQTech Solutions also has the advantage of being able to support Members in both English and French, which strengthens our ability to engage public sector and non-profit organizations across different regions of Canada. Our focused sales model ensures that Members receive informed guidance, timely follow-up, and access to resources who understand both the procurement context and the realities of ERP modernization initiatives, particularly those involving Microsoft Dynamics 365 Business Central.
Describe your how you manage government sales. Include details on the sales force and training structure and how you specifically address sales and marketing with public sector clients in a group procurement context.	EQTech Solutions manages government sales through a centralized, disciplined, and consultative approach tailored to public sector and non-profit procurement environments. Our government sales activities are led by a focused internal team rather than a broad dealer network, which allows us to maintain consistency in messaging, stronger control over opportunity qualification, and closer alignment between sales, solutioning, and delivery. Public sector opportunities are handled through a structured process that includes qualification of the procurement route, review of stakeholder groups, validation of implementation scope, assessment of timeline and delivery constraints, and confirmation of proposal requirements before commercial discussions advance. Our sales force structure combines executive leadership involvement, business development and client engagement resources, solution architecture support, and proposal coordination capabilities. This allows EQTech Solutions to bring both commercial and implementation knowledge into early discussions with public sector clients. Our sales presence is centered in Brossard, Québec and Calgary, Alberta, which supports national coverage across Canada through remote engagement and in-person meetings where appropriate. We are also able to support Members in both English and French. To support government sales readiness, EQTech Solutions trains its internal sales and client-facing team on public sector buying context, cooperative purchasing models, procurement sensitivity, and the practical requirements of ERP modernization initiatives. This training includes how to position Microsoft Dynamics 365 Business Central and Microsoft Dynamics 365 Sales appropriately for public sector clients, how to distinguish between ERP selection support and ERP implementation services, how to identify when a prospect may be eligible to use a group procurement contract, and how to guide that prospect from initial contact through discovery, scoping, quotation, and project planning. Internal enablement is supported by contract summaries, standard qualification questions, defined intake processes, CRM tagging, and periodic internal review of public sector opportunities. In a group procurement context, EQTech Solutions addresses sales and marketing through education, clarity, and relevance rather than broad promotional messaging. Our focus is on helping public sector and non-profit clients understand the practical value of using a cooperative contract, including procurement efficiency, reduced sourcing friction, access to qualified implementation support, and a more direct path from initial inquiry to project planning and pricing. We approach these conversations with content and messaging centered on real implementation concerns such as modernization of legacy systems including Dynamics GP, migration to Microsoft Dynamics 365 Business Central, cloud transition, data migration, governance, user adoption, support, and cost control. This allows EQTech Solutions to engage government clients in a manner that is professional, informed, and appropriate to the public sector buying environment.

Environmental and social governance ESG

Question	Response *
Describe your corporate ESG initiatives.	EQTech Solutions is committed to responsible business practices and continues to strengthen its environmental, social, and governance initiatives as it grows. Environmentally, we promote digital-first delivery, remote collaboration, paper-light operations, and efficient use of technology to reduce unnecessary travel and waste. Socially, we value employee development, mentorship, knowledge sharing, bilingual service delivery, and respectful long-term client relationships. From a governance standpoint, we emphasize accountability, ethical conduct, confidentiality, transparency, and disciplined project delivery through structured documentation, reporting, and oversight. Our ESG approach is practical, proportionate to our size, and focused on continuous improvement.

PART D -TERMS AND CONDITIONS OF THE SOLICITATION PROCESS

Proponents should structure their proposals in accordance with the instructions in the Procurement Portal.

A proponent who submits conditions, options, variations, or contingent statements, either as part of its proposal or after receiving notice of selection, may be disqualified.

1.1.1 Ability to Provide Deliverables

The Proponent has carefully examined the Solicitation documents and has a clear and comprehensive knowledge of the Deliverables required. The proponent represents and warrants its ability to provide the Deliverables in accordance with the requirements of the Solicitation for the rates set out in its proposal.

1.1.1.2 Non-Binding Pricing

The Proponent has submitted its pricing in accordance with the instructions in the Solicitation. The proponent confirms that the pricing information provided is accurate. The proponent acknowledges that any inaccurate, misleading, or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its proposal or its eligibility for future work.

1.1.2 Proposals in English

All proposals are to be in English only.

