Northwind Studio
Product design & engineering

PROJECT PROPOSAL

Customer Portal Rebuild

A unified self-service portal for 40,000 account holders — discovery, design, build and phased rollout over 18 weeks.

PREPARED FOR	ATTENTION	REFERENCE	ISSUED
Globex Corporation	**Priya Raman, VP Digital**	**PRO-2026-114**	**August 4, 2026**

VALID UNTIL

September 15, 2026

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1. Executive Summary

Globex's customer portal has grown by accretion over nine years. Three separate front ends now share one legacy session service, support volume tied to password and billing self-service has risen 34% year over year, and the mobile experience is effectively unusable below tablet width. Every additional feature costs more than the last.

We propose a single rebuild of the portal on a modern component architecture, delivered in four phases so value lands early: authentication and account overview in week 6, billing and payments in week 11, support and document access in week 15, with a phased migration completing in week 18. Nothing is switched off until its replacement is live and measured.

The engagement is fixed-price at $186,400 and staffed by a team of five who have shipped four comparable portals in regulated industries. Our commitment is a measurable reduction in self-service support contacts, a portal that meets WCAG 2.2 AA, and a codebase your own team can own from day one — with handover built into the plan rather than bolted on at the end.

18 weeks	4 phases	$186,400	5 people
END TO END	INCREMENTAL RELEASE	FIXED PRICE	DEDICATED TEAM

2. Background & Objectives

Globex serves 40,000 commercial account holders across North America. The current portal was built in 2017 on a server-rendered stack that has since been extended by three different vendors. There is no shared component library, two duplicate billing views, and a session service that no current employee has modified in over two years.

The operational cost is visible in the support queue. In the last four quarters, 61% of tier-one contacts concerned tasks the portal is nominally capable of: resetting credentials, retrieving an invoice, updating a payment method, or checking a shipment. Each of these is a task users abandon rather than complete.

The commercial cost is less visible but larger. Two revenue initiatives — self-service plan upgrades and usage-based billing alerts — have been deferred twice because neither can be built safely on the existing front end. Rebuilding the portal is the precondition for both.

2.1 What success looks like

- **Cut self-service support contacts by 30%** — measured against the tier-one ticket baseline for the 90 days before launch
- **Bring first meaningful paint under 1.5 seconds** — on a mid-range Android device over a 4G connection, at the 75th percentile

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- **Meet WCAG 2.2 AA across every shipped screen** — verified by automated checks in CI plus an independent audit before final release
- **Hand over a codebase Globex can extend** — documented component library, test coverage above 80%, and two weeks of paired development with your team

3. Scope of Work

The engagement covers discovery, design, implementation, migration and handover for the customer-facing portal. Work is organised into four workstreams that run in parallel from week three onward.

3.1 Discovery & Experience Design

Two weeks of research followed by continuous design running one sprint ahead of build. Every screen is validated with real account holders before it enters development.

- Stakeholder interviews across support, billing, and account management
- Analytics and support-ticket analysis to rank the twelve highest-friction journeys
- Moderated usability sessions with eight commercial account holders
- Information architecture, journey maps, and an annotated wireframe set
- High-fidelity design system: 40+ components, light and dark themes, full accessibility annotations

3.2 Front-end Implementation

A single component-driven application replacing all three existing front ends, built against a documented design system with visual regression tests from the first sprint.

- Component library with Storybook documentation and visual regression coverage
- Account overview, profile, and notification preferences
- Billing history, invoice download, and payment-method management
- Support centre with case history, document vault, and guided troubleshooting
- Responsive layouts from 320 px to ultrawide, keyboard and screen-reader verified

3.3 Integration & Platform

A thin, well-tested integration layer over your existing services. We do not rewrite backend systems; we give the portal a stable contract to consume.

- API gateway with request shaping, caching, and structured error handling
- Session and identity integration with your existing SSO provider
- Feature-flag infrastructure for progressive rollout and instant rollback
- Observability: structured logs, real-user monitoring, and error budgets per journey

3.4 Migration, QA & Handover

A cohort-based cutover with the legacy portal held in reserve, followed by structured knowledge transfer to the Globex team.

