

Personal Request For Proposal (pRFP) Engagement Model

Information Sharing Work Group

Engagement Model #: **2**

Status: **Review Draft.** This document is has been presented to the work group for consideration. Feedback and comments welcome for incorporation into future Work Group Report. ISWG contributors may send comments to wg-infosharing@kantarainitiative.org. Others may send comments directly to the author at joe@switchbook.com. Comments in this review period are welcome through September 13, 2010.

Author: Joe Andrieu

URL: During this review period, this document is available at <http://kantarainitiative.org/confluence/display/infosharing/Personal+RFP+Engagement+Model>

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Abstract

Sally uses a Personal Request for Proposal (pRFP) to solicit offers for, negotiate, and purchase a new car through the MyPal pRFP Broker. She has previously researched her options and made up her mind about the kind of car she wants to buy. She has also secured financing and credentials asserting that fact. Sally's information is maintained in a personal data store which provides it on demand for use by service providers and vendors. On the Vendor side, Frank at Chryota of London responds to Sally's Personal RFP (pRFP), using a hands-on approach that integrates CoL's CRM system, MyPal, and Chryota Manufacturing's CRM program HEARING AID, which is managed by Jimmy.

This engagement model is a detailed expansion of Step #3 of the Information Sharing Work Group's Car Buying Engagement Model, an instance of the Customer-Supplier Engagement Framework.

For consistent context, the events described in this model are presumed to take place in the United Kingdom.

Contents

PERSONAL REQUEST FOR PROPOSAL (PRFP) ENGAGEMENT MODEL..... 1

INTELLECTUAL PROPERTY NOTICE1

ABSTRACT.....1

DISTINCTIONS.....2

ACTORS.....2

SYSTEM DIAGRAM4

SCENARIO – SALLY’S EXPERIENCE.....5

SCENARIO – JIMMY’S & FRANK’S EXPERIENCE6

NARRATIVE – SALLY’S EXPERIENCE.....8

NARRATIVE - JIMMY’S & FRANK’S EXPERIENCE.....14

USE CASES.....22

STANDARD INFORMATION SHARING AGREEMENT REQUIREMENTS24

GLOSSARY.....25

OUTSTANDING ISSUES26

NOTES/COMMENTS/NOT YET INTEGRATED CONTENT26

CHANGE HISTORY.....26

Distinctions

1. Single Conceptual Personal Data Store, using data hosts and authorization managers
2. Personal Request for Proposal
 - a. Limited duration information sharing
 - b. Vendor integration
3. Legacy system integration

Actors

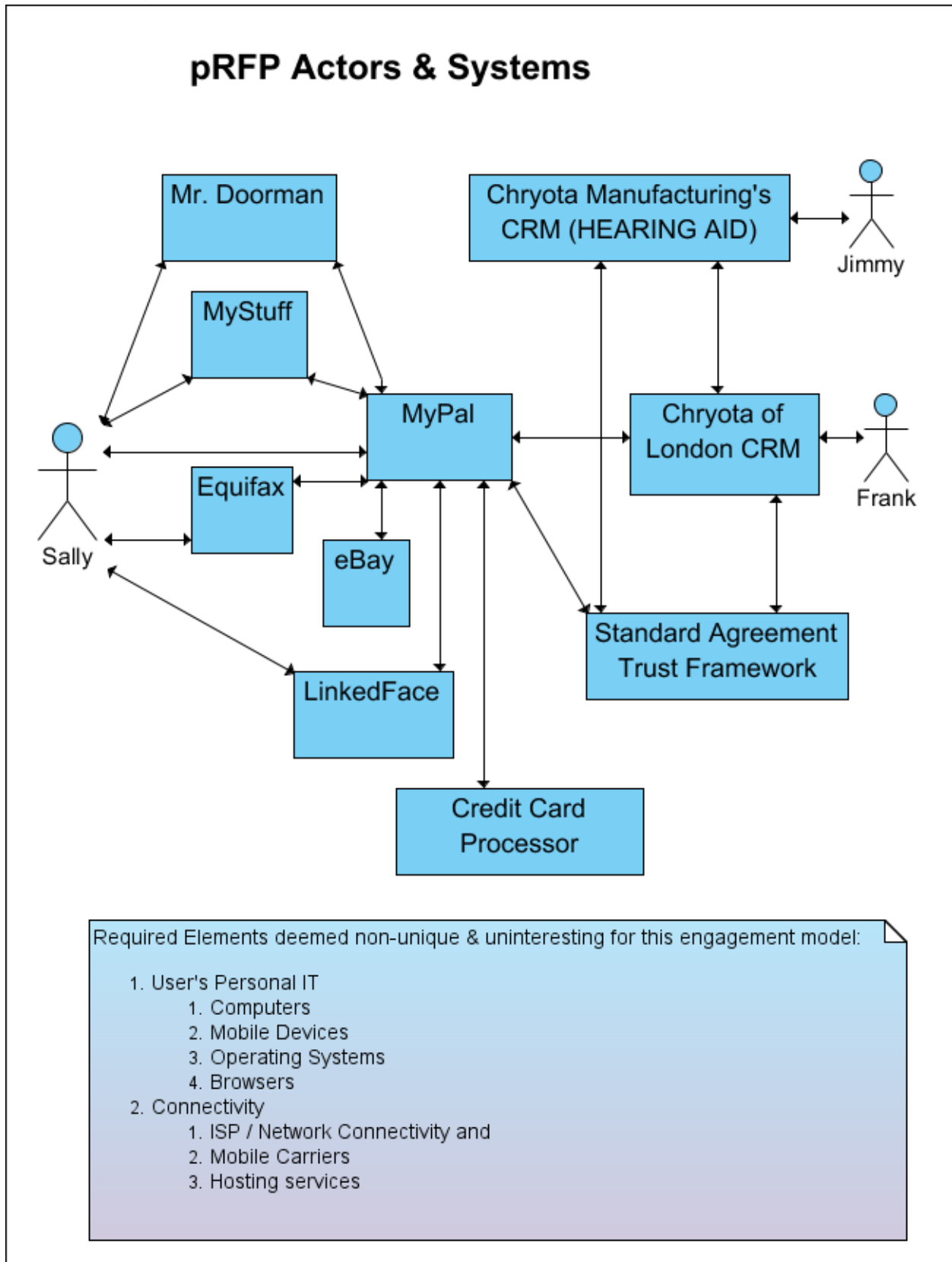
1. Sally – An individual
2. Jimmy – An employee of Chryota Manufacturing
3. Frank – An employee of Chryota of London
4. Hybrid Service Providers
 - a. MyPal, RFP Broker
5. Facilitators
 - a. MyStuff, Data Host
 - b. Mr. Doorman, Authorization Manager
 - c. Apple, mobile phone manufacturer
 - d. 02, mobile phone network provider
6. Vendors
 - a. Chryota, a car manufacturer
 - b. Authorized car dealers
 - c. Chryota of London, a Chryota authorized dealer
 - d. Sally's Credit Union (as a precursor)