1.1.3 No Incorporation by Reference

The entire content of the proponent's proposal should be submitted in a fixed format, and the content of websites or other external documents referred to in the proponent's proposal, but not attached, will not be considered to form part of its proposal.

1.1.4 Past Performance

In the evaluation process, Canoe may consider the proponent's past performance or conduct on previous contracts with Canoe or other institutions.

1.1.5 Information in SOLICITATION Only an Estimate

Canoe and its advisers make no representation, warranty, or guarantee as to the accuracy of the information contained in this Solicitation or issued by way of addenda. Any quantities shown or data contained in this Solicitation or provided by way of addenda are estimates only and are for the sole purpose of indicating to proponents the general scale and scope of the Deliverables. It is the proponent's responsibility to obtain all the information necessary to prepare a proposal in response to this Solicitation.

1.1.6 Proponents to Bear Their Own Costs

The proponent will bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews or demonstrations.

1.1.7 Proposal to be Retained by Canoe

Canoe will not return the proposal or any accompanying documentation submitted by a proponent.

1.1.8 No Guarantee of Volume of Work or Exclusivity of Contract

Canoe makes no guarantee of the value or volume of work to be assigned to the selected proponent. The agreement to be negotiated with the selected proponent will not be an exclusive contract for the provision of the described Deliverables. Canoe may contract with others for goods and services the same as or similar to the Deliverables or may obtain such goods and services internally.

1.1.9 Trade Agreements

Proponents should note that (based on the Members looking to purchase under this Solicitation) this procurement process is subject to the requirements of:

- Comprehensive Economic and Trade Agreement between Canada and the European Union, Chapter 19 (Government Procurement)
- Canadian Free Trade Agreement, Chapter 5 (Government Procurement)
- New West Partnership Trade Agreement, Article 14 (Procurement) and Part V, Section C (Exceptions: Government Procurement)
- Trade and Cooperation Agreement Between Ontario and Quebec, Chapter 9
- Atlantic Procurement Agreement
- Ontario Broader Public Sector (BPS) Procurement Directive

1.2 Communication after Issuance of Solicitation

1.2.1 Proponents to Review Solicitation

Proponents should promptly examine all of the documents comprising this Solicitation and may direct questions or seek additional information in writing through the Procurement Portal on or before the Deadline for Questions. No such communications are to be sent or initiated through any other means. Canoe is under no obligation to provide additional information, and Canoe is not responsible for any information provided by or obtained from any source other than the Solicitation Contact or the Procurement Portal. It is the responsibility of the proponent to seek clarification on any matter it considers to be unclear. Canoe is not responsible for any misunderstanding on the part of the proponent concerning this SOLICITATION or its process.

1.2.2 All New Information to Proponents by Way of Addenda

This Solicitation may be amended only by addendum in accordance with this section. If Canoe, for any reason, determines that it is necessary to provide additional information relating to this Solicitation, such information will be communicated to all proponents by addendum posted in the Procurement Portal. Each addendum forms an integral part of this Solicitation and may contain important information, including significant changes to this Solicitation. Proponents are responsible for obtaining all addenda issued by Canoe.

1.2.3 Post-Deadline Addenda and Extension of Submission Deadline

If Canoe determines that it is necessary to issue an addendum after the Deadline for Issuing Addenda, Canoe may extend the Submission Deadline for a reasonable period of time.

1.2.4 Verify, Clarify, and Supplement

When evaluating proposals, Canoe may request further information from the proponent or third parties in order to verify, clarify, or supplement the information provided in the proponent's proposal. Canoe may revisit, re-evaluate, and rescore the proponent's response or ranking on the basis of any such information.

1.2.5 Restricted Communications

Proponents that fail to comply with the requirement to direct all communications to the Solicitation Contact may be disqualified from the Solicitation process. Without limiting the generality of this provision, Proponents may not communicate with or attempt to communicate with the following (unless instructed to by the Solicitation Contact):

1. any RMA director, officer, employee or agent (other than the Solicitation Contact);
2. any member of the Evaluation Team;
3. any expert or advisor assisting the Evaluation Team; or
4. any other elected official of any level of government, including any advisor to any elected official.