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- Automated test suite: unit, integration, and end-to-end on the twelve critical journeys
- Independent accessibility audit and remediation pass
- Cohort migration in four waves of increasing size, each held for 72 hours of monitoring
- Runbooks, architecture decision records, and two weeks of paired development

3.5 Not included

- Changes to the core billing engine or ledger — we integrate with it as it stands today
- Native iOS or Android applications (the portal is a responsive web application)
- Migration of historical support tickets older than 36 months
- Content translation and localisation beyond English (US)
- Ongoing hosting, infrastructure costs, and third-party licence fees

4. Delivery Timeline

Phases overlap by design: design runs one sprint ahead of build, and each phase ships to production behind a feature flag before the next begins. Dates assume a start on Monday, September 21, 2026.

PHASE	STAGE	KEY DELIVERABLES	DURATION	COMPLETES
01	**Discovery & Foundations** Design + Platform	Research findings, journey maps, design system foundations, integration layer scaffold, CI pipeline	4 weeks	Oct 16, 2026
02	**Identity & Account** Full team	Authentication, SSO integration, account overview, profile and notification preferences, first production release	3 weeks	Nov 6, 2026
03	**Billing & Payments** Full team	Invoice history and download, payment methods, plan details, usage alerts, second production release	5 weeks	Dec 11, 2026
04	**Support & Documents** Full team	Support centre, case history, document vault, guided troubleshooting, accessibility audit	4 weeks	Jan 15, 2027
05	**Migration & Handover** Platform + Globex	Cohort migration, legacy decommission plan, runbooks, paired development, final acceptance	2 weeks	Jan 29, 2027

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5. Investment

The engagement is quoted as a fixed price against the scope in section 3. Rates below are shown for transparency; you are not billed by the hour and no time-and-materials overage applies to work within scope.

ITEM	QTY	RATE	AMOUNT
Discovery & research Interviews, analytics review, usability testing, findings report	4 weeks	$6,400.00	$25,600.00
Experience & interface design Journey maps, design system, 46 annotated screens	9 weeks	$5,200.00	$46,800.00
Front-end implementation Component library plus four product areas	14 weeks	$4,900.00	$68,600.00
Integration & platform engineering API gateway, identity, feature flags, observability	8 weeks	$3,800.00	$30,400.00
QA, accessibility audit & migration Test suite, independent audit, cohort cutover	1	$18,500.00	$18,500.00
Handover & paired development Runbooks, architecture records, two weeks with your team	1	$7,200.00	$7,200.00
		Subtotal	$197,100.00
		Multi-phase commitment (−6%)	−$11,826.00
		Total investment	**$185,274.00**

5.1 Payment schedule

MILESTONE	TRIGGER	SHARE	AMOUNT
Mobilisation	On signature, before work begins	20%	$37,054.80
Phase 2 release	Identity and account live in production	25%	$46,318.50
Phase 3 release	Billing and payments live in production	25%	$46,318.50
Phase 4 release	Support and documents live in production	20%	$37,054.80
Final acceptance	Migration complete and handover signed off	10%	$18,527.40

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6. Assumptions & Terms

- Globex provides a named product owner available for a weekly one-hour review and able to resolve decisions within two business days.
- Access to staging environments, API documentation and a test data set is available within five business days of signature.
- Design and content approvals are returned within three business days; delays beyond this shift the schedule day for day.
- Third-party licences, hosting, and infrastructure costs are billed at cost and are not included in the fixed price.
- Intellectual property in all delivered work transfers to Globex on final payment; we retain the right to describe the engagement in our portfolio.
- Either party may terminate with 30 days' written notice; work completed to that date is invoiced at the phase rates shown above.

> **Validity.** This proposal is valid until September 15, 2026. Pricing is fixed for the scope described in section 3; changes are handled through a written change request signed by both parties.

7. Acceptance

By signing below, both parties accept the scope, timeline and investment set out in this proposal, and authorise work to begin on the agreed start date.

Priya Raman
VP Digital · Globex CorporationDate: _____

Dana Whitfield
Managing Partner · Northwind StudioDate: _____

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