- e. Bose, makers of audio systems
- f. Custom paint shop

Agencies (not engaged until the next stage in the Framework)

- g. Driver and Vehicle Licensing Agency
- h. Congestion Department

System Diagram



Scenario – Sally's Experience

Now that she knows what she wants, Sally fills out a PRFP template using MyPal's mobile phone app. She pulls in details from her prior research, specifying what she is interested in and how she wants the conversation to unfold.

Sally sets up MyPal as an Authorized Recipient with Mr. Doorman, provisioning MyPal as a pRFP Broker. She specifies the standard pRFP information use policy, which allows use only for responding to this pRFP, with long term storage only for quality control and future product and service development. It also allows authorized recipients not selected in the process to follow up once within the following year using Sally's protected inbox.

Second, Sally specifies what she is interested in and how she wants the conversation to unfold. To describe what she is looking for, Sally lists:

1. new 2010 Chryota Prius
2. enhanced Bose surround sound system (standard factory option)
3. standard Chryota kids package (car seat, etc.).
4. no convertible
5. custom color: Nemo (Clownfish) Orange w/ stripes (semi-structured)
6. purchase within 1 week
7. delivery in 2 weeks after purchase
8. drop off at her home
9. target price £22,000 (£10,000 cash deposit, balance on delivery)
10. buyer's financing (credit union loan for balance)
11. DVLA & Congestion permit paperwork (unstructured)
12. no Insurance (she already has it)

This list includes

- *Details about the product she wants*
- *Details about financing, price, and delivery*
- *Unstructured requests for customization or custom services*

To specify how she wants the conversation to unfold, Sally details who is to receive the pRFP, the terms of use for reviewing the pRFP, and how and when she wants them to communicate with her.

Sally starts building a white list of recipients by searching at MyPal through a list of Authorized Chryota Dealers within 25 miles of her home, and adds a few from a search of within 50 miles of her sister's. As she adds the vendors, MyPal presents notice of further distribution, letting Sally know with whom each Chryota dealer may share the pRFP information, allowing Sally to opt-out if possible. Each of the dealers lists Chryota Manufacturing, which Sally is ok with. MyPal's interface indicates one or more dealers have been excluded due to Sally's personal blacklist (as stored in her personal data store). Sally double checks that list and totally agrees: Bob's Chryota is never getting her business again! Based on Sally's searches, MyPal suggests two additional vendors, one an online car dealer and another a car broker near Sally's

home. Sally decides not to include those two in her recipient list. As she reviews possible recipients, MyPal displays the reputation information available for each Vendor. Sally drills down on the reputation details for two of the vendors, using MyPal's tracking data. At this point, she decides not to pay for the details provided by any of the third party reputation services.

When submitting this information, Sally authorizes MyPal, eBay, and Equifax as reputation providers for this transaction, linking this particular pRFP to Sally's reputation and tells Vendors that this transaction will be recorded for reputation tracking (of both Sally and the Vendor) at those three services. In exchange for this tracking information, the reputation providers agree to incorporate this transaction in future reputation scores and to provide a current reputation score to approved Vendors on a freemium business model: a simple score for free, details for a fee, while depersonalizing all information presented to help protect Sally's privacy. Sally also specifies that all questions asked during the pRFP process will be confidential, as will be their answers.

After a final review of the details, Sally tells MyPal to publish the pRFP, selecting the £25 option that will process offline paperwork, contact legacy vendors who haven't yet registered with MyPal, and host a protected inbox for communications with vendors. MyPal sends a notice to all of the Vendors on Sally's recipient list, giving them a way to review the pRFP once they agree to Sally's terms of use. For legacy vendors, MyPal makes a phone call, letting them know about the pRFP and recommending they sign up through their relationship with Chryota Manufacturing. Sally receives inquiries from two of the Vendors through MyPal, to which she replies. In her replies, she specifies that she wants the dealer to login to view her reply, rather than sending the message in clear text directly to the recipient. She ultimately receives offers meeting her criteria from three Vendors; those offers are hosted at MyPal.

After reviewing the offers, Sally calls Chryota of London and asks some additional questions. She takes notes on the conversation, which are stored along with the Vendor's offer at MyPal. Sally sends her husband a link to the offer (provisioning access via MyPal, and specifying her husband's contact service LinkedFace) and asks what he thinks. He likes it, but doesn't want the proposed audio system, suggesting a different model, just out from Bose. Sally sends a quick message to the Vendor, through MyPal, asking for the alternate sound system. The Vendor replies with an updated offer. Sally likes it and decides to pay £25 for Equifax's detailed reputation history for Chryota of London. She finds a history of recent transactions as well as reviews from actual customers in her area. Some of the reviews aren't so glowing, but they seem rare and from the comments, the customer may have been the unreasonable party.

After one last surf around the net to check out her alternatives, Sally makes her decision and commits to the sale, taking her to Step 4 of the Car Buying Engagement Model.

Scenario – Jimmy's & Frank's Experience

[From this perspective, Jimmy & Frank are combined as a "user" of the pRFP system. We will distinguish between these parties when possible, but the system boundary lies between the combined user and the services comprising the pRFP system]

Frank's CRM system at Chryota of London (CoL) is the first point of contact for Sally's pRFP from MyPal. Upon receiving the notice of the pRFP, the software automatically evaluates the terms of use, generates a non-repudiable proof of acceptance of those terms, and uses proof of acceptance at MyPal to download the pRFP. The pRFP is recorded in the CoL CRM system as a sales lead and forwarded to the central Chryota CRM system, which Jimmy sees, in accordance with the permission for further distribution authorized in the delivery envelope (as per Sally's instructions to MyPal).