1.2.6 Authorized Communications, Amendments, Waivers

Proponents are advised that from the date of issue of the Solicitation through any award notification:

1. only the Solicitation Contact is authorized by CANOE to amend or waive the requirements of the Solicitation pursuant to the provisions of this Solicitation; and
2. under no circumstances shall a Proponent rely upon any information or instruction from any commissioner, officer, employee, agent of CANOE or RMA unless the information or instruction is provided in writing by the Solicitation Contact.

1.3 Notification and Debriefing

1.3.1 Notification to Other Proponents

Once an agreement is executed by Canoe and a proponent, the other proponents may be notified directly in writing and will be notified by public posting of the outcome of the procurement process.

1.3.2 Debriefing

Proponents may request a debriefing after receipt of a notification of the outcome of the procurement process. All requests must be in writing to the Solicitation Contact and must be made within sixty (60) days of such notification. The Solicitation Contact will contact the proponent's representative to schedule the debriefing. Debriefings may occur in person at Canoe's location or by way of conference call or other remote meeting format as prescribed by Canoe.

1.3.3 Procurement Protest Procedure

Any proponent with concerns about the Solicitation process is required to attend a debriefing prior to proceeding with a protest.

If, after attending a debriefing, the proponent wishes to challenge the Solicitation process, it should provide written notice to the Solicitation Contact in accordance with the procurement protest procedures below:

A bid dispute must be submitted within 5 Business Days of the circumstances giving rise to the dispute. To submit a bid dispute, proponents must deliver a written submission containing:

1. The name, address, and telephone number of the Proponent;
2. An indication that the bid dispute is authorized by an authorized signing officer or representative of the Proponent;
3. The Solicitation number;
4. Identification of the statute or procedure that is alleged to have been violated;
5. A precise statement of the relevant facts;
6. Identification of the issues to be resolved;
7. The Proponent's argument and supporting documentation; and
8. The Proponent's proposed resolution. All documentation must be addressed to:

Attention: General Manager, Canoe Procurement Group of Canada
Canoe Procurement Group of Canada
2510 Sparrow Drive, Nisku, Alberta T9E 8N5

EMAIL: proposals@canoeprocurement.ca

Once a bid dispute has been received, the General Manager, Canoe Procurement Group of Canada will initiate a review of the matter. The General Manager will complete that review and provide a response to the proponent as soon as reasonably possible, but generally within 10 Business Days.

That response shall be the final response from CANOE regarding the bid dispute.

Filing a bid dispute does not affect a Proponent's ability to participate in ongoing or future procurement opportunities with CANOE.

1.4 Conflict of Interest and Prohibited Conduct

1.4.1 Conflict of Interest

For the purposes of this Solicitation, the term "Conflict of Interest" includes, but is not limited to, any situation or circumstance where:

1. in relation to the Solicitation process, the proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including, but not limited to:
2. having or having access to confidential information of Canoe in the preparation of its proposal that is not available to other proponents;
3. having been involved in the development of the Solicitation, including having provided advice or assistance in the development of the Solicitation;
4. receiving advice or assistance in the preparation of its response from any individual or entity that was involved in the development of the Solicitation;
5. communicating with any person with a view to influencing preferred treatment in the Solicitation process (including, but not limited to, the lobbying of decision-makers involved in the Solicitation process); or
6. engaging in conduct that compromises, or could be seen to compromise, the integrity of the open and competitive Solicitation process or render that process non-competitive or unfair; or
7. in relation to the performance of its contractual obligations under a contract for the Deliverables, the proponent's other commitments, relationships, or financial interests:
8. could, or could be seen to, exercise an improper influence over the objective, unbiased, and impartial exercise of its independent judgement; or
9. could, or could be seen to, compromise, impair, or be incompatible with the effective performance of its contractual obligations.

1.4.2 Disqualification for Conflict of Interest

Canoe may disqualify a proponent for any conduct, situation, or circumstances, determined by Canoe, in its sole and absolute discretion, to constitute a Conflict of Interest as defined above.

An existing supplier of Canoe may be precluded from participating in the Solicitation process in instances where Canoe has determined that the supplier has a competitive advantage that cannot be adequately addressed to mitigate against unfair advantage. This may include, without limitation, situations in which an existing supplier is in a position to create unnecessary barriers to competition through the manner in which it performs its existing contracts, or situations where the incumbent fails to provide the information within its control or otherwise engages in conduct obstructive to a fair competitive process.