Given Sally's financial credentials, reputation, and shopping timeframe, her pRFP escalates to the top of Frank's incoming priority list. He reviews what she is looking for, and his CRM system automatically pulls up inventory at his dealership that meets all of the automatically verifiable criteria. Frank reviews the options and considers Sally's special requests. The easy one is the DVLA and permitting for the congestion charge administrator. His dealership routinely handles these matters for buyers and he's been looking forward to trying out the new semi-automated system provided by Chryota. He marks that criteria as met, with a brief note and indicating no price impact. He also connects the pRFP to the Chryota's paperwork reduction system so that the DVLA and congestion permitting will be handled as quickly as possible should they win the deal.

For the second request, the custom color, Frank picks up his phone and calls his favorite custom paint shop, asking for a price quote. He gets about two of these every month and the shop loves to work with the dealership. Within 15 minutes he has a firm, fixed price quote faxed to him from the shop. The fax isn't printed out. It goes directly into the CRM system, routed to Frank. Frank attaches the digital fax to the pRFP as an internal supplement (not to be redistributed), marking the criteria met, and entering the appropriate price impact (based on the shop's price plus 10%). Finally, Frank reviews the delivery details and links the pRFP to their internal delivery scheduler, which confirms a £100 price impact, which is automatically entered into the pRFP tracking record.

Before preparing a final offer, Frank sends an inquiry to Sally asking if the initial £10,000 payment will be made in cash at the dealer, by personal or cashier's check through the post, by electronic check, or did she have another idea? The question is entered into the CoL CRM, which forwards it to Chryota's HEARING AID software and attaches the inquiry to the pRFP and automatically submits the message to MyPal. Sally's reply the next day clarifies that electronic check would be preferred. The reply is routed through MyPal to Chryota of London, automatically attached to the customer record, alerting Frank to the incoming message, and a copy is also sent to Chryota. Frank reads the message and updates the record with Sally's payment preference.

Frank walks over to his supervisor's office, bringing his tablet computer with the pRFP and offer ready for review. His boss pulls up the pRFP record on his machine, asks a few questions, and electronically approves the offer. Chryota of London's CRM system packages the offer and sends it to MyPal, which notifies Sally. CoL also sends a copy of the offer to Chryota's HEARING AID program.

Jimmy's dashboard presents a running view of the status of all pRFPs, resulting offers, and finalized deals, including key analytics and metrics about cost of acquisition, estimated manpower per sale, margins, and projected time-to-sale. Jimmy keeps on top of these numbers, because he knows their

equivalents in the traditional advertising & sales funnel for Chryota. So far, people are coming in at a lower cost of acquisition, and apparently further along in the purchasing process, which is resulting in a rather attractive time-to-sale.

Within an hour, Frank gets a call from Sally, routed directly to him based on the phone # she called, which also pulls up the pRFP record on his computer. Sally asks about the paint shop that would be doing the work. Frank explains who would be doing it, sharing a story about one of the more memorable projects from last spring. Sally mentions she's heard horrible things about Mike's paint shop and wanted to be sure her new car would be well taken care of. Frank is able to assure her and adds a note to the pRFP that the quality of the paint job is especially important to Sally. Sally thanks him and lets him know she's probably going to make a decision in the next two days and hangs up. The call is automatically noted in the Chryota of London CRM system, and propagated up to Chryota's HEARING AID program, becoming part of the sales funneling on Jimmy's analytic dashboard. Frank writes up a quick summary of the call and updates the estimates for closing the deal and timeframe. The HEARING AID system not only combines these estimates for analysis, it also learns how good Frank is at his estimates and adjusts accordingly, giving the overall numbers the highest possible accuracy.

Sally's request for a different sound system is routed directly to the CoL and from there to Chryota's HEARING AID program. Frank is notified via SMS that he has an incoming pRFP update. He reviews the request and is surprised, because he hadn't heard about the new sound system from Bose. He asks his supervisor if knows about it and it is new to him as well. Frank searches online to see what he can find out, and in fact, Bose just announced the new system today. He pulls up the contact information for the dealership's Bose representative and calls to ask about the new systems pricing and availability. The rep gives him the standard dealer rate and confirms he can get the system in to the dealership in two days from order. Frank requests a confirmed quote, the Bose rep faxes over the details, which, just like the paint shop quote, get attached to the pRFP and the price impact added. With the new price, Frank triggers an update on the CoL CRM, which automatically propagates to the HEARING AID program and the pRFP at MyPal, which notifies Sally.

After Sally accepts the latest offer, we move to Step 4, Transact, of the Car Buying Engagement Model.

Narrative – Sally's Experience

Precursor: Sally already introduced MyStuff to Mr. Doorman and stored her Credit Union credentials at MyStuff.

User Intent	System Responsibility
Now that she knows what she wants, Sally fills out a PRFP template using MyPal's mobile phone app. She selectively pulls in details from her prior research.	Sally sets up MyPal as an Authorized Recipient with Mr. Doorman, provisioning MyPal as a pRFP

Broker. She specifies the standard pRFP information use policy, which allows use only for responding to this pRFP, with long term storage only for quality control and future product and service development. It also allows authorized recipients not selected in the process to follow up once within the following year using Sally's protected inbox.

1. Start MyPal pRFP App on her mobile phone
 - a. Install mobile phone App
 - b. Run app
3. Tell MyPal about MyStuff
5. Login to Mr. Doorman and provision MyPal for access to specific information for the purposes of managing a pRFP process. Select information from the personal data store to be shared, including:
 - a. a specific Search history
 - b. a specific digital scrapbook with notes and information on the car she wants
 - c. vendor blacklist
 - d. financial credentials from Credit Union
 - e. Sally's address
 - f. preferred contact channel (protected inbox address)
 - g. the terms under which the information is to be shared (in this case, using standard pRFP terms)

2. Setup App
 - a. Introduce app to MyPal servers
 - b. Ask for personal data store
4. MyPal Attempts to get pRFP info from MyStuff
 - a. MyPal asks MyStuff for PRFP information
 - b. MyStuff tells MyPal to see Mr. Doorman
 - c. Mr. Doorman tells MyPal it needs proof of signature on standard information sharing agreement, specific authorization by Sally to provision MyPal for access, and proof of acceptance of Sally's terms of use.
 - d. MyPal asks Sally to provision access using the URL from Mr. Doorman.
6. Mr. Doorman records the new policy for MyPal and redirects Sally back to MyPal.
7. MyPal gets pRFP info from MyStuff
 - a. MyPal shows proof to Mr. Doorman
 - i. signed token from a valid InfoSharing Trust Framework provider
 - ii. signed token demonstrating acceptance of Sally's specific terms
 - e. Mr. Doorman gives MyPal key to MyStuff's data store
 - f. MyPal requests & gets pRFP information from MyStuff
8. MyPal Maps incoming pRFP information to pRFP template
9. MyPal presents pre-filled template to Sally for confirmation

Second, Sally specifies what she is interested in and how she wants the conversation to unfold. To describe what she is looking for, Sally lists:

1. new 2010 Chryota Prius
2. enhanced Bose surround sound system
3. standard Chryota kids package (car seat, etc.).
4. no convertible
5. custom color: Nemo (Clownfish) Orange w/ stripes (semi-structured)
6. purchase within 1 week
7. delivery in 2 weeks after purchase
8. drop off at her home
9. target price £22,000 (£10,000 cash deposit, balance on delivery)

<p>10. buyer's financing (credit union loan for balance) 11. DVLA & Congestion permit paperwork (unstructured) 12. no Insurance (she already has it)</p>	
<p>10. Edits & Confirms pRFP a. Removes irrelevant information b. Corrects incorrect information c. Adds new information d. Confirms edits</p>	<p>11. Record edits</p>
<p>Sally starts building a white list of recipients by searching at MyPal through a list of Authorized Chryota Dealers within 25 miles of her home, and adds a few from a search of within 50 miles of her sister's. As she adds the vendors, MyPal presents notice of further distribution, letting Sally know with whom each Chyota dealer may share the pRFP information, allowing Sally to opt-out if possible. Each of the dealers lists Chryota Manufacturing, which Sally is ok with.</p>	
<p>12. Ask for vendor selection tool. 14. Request authorized Chryota dealers within 25 miles of her home. 16. Selects specific vendors from search results. 18. Repeat query and selection for vendors within 50 miles of second address</p>	<p>13. Present Vendor selection tool a. suggest default query based on analysing information from personal data store. Suggestion: a. all car dealers b. near Sally's address (showing the address) c. proposed distance of 10 miles d. exclude vendors from Sally's blacklist e. ordered by reputation 15. Search information base and display results a. Show dealers meeting the criteria b. Indicated at least one blacklisted vendor is not being shown 17. Process vendor selection a. Record selection b. Present notice of further distribution c. Present link for additional details and opting out d. Present search interface again for additional selections, along with list of currently selected recipients 19. Repeat Search results and recordation of new selections</p>
<p>MyPal's interface indicates one or more dealers have been excluded due to Sally's personal blacklist (as stored in her personal data store). Sally double checks that list and totally agrees: Bob's Chryota is never getting her business again!</p>	
<p>20. Review list of blacklisted vendors</p>	<p>21. Display vendors blacklisted by Sally and excluded in vendor Searches for this pRFP.</p>

<p>Based on Sally's searches, MyPal suggests two additional vendors, one an online car dealer and another a car broker near Sally's home. Sally decides not to include those two in her recipient list.</p>	
	<p>22. Display suggested vendors outside Sally's search criteria.</p>
<p>As she reviews possible recipients, MyPal displays the reputation information available for each Vendor. Sally drills down on the reputation details for two of the vendors, using MyPal's tracking data. At this point, she decides not to pay for the details provided by any of the third party reputation services.</p>	
<p>24. Review additional reputation information</p> <p>26. Ignore fee-based reputation detail</p>	<p>23. Display reputation along with each vendor, with link to more information.</p> <p>25. Present additional reputation information for selected vendors, offering deep-dive details for a fee.</p>
<p>When submitting this information, Sally authorizes MyPal, eBay, and Equifax¹ as reputation providers for this transaction, linking this particular pRFP to Sally's reputation and tells Vendors that this transaction will be recorded for reputation tracking (of both Sally and the Vendor) at those three services. In exchange for this tracking information, the reputation providers agree to incorporate this transaction in future reputation scores and to provide a current reputation score to approved Vendors on a freemium business model: a simple score for free, details for a fee, while depersonalizing all information presented to help protect Sally's privacy.</p>	
<p>27. Select MyPal, eBay and Equifax as reputation providers.</p> <p>29. Log in to eBay & Equifax to authorize tracking this pRFP for reputation purposes.</p>	<p>28. Record selection of reputation providers. Register pRFP with each reputation provider and redirect to Sally for authorization.</p> <p>30. Store token/certificate/identifier from each reputation provider for future use.</p>
<p>Sally also specifies that all questions asked during the pRFP process will be confidential, as will be their answers.</p>	
<p>31. Specify a confidential communications for Q&A about the pRFP</p>	<p>32. Record Q&A communications preference.</p>
<p>After a final review of the details, Sally tells MyPal to publish the pRFP, selecting the £25 option that will process offline paperwork, contact legacy vendors who haven't yet registered with MyPal, and host a protected inbox for communications with vendors. MyPal sends a notice to all of the Vendors on Sally's recipient list, giving them a way to review the pRFP once they agree to Sally's terms of use. For legacy vendors, MyPal makes a phone call, letting them know about the pRFP and recommending they sign up through their relationship with Chryota.</p>	