1.4.3 Disqualification for Prohibited Conduct

Canoe may disqualify a proponent, rescind an invitation to negotiate, or terminate a contract subsequently entered into if Canoe determines that the proponent has engaged in any conduct prohibited by this Solicitation.

1.4.4 Prohibited Proponent Communications

Proponents must not engage in any communications that could constitute a Conflict of Interest and should take note of the Conflict of Interest declaration set out in the Procurement Portal.

1.4.5 Proponent Not to Communicate with Media

Proponents must not, at any time directly or indirectly, communicate with the media in relation to this Solicitation or any agreement entered into pursuant to this Solicitation without first obtaining the written permission of the Solicitation Contact.

1.4.6 No Publicity or Promotion

CANOE does not wish any Proponent, including the Ranking Proponent, to make any public announcement or distribute any literature regarding this Solicitation or otherwise promote itself in connection with this Solicitation or any arrangement entered into under this Solicitation without the prior written approval of CANOE.

If a Proponent, including the Ranking Proponent, makes a public statement either in the media or otherwise that is contrary to CANOE's wishes noted above, then:

1. CANOE may disqualify that Proponent; and
2. although CANOE intends to treat all Proposals as confidential, CANOE may disclose any information about a Proponent's Proposal to provide accurate information and/or to rectify any false impression which may have been created.

1.4.7 No Lobbying

Proponents must not, in relation to this Solicitation or the evaluation and selection process, engage directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of the selected proponent(s).

1.4.8 Illegal or Unethical Conduct

Proponents must not engage in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion, or collusion. Proponents must not engage in any unethical conduct, including lobbying, as described above, or other inappropriate communications; offering gifts to any employees, officers, agents, elected or appointed officials, or other representatives of Canoe; deceitfulness; submitting proposals containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process provided for in this SOLICITATION.

1.4.9 Supplier Suspension

Canoe may suspend a supplier from participating in its procurement processes for prescribed time periods based on past performance or based on inappropriate conduct, including, but not limited to, the following:

1. illegal or unethical conduct as described above;
2. the refusal of the supplier to honor its submitted pricing or other commitments;
3. engaging in litigious conduct, bringing frivolous or vexatious claims in connection with Canoe's procurement processes or contracts, or engaging in conduct obstructive to a fair competitive process; or

4. any conduct, situation, or circumstance determined by Canoe, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest.

In advance of a decision to suspend a supplier, Canoe will notify the supplier of the grounds for the suspension and the supplier will have an opportunity to respond within a timeframe stated in the notice. Any response received from the supplier within that timeframe will be considered by Canoe in making its final decision.

1.5 Confidential Information

1.5.1 Confidential Information of Canoe

All information provided by or obtained from Canoe in any form in connection with this Solicitation either before or after the issuance of this Solicitation:

1. is the sole property of Canoe and must be treated as confidential;
2. is not to be used for any purpose other than replying to this SOLICITATION and the performance of any subsequent contract for the Deliverables;
3. must not be disclosed without prior written authorization from Canoe; and
4. must be returned by the proponent to Canoe immediately upon the request of Canoe.

1.5.2 Confidential Information of Proponent

A proponent should identify any information in its proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by Canoe. The confidentiality of such information will be maintained by Canoe, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed, on a confidential basis, to advisers retained by Canoe to advise or assist with the Solicitation process, including the evaluation of proposals. If a proponent has any questions about the collection and use of personal information pursuant to this Solicitation, questions are to be submitted to the SOLICITATION Contact.

1.6 Procurement Process Non-Binding

1.6.1 No Contract A and No Claims

This procurement process is not intended to create and will not create a formal, legally binding bidding process and will instead be governed by the law applicable to direct commercial negotiations. For greater certainty, and without limitation:

1. this Solicitation will not give rise to any Contract-A-based tendering law duties or any other legal obligations arising out of any process contract or collateral contract; and
2. neither the proponent nor Canoe will have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the award of a contract, failure to award a contract, or failure to honour a proposal submitted in response to this Solicitation.

1.6.2 No Contract until Execution of Written Agreement

This Solicitation process is intended to identify prospective suppliers for the purposes of negotiating potential agreements. No legal relationship or obligation regarding the procurement of any good or service will be created between the proponent and Canoe by this Solicitation process until the successful negotiation and execution of a written agreement for the acquisition of such goods and/or services.