¹ These companies don't currently offer anything like this

<p>34. Review & Publish pRFP, accepting the £25 fee for MyPal's offline integration services.</p>	<p>33. Present final pRFP details for review & confirmation.</p> <p>35. Bill for services using existing payment mechanism</p> <p>36. Contact existing vendors.</p> <ul style="list-style-type: none"> a. MyPal automatically sends notices to registered vendors, providing the URL for accessing the RFP information. b. For non-registered vendors, MyPal contacts them directly, via telephone. Since all the vendors chosen by Sally are Chryota Authorized, MyPal recommends they simply sign up for the HEARING AID program to access the waiting pRFP. <p>37. After authenticating authorized dealers, MyPal provides access to the pRFP, including means for the dealer to contact Sally.</p>
<p>Sally receives inquiries from two of the Vendors through MyPal, to which she replies. In her replies, she specifies that she wants the dealer to login to view her reply, rather than sending the message in clear text directly to the recipient</p>	
<p>40. Read inquiry</p> <p>42. Respond to question, requesting MyPal require login to read her answer.</p>	<p>38. Receive inquiry from Dealer, store locally</p> <p>39. Notify Sally of inquiry</p> <p>41. Display inquiry with links to pRFP and respond interface</p> <p>43. Store Sally's response with pRFP and notify Dealer of response.</p> <p>44. After Dealer login, display the response</p>
<p>She ultimately receives offers meeting her criteria from three Vendors; those offers are hosted at MyPal.</p>	
<p>46. Review offers</p>	<p>45. MyPal accepts incoming responses to the pRFP from three vendors.</p> <ul style="list-style-type: none"> a. Authenticate vendors b. Store proposal c. Notify Sally of pRFP responses
<p>After receiving the offers, Sally calls Chryota of London and asks some additional questions. She takes notes on the conversation, which are stored along with the Vendor's offer at MyPal.</p>	
<p>47. Get phone # from MyPal</p> <p>48. Call Chryota of London</p> <p>49. Take notes on the conversation</p>	<p>48. Display unique telephone # for Chryota of London.</p>

	<p>50. Add text note to pRFP</p> <ul style="list-style-type: none"> a. Associate note with Chryota of London's response to pRFP b. Record date & time of note
<p>Sally sends her husband a link to the offer (provisioning access via MyPal, and specifying her husband's contact service, LinkedFace) and asks what he thinks.</p>	
<p>50. Ask husband for input on the deal</p> <ul style="list-style-type: none"> a. Provision husband for pRFP access, using his contact service, LinkedFace. b. Add a quick note asking for his opinion. c. Specifies to include the note but not the pRFP details in the notification. <p>54. Authenticate into LinkedFace (proving to her husband's service that she is his wife)</p>	<p>51. Provision husband for access</p> <p>52. Start sending husband note</p> <ul style="list-style-type: none"> a. Use discovery to find husband's preferred communications channel at his contact service <p>53. On authentication challenge from LinkedFace, send Sally to authentication web page.</p> <p>55. After authentication, redirect Sally back to MyPal</p> <p>56. Send message to husband using his preferred communications channel indicating a message from Sally is waiting at MyPal</p>
<p>He likes it, but doesn't want the proposed audio system, suggesting a different model, just out from Bose.</p>	
<p>55. Husband reads & replies to the message.</p> <ul style="list-style-type: none"> a. Reads the note in email client b. Click on URL for pRFP c. Log in to MyPal using iName <p>57. Authenticate at iName provider</p> <p>61. Add a comment to Sally on the pRFP</p>	<p>56. Redirect to iName provider for authentication</p> <p>58. After authentication, redirect to MyPal</p> <p>59. Display pRFP</p> <p>60. Provide interface for comments & additions</p> <p>62. Notify Sally of the new comment.</p>
<p>Sally sends a quick message to the Vendor, using MyPal to track the conversation, asking for the alternate sound system. The Vendor replies with an updated offer.</p>	
<p>63. Sally asks Chryota of London for a revised Proposal with the new sound</p>	<p>64. Notify Chryota of London of an update on the pRFP and display the request when they log in to read it.</p>

system.	65. MyPal accepts the updated offer from Chryota of London, notifying Sally of the update.
<p>Sally likes it and decides to pay £25 for Equifax's detailed reputation history for Chryota of London. She finds a history of recent transactions as well as reviews from actual customers in her area. Some of the reviews aren't so glowing, but they seem rare and from the comments, the customer may have been the unreasonable party.</p>	
<p>66. Request detailed reputation history from Equifax</p> <p>68. Review Chryota's detailed reputation history.</p>	<p>67. MyPal provides Equifax's details to Sally</p> <ul style="list-style-type: none"> a. MyPal verifies approval for the £25 on the credit card currently on file. b. MyPal charges the credit card c. MyPal purchases the details through Equifax's online API d. MyPal downloads the purchase details, stores it with the pRFP and presents it
<p>After one last surf around the net to check out her alternatives, Sally makes her decision and commits to the sale, taking her to Step 4 of the Car Buying Engagement Model.</p>	
<p>69. Commit to the purchase</p> <p>71. Confirm the details of the purchase</p>	<p>70. Confirm the details of the purchase with Sally</p> <p>72. Record the purchase and notify Chryota of London of their successful bid.</p> <p>73. Chryota of London downloads the Purchase Order, including financial details for the deposit and commits the sale to its books.</p>

Narrative - Jimmy's & Frank's Experience

In this narrative, the users are Jimmy at Chryota Manufacturing and Frank at Chryota of London. The primary systems involved are the Chryota Manufacturing CRM system (CM), the Chryota of London CRM system (CoL), and MyPal.

The narrative is triggered by MyPal when Sally publishes the pRFP in step 34 of her Narrative.

Precursor: Chryota Manufacturing has already registered all of its Authorized Dealers at MyPal as pRFP processor. Each of those dealers that have signed up for Chryota's HEARING AID program have installed pRFP compatible software capable of processing incoming pRFPs.

User Intent	System Responsibility
<p>Frank's CRM system at Chryota of London (CoL) is the first point of contact for Sally's pRFP from MyPal. Upon receiving the notice of the pRFP, the software automatically evaluates the terms of use, generates a non-repudiatable proof of acceptance of those terms, and uses proof of acceptance at MyPal to download the pRFP. The pRFP is recorded in the CoL CRM system as a sales lead and forwarded to the central Chryota CRM system, which Jimmy sees, in accordance with the permission for further distribution authorized in the delivery envelope (as per Sally's instructions to MyPal).</p>	
	<ol style="list-style-type: none"> 1. MyPal notifies Chryota of London of incoming pRFP. <ol style="list-style-type: none"> a. uses prearranged secure communications channel to send pRFP invitation to CoL 2. CoL processes incoming pRFP invitation <ol style="list-style-type: none"> a. Parse incoming pRFP Notice <ol style="list-style-type: none"> i. pRFP Notice Label (identifying this as a pRFP Notice) ii. pRFP Notice ID iii. pRFP version iv. pRFP URL (globally unique ID for this pRFP) v. pRFP Respondant ID (Chryota of London) vi. pRFP authorized recipient machineID vii. pRFP broker ID viii. required terms <ol style="list-style-type: none"> 1. Proof of signed Standard Information Sharing Agreement (SISA) 2. Signed statement agreeing to specific terms of use for this pRFP information <ol style="list-style-type: none"> 1. Standard pRFP terms as defined in SISA, acting as pRFP Respondant b. Request pRFP from URL <ol style="list-style-type: none"> i. Prepare required terms (proof of agreement) ii. Use secure channel to present terms & download pRFP information iii. MyPal records the proof of acceptance of terms and logs the information download c. Parse & Store pRFP information <ol style="list-style-type: none"> i. Related Search history ii. Related Web Captures iii. Vendor Blacklist iv. Financial Credentials v. Buyer's Address vi. Broker's Service Endpoint vii. Terms of Use

	<ul style="list-style-type: none"> viii. Approved distribution list d. Notify Chryota Manufacturing of pRFP Response <ul style="list-style-type: none"> i. Verify Chryota Manufacturing is on Approved Distribution List ii. Create pRFP Response Notice <ul style="list-style-type: none"> 1. pRFP response DocType 2. pRFP response URL (globally unique ID for this pRFP at CoL) 3. pRFP URL (globally unique ID for the pRFP at MyPal) 4. pRFP Respondant ID (Chryota of London) 6. pRFP distribution recipient (Chryota Manufacturing) 7. pRFP authorized distribution recipient machineID (@Chryota) 8. pRFP broker ID 9. required terms <ul style="list-style-type: none"> A. Proof of signed Standard Information Sharing Agreement (SISA) B. Signed statement agreeing to specific terms of use for this pRFP information <ul style="list-style-type: none"> i. Standard pRFP terms as defined in SISA, acting as pRFP Secondary Recipient iii. Send pRFP Response to Chryota Manufacturing over secure channel 3. Chryota Manufacturing processes pRFP Response <ul style="list-style-type: none"> a. Chryota receives the pRFP Response notice from Chryota of London over a secure channel b. Parse incoming pRFP Response notice c. Request pRFP Response from URL <ul style="list-style-type: none"> i. Prepare required terms (proof of agreement) ii. Use secure channel to present terms & download pRFP Response information iii. CoL records the proof of acceptance of terms and logs the information download d. Parse & Store pRFP Response information <ul style="list-style-type: none"> i. pRFP information ii. pRFP Response information iii. pRFP Response Terms of Use
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Given Sally's financial credentials, reputation, and shopping timeframe, her pRFP escalates to the top of Frank's incoming priority list. He reviews what she is looking for, and his CRM system automatically pulls up inventory at his dealership that meets all of the automatically verifiable criteria.

- 5. Frank Reviews pRFP
 - a. Logs in to CoL CRM
 - b. Receives notification of new pRFP
 - c. Pulls up pRFP and related internal analytics and tools

- 4. CoL Escalates Sally's pRFP
 - a. CoL's software automatically analyzes the pRFP information provided by MyPal
 - b. Based on internal criteria, Sally's pRFP is flagged as a priority
 - c. Frank is notified of Sally's pRFP
- 6. Present Sally's pRFP and related information
 - a. Key pRFP information
 - i. Vehicle
 - ii. Target Price
 - iii. Delivery Timeframe
 - iv. Payment preference & Financials
 - b. Internal Analytics & Inventory
 - i. Sales priority
 - ii. Inventory matches
 - iii. Promotional Opportunities
 - iv. Pricing tools
 - v. Fulfilment tools
 - 1. Chryota Paperwork Reduction Options
 - A. DVLA Registration
 - B. Congestion Permitting
 - C. Insurance
 - 2. Customization
 - A. In-house services
 - A. Preferred Vendors
 - 3. Payment Tools
 - 4. Delivery Options
 - c. Additional pRFP Details
 - i. Vehicle specifics
 - ii. Custom requests
 - iii. Internal CoL Tracking ID

Frank reviews the options and considers Sally's special requests. The easy one is the DVLA and permitting for the congestion charge administrator. His dealership routinely handles these matters for buyers and he's been looking forward to trying out the new semi-automated system provided by Chryota. He marks that criteria as met, with a brief note and indicating no price impact. He also connects the pRFP to the Chryota's paperwork reduction system so that the DVLA and congestion permitting will be handled as quickly as possible should they win the deal.

<p>7. Review custom requests</p> <p>9. Review first custom request</p> <p>11. Address first custom request</p> <ul style="list-style-type: none"> a. Read request b. Read relevant internal links c. Add brief note d. Estimate price impact of \$0 e. Estimate schedule impact of \$0 f. Link pRFP to Chryota's Paperwork Reduction System, selecting DVLA registration and congestion permitting g. Mark status as fulfilled 	<p>8. Display custom requests</p> <p>10. Display detail screen for custom request</p> <ul style="list-style-type: none"> a. Full text of customer request b. Top related internal links (based on semantic analysis) c. Price impact tool d. Annotation tool e. Internal search tools f. Request status widget <p>12. Accept request updates</p> <ul style="list-style-type: none"> a. Record updated details b. Update pricing & schedule models c. Record DVLA & permitting requests as explicit Fulfillment Options (to be processed by Chryota's system if CoL wins the pRFP). d. Set status as request fulfilled
<p>For the second request, the custom color, Frank picks up his phone and calls his favorite custom paint shop, asking for a price quote. He gets about two of these every month and the shop loves to work with the dealership. Within 15 minutes he has a firm, fixed price quote faxed to him from the shop. The fax isn't printed out. It goes directly into the CRM system, routed to Frank. Frank attaches the digital fax to the pRFP as an internal supplement (not to be redistributed), marking the criteria met, and entering the appropriate price impact (based on the shops price plus 10%).</p>	
<p>13. Review second custom request</p> <p>15. Address second custom request</p> <ul style="list-style-type: none"> a. Read request b. Pull up phone number for paint shop <p>17. Call paint shop and request quote</p> <ul style="list-style-type: none"> a. Verbally describe car & request b. Provide internal tracking ID c. Request fax to CRM fax #, reference tracking ID# d. Annotate pRFP to note phone call to Dealer <p>20. Review Fax & Update record</p> <ul style="list-style-type: none"> a. Enter price impact b. Enter schedule impact b. Mark status as request fulfilled 	<p>14. Display detail screen for custom request</p> <p>16. Display list of preferred vendors</p> <p>18. Record annotation</p> <p>19. Receive Fax from Paint Shop</p> <ul style="list-style-type: none"> a. Route digital fax to incoming receptionist b. Receptionists reads sales ID# and attaches fax to pRFP c. CRM system notifies Frank of incoming Fax <p>21. Accept request updates</p> <ul style="list-style-type: none"> a. Record updated details b. Update pricing model c. Update schedule estimates