1.6.3 Non-Binding Price Estimates

While the pricing information provided in proposals will be non-binding prior to the execution of a written agreement, such information will be assessed during the evaluation of the proposals and the ranking of the proponents. Any inaccurate, misleading, or incomplete information, including withdrawn or altered pricing, could adversely impact any such evaluation or ranking or the decision of Canoe to enter into an agreement for the Deliverables.

1.6.4 Cancellation

Canoe may cancel or amend the Solicitation process without liability at any time.

1.6.5 Competition Act

Under Canadian law, a Proponent's Proposal must be prepared without conspiracy, collusion, or fraud. For more information on this topic, visit the Competition Bureau website at http://www.cb-bc.gc.ca/eic/site/cb-bc.nsf/eng/01240.html, and in particular, part VI of the *Competition Act,* R.S.C. 1985, c. C-34.

1.7 Rights of Canoe Procurement Group of Canada – General

In addition to any other express rights or any other rights which may be implied in the circumstances, CANOE reserves the right to (in its sole discretion):

1. make public the names of any or all Proponents;
2. request written clarification or the submission of supplementary written information from any Proponent and to incorporate such clarification or supplementary written information into the Proponent's Proposal;
3. waive formalities and accept Proposals that substantially comply with the requirements of this Solicitation;
4. contact or not contact any or all references provided by the Proponent;
5. verify with any Proponent or with a third party any information, or check references other than those provided by Proponents, as set out in a Proposal:
6. disqualify any Proponent whose Proposal contains misrepresentations or any other inaccurate or misleading information, or any Proponent whose reasonable failure to cooperate with CANOE impedes the evaluation process, or whose Proposal is determined to be non-compliant with the requirements of the Solicitation;
7. disqualify any Proponent that has a Conflict of Interest or Unfair Advantage, or where reasonable evidence of any Unfair Advantage or Conflict of Interest is brought to the attention of CANOE, and CANOE determines that no reasonable mitigation is possible, or that the Proponent has not taken sufficient steps to promptly address such matters to the satisfaction of CANOE;
8. disqualify any Proponent that is bankrupt or insolvent, or where bankruptcy or insolvency are a reasonable prospect;
9. disqualify any Proponent that has engaged in significant or persistent deficiencies in performance of any substantive requirement or obligation under a prior contract or contracts;
10. disqualify any Proponent if the Proponent, or any officers, directors or other key personnel of the Proponent:
    a. are subject to final judgments in respect of serious crimes or other serious offences; or
    b. have engaged in professional misconduct or acts or omissions that adversely reflect on the commercial integrity of the Proponent – including where there is any evidence that the Proponent or any of its employees or agents colluded with any other Proponent, its employees or agents in the preparation of its Proposal, or have made false declarations to CANOE;
11. disqualify any Proponent if the Proponent has failed to pay taxes;
12. make changes, including substantial changes, to this Solicitation provided that those changes are issued by way of addenda in the manner set out in this Solicitation;
13. accept or reject a Proposal if only one Proposal is submitted;
14. accept any Proposal in whole or in part;
15. reject a subcontractor proposed by a Proponent within a consortium;
16. reject a Proposal:
    a. if CANOE or RMA has initiated a dispute, claim or litigation with that Proponent;
    b. if that Proponent has initiated or is involved in a dispute, claim or litigation against CANOE or RMA that CANOE or RMA considers to be frivolous, vexatious, without merit and/or unreasonable;
    c. if the Proponent has failed to satisfy an outstanding debt to CANOE or RMA;
    d. if the Proponent has a history of illegitimate, frivolous, unreasonable or invalid claims;
    e. if the Proponent provides incomplete, unrepresentative or unsatisfactory references; or
    f. if CANOE determines that it would not be in the public interest to accept the Proposal;
    g. select a Proponent other than the Proponent whose Proposal reflects the lowest cost to CANOE; or
    h. cancel this Solicitation process at any stage (without providing reasons), and thereafter issue a new request for proposals, request for qualifications, engage in limited tendering, or take no further action in respect of the matters contemplated by this Solicitation.

By submitting a Proposal, the proponent authorizes the collection by CANOE of the information identified in this Solicitation which CANOE may request from any third party.

1.7.1 No Prohibited Conduct

The proponent declares that it has not engaged in any conduct prohibited by this Solicitation.