	<p>d. Set status as request fulfilled</p>
<p>Finally, Frank reviews the delivery details and links the pRFP to their internal delivery scheduler, which confirms a £100 price impact, which is automatically entered into the pRFP tracking record.</p>	
<p>22. Process delivery details</p> <p>24. Select a delivery option</p>	<p>23. Present delivery scheduler</p> <ul style="list-style-type: none"> a. Present delivery options for customer's address b. Present scheduling conflicts for proposed delivery window based on estimated sales dates c. Present possible price impacts depending on actual delivery date and means <p>25. Record delivery option</p> <ul style="list-style-type: none"> a. Record estimated delivery date in scheduler b. Update pRFP with pricing impact
<p>Before preparing a final offer, Frank sends an inquiry to Sally asking if the initial £10,000 payment will be made in cash at the dealer, by personal or cashier's check through the post, by electronic check, or did she have another idea? The question is entered into the CoL CRM, which forwards it to Chryota's HEARING AID software and attaches the inquiry to the pRFP and automatically submits the message to MyPal. Sally's reply the next day clarifies that electronic check would be preferred. The reply is routed through MyPal to Chryota of London, automatically attached to the customer record, alerting Frank to the incoming message, and a copy is also sent to Chryota. Frank reads the message and updates the record with Sally's payment preference.</p>	
<p>26. Ask customer a question</p> <p>[29. Sally responds to inquiry.]</p>	<p>27. Handle sales inquiry for pRFP (CoL)</p> <ul style="list-style-type: none"> a. CoL records the message internally b. CoL copies message to Chryota Manufacturing c. CoL sends message to MyPal, using the Preferred Contact Channel specified in the pRFP <p>28. Handle sales inquiry for pRFP (MyPal)</p> <ul style="list-style-type: none"> a. Accept incoming message from authorized pRFP Respondant b. Record message c. Notify Sally of inquiry <p>30. Handle inquiry response (MyPal)</p> <ul style="list-style-type: none"> a. Record Sally's response to the inquiry, attached to pRFP b. Forward to pRFP Respondant as pRFP Inquiry Response <ul style="list-style-type: none"> i. Package response as pRFP Inquiry Response <ul style="list-style-type: none"> A. pRFP Inquiry Response DocType (identifying this as a pRFP Inquiry Response) B. pRFP Inquiry Response ID C. pRFP ID

<p>32. Process sales inquiry response</p> <ul style="list-style-type: none"> a. Review response b. Update Payment Options 	<ul style="list-style-type: none"> D. pRFP Respondant ID E. pRFP Broker ID F. pRFP Inquiry ID G. pRFP Inquiry Response ii. Use prearranged secure communications channel to send pRFP invitation to CoL <p>31. Handle inquiry response (CoL)</p> <ul style="list-style-type: none"> a. Parse incoming response b. Attach response to pRFP c. Forward response to CM d. Notify salesperson of response <p>33. Record updated payment option</p> <ul style="list-style-type: none"> a. Echo update to CM
<p>Frank walks over to his supervisor's office, bringing his tablet computer with the pRFP and offer ready for review. His boss pulls up the pRFP record on his machine, asks a few questions, and electronically approves the offer. Chryota of London's CRM system packages the offer and sends it to MyPal, which notifies Sally. CoL also sends a copy of the offer to Chryota's HEARING AID program.</p>	
<p>34. Submit pRFP Response for approval</p> <p>36. Review pRFP Response (Frank's boss)</p> <p>38. Approve pRFP Response (Frank's Boss)</p>	<p>35. Handle pRFP Response approval request</p> <ul style="list-style-type: none"> a. Update pRFP Response status b. Notify Frank's supervisor <p>37. Display pRFP Response Details</p> <p>39. Handle pRFP Response approval confirmation</p> <ul style="list-style-type: none"> a. Update pRFP Response status b. Send copy to CM c. Send pRFP Response to MyPal
<p>Jimmy's dashboard presents a running view of the status of all pRFPs, resulting offers, and finalized deals, including key analytics and metrics about cost of acquisition, estimated manpower per sale, margins, and projected time-to-sale. Jimmy keeps on top of these numbers, because he knows their equivalents in the traditional advertising & sales funnel for Chryota. So far, people are coming in at a lower cost of acquisition, and apparently further along in the purchasing process, which is resulting in a rather attractive time-to-sale.</p>	
<p>40. Reviews program metrics</p>	<p>41. CM presents ongoing metrics based on incoming updates from all authorized dealers in the program</p>