1.7.2 Disclosure of Information

The proponent hereby agrees that any information provided in this proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The proponent hereby consents to the disclosure, on a confidential basis, of this proposal by Canoe to the advisers retained by Canoe to advise or assist with the Solicitation process, including with respect to the evaluation of this proposal.

1.8 Governing Law and Interpretation

These Terms and Conditions of the Solicitation Process (PART D):

1. are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision);
2. are non-exhaustive and will not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and
3. are to be governed by and construed in accordance with the laws of the province of Alberta and the federal laws of Canada applicable therein.

End of PART D

☑

I have the authority to bind the Proponent.

- Eric Zhuang, Co-Founder I Client Advisory, EQTech Solutions

Conflict of Interest
The proponent must declare all potential Conflicts of Interest or unfair advantages as described in this Solicitation. This includes disclosing the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other capacity) who (a) participated in the preparation of the proposal; AND (b) were employees of Canoe within twelve (12) months prior to the Submission Deadline.

By Selecting "NO" in the box below, the Proponent declares that (a) there was no Conflict of Interest in preparing its proposal; and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the Solicitation.

○ **Yes** ◉ **No**

The Proponent is deemed to have read and taken into account all addenda issued by Canoe.

Please check the box in the column "**I have reviewed this addendum"** below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum 02 CAN-2025-002 Fri March 6 2026 02:04 PM	☑	[illegible]
Addendum 01-CAN-2026-002 Tue February 24 2026 04:24 PM	☑	[illegible]

Schedule "B1"

PRICING

Schedule “C”

MARKETING AND PROMOTION OF AGREEMENT

Once the Agreement is awarded, the Supplier will meet with Canoe to discuss an effective launch strategy, and shall provide:

- Supplier’s contact information;
- Customer engagement strategy;
- Access to knowledge sharing materials (e.g., webinars);
- Escalation process;
- Marketing materials, and,
- Other relevant materials.

To support Members, Canoe and the Supplier will work together to encourage the use of the Agreement resulting from this RFP.

The Supplier will actively promote the Agreement to Members by:

- Educating and creating awareness within their dealer and distribution networks about group purchasing, Canoe Procurement Group and the use of Canoe contract by Members;
- Conducting sales and marketing activities directly to onboard Members;
- Providing excellent and responsive Members support;
- Identifying Members savings; and
- Identifying improvement opportunities (e.g., planning priorities, multi-year projects).

Canoe will promote the use of the Agreement with Members by:

- Using online communication tools to inform and educate;
- Holding information sessions and webinars, as required;
- Attending, when appropriate, Members and Supplier events;
- Facilitating Member engagement, where appropriate;
- Providing effective business relationship management;
- Managing and monitoring Supplier performance;
- Facilitating issue resolution; and
- Marketing Supplier promotions.

Schedule "D"

SAMPLE SALES REPORT

CANOE SUPPLIER ADMIN FEE TEMPLATE
Monthly Submission of Data Required

Supplier Name: OFFICE SUPPLY COMPANY
Canoe Contract Number: CAN-2024-IIII
Month: June
Year: 2024

Member Number	Member Name	Province	Branch (if applicable)	Date of Purchase	Transaction Date	Accounting Date	PO #	Invoice #	Item Description	Category (Parts / Labour / Service)	Item cost	Miscellaneous	Freight	Subtotal	PST	GST/HST	Total Invoice	Amount eligible for Admin Fee	Admin Fee Rate	Admin Fee to Canoe
AB1603	SAMPLE ONLY County of your County	AB	ED	3/5/2024	3/5/2024	3/5/2024	555662	9955623	Pens	Parts	5.32	-	-	5.32	-	0.27	5.59	5.32	5.00%	0.27
AMM5002	SAMPLE ONLY RM of your town	MB	WN	2/1/2024	2/25/2024	3/1/2024	TR33556	9955624	Trays	Parts	552.30	0.20	0.50	553.00	33.18	27.65	613.83	552.30	5.00%	27.62
SAR1222	SAMPLE ONLY Town of At Home	SK	RG	12/23/2023	1/31/2024	3/1/2024	202403jjj	9955625	Whiteboard	Parts	1,555.20	-	20.30	1,575.50	110.29	78.78	1,764.56	1,555.20	5.00%	77.76
TOTALS											2,112.82	0.20	20.80	2,133.82	143.47	106.69	2,383.98	2,112.82	5.00%	105.64