<p>Within an hour, Frank gets a call from Sally, routed directly to him based on the phone # she called, which also pulls up the pRFP record on his computer. Sally asks about the paint shop that would be doing the work. Frank explains who would be doing it, sharing a story about one of the more memorable projects from last spring. Sally mentions she's heard horrible things about Mike's paint shop and wanted to be sure her new car would be well taken care of. Frank is able to assure her and adds a note to the pRFP that the quality of the paint job is especially important to Sally. Sally thanks him and lets him know she's probably going to make a decision in the next two days and hangs up. The call is automatically noted in the Chryota of London CRM system, and propagated up to Chryota's HEARING AID program, becoming part of the sales funneling on Jimmy's analytic dashboard. Frank writes up a quick summary of the call and updates the estimates for closing the deal and timeframe. The HEARING AID system not only combines these estimates for analysis, it also learns how good Frank is at his estimates and adjusts accordingly, giving the overall numbers the highest possible accuracy.</p>	
<p>43. Handle incoming call (Frank)</p> <ul style="list-style-type: none"> a. Answer phone b. Confirm caller's identity and the pRFP in question c. Listen to question d. Pull up details on paint shop <p>45. Address caller's question</p> <ul style="list-style-type: none"> a. Respond to question b. Make note in call tracking software 	<p>42. Process incoming call (CoL)</p> <ul style="list-style-type: none"> a. Identify call by unique incoming phone # b. Route call to Frank c. Automatically link Frank to sales call tracking software, which is itself already linked to the pRFP <p>44. Display details on Paint Shop</p> <p>46. Record call details</p> <ul style="list-style-type: none"> a. Store note from salesperson b. Record call information (time, duration, caller ID, etc.) c. Update CM with call details
<p>Sally's request for a different sound system is routed directly to the CoL and from there to Chryota's HEARING AID program. Frank is notified via SMS that he has an incoming pRFP update. He reviews the request and is surprised, because he hadn't heard about the new sound system from Bose. He asks his supervisor if knows about it and it is new to him as well. Frank searches online to see what he can find out, and in fact, Bose just announced the new system today. He pulls up the contact information for the dealership's Bose representative and calls to ask about the new systems pricing and availability. The rep gives him the standard dealer rate and confirms he can get the system in to the dealership in two days from order. Frank requests a confirmed quote, the Bose rep faxes over the details, which, just like the paint shop quote, get attached to the pRFP and the price impact added. With the new price, Frank triggers an update on the CoL CRM, which automatically propagates to the HEARING AID program and the pRFP at MyPal, which notifies Sally.</p>	
	<p>47. MyPal notifies Chryota of London of adjustment to the pRFP.</p> <ul style="list-style-type: none"> a. MyPal packages Sally's request as a pRFP Adjustment

<p>49. Review adjustment</p> <ul style="list-style-type: none"> a. Review adjustment b. Research request online c. Capture online research notes <p>51. Look up representative's #</p> <p>53. Call representative</p> <ul style="list-style-type: none"> a. ask about the new system b. record notes c. enter price & schedule impact d. Mark adjustment addressed e. Submit adjusted pRFP for approval 	<ul style="list-style-type: none"> i. pRFP Adjustment DocType ii. pRFP Adjustment Identifier iii. pRFP Identifier iv. pRFP Respondant Identifier v. Requested adjustment Description vi. Requested adjustment Structured Data (none) <p>b. uses prearranged secure communications channel to send pRFP adjustment to all authorized recipients (including CoL)</p> <p>48. CoL processes pRFP adjustment</p> <ul style="list-style-type: none"> a. Parse pRFP adjustment b. Store adjustment c. Notify sales person of adjustment <p>50. Record research notes</p> <p>52. Present Partner Contact Info</p> <ul style="list-style-type: none"> a. Record call notes <p>54. Record adjustment</p> <p>55. Process pRFP Approval (same as prior)</p>
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Use Cases

1. Provision Use of Specific Information on Specific Terms
 - 1.1. First Party Recipient
 - 1.1.1. Sally's mobile phone App access to MyPal pRFP service
 - 1.1.2. MyPal's access to pre-pRFP information at Sally's Personal Data Store.
 - 1.1.3. Chryota of London's access to pRFP and subsequent related communications
 - 1.2. Second Party Recipient
 - 1.2.1. Chryota Manufacturing's access to Chryota of London's pRFP Response and related communications.
2. Send Message
 - 2.1. Notification of availability of rights-controlled information
 - 2.2. Structured Message under previously agreed upon terms
 - 2.2.1. pRFP Response
 - 2.2.2. pRFP Communication (Inquiry/Response)
 - 2.2.3. pRFP Adjustment

- 2.2.4.pRFP Response Adjustment (Requiring update to pRFP issuer)
- 2.2.5.pRFP Response Update (for synchronization of record)
- 2.3. Notification to Sally of pRFP activity
- 3. Request/Release Information on Specific Terms
 - 3.1. pRFP release from MyPal to CoL
 - 3.2. pRFP release from CoL to CM
- 4. pRFP Recipient Search Mechanism (Vendor discovery tool)
- 5. Data Manipulation Interfaces (CRUD²)
 - 5.1. pRFP
 - 5.2. pRFP Response
 - 5.2.1. Custom Request
 - 5.2.2. Scheduler
 - 5.2.3. Price Estimator
 - 5.2.4. Incoming Call
 - 5.2.5. Incoming Fax
 - 5.3. pRFP Communication (Inquiry)
 - 5.4. pRFP Communication (Response)
 - 5.5. pRFP Adjustment (Communication with impact on product, pricing, terms)
 - 5.6. pRFP Response Adjustment
 - 5.7. pRFP Response Request for Approval
 - 5.8. pRFP Response Approval
- 6. Data Evaluation/Analysis/Transformation
 - 6.1. pRFP Template fill
 - 6.2. Customer Qualification (prioritization of Sally as potential car buyer)
 - 6.3. Pricing Model
 - 6.4. Schedule Model
 - 6.5. Aggregate Dashboard
- 7. Third Party Credentials
 - 7.1. Credit Union Financing
 - 7.2. Reputation
- 8. Transactions
 - 8.1. £25 for pRFP
 - 8.2. £25 for Equifax Vendor Reputation Report
- 9. Third Party Registrar/Observer
 - 9.1. Reputation Provider
 - 9.1.1. for pRFP (Sally's reputation)
 - 9.1.2. for Transaction (Vendor's reputation)
 - 9.2. MyPal for pRFP Recipient terms from CoL and other authorized Recipients

² CRUD = Create, Read, Update, Delete, the basic actions for data records. Confirmations and approvals are simply updates to the state of a particular record.

- 9.3. CoL for Secondary pRFP Recipient terms from CM
- 10. Authentication
 - 10.1. User Authentication
 - 10.1.1. Sally to MyPal
 - 10.1.2. Sally to Mr. Doorman
 - 10.1.3. Sally to Husband's iBroker
 - 10.1.4. Frank to CoL
 - 10.1.5. Jimmy to CM
 - 10.2. Machine Authentication
 - 10.2.1. MyPal to Mr. Doorman
 - 10.2.2. CoL to MyPal
 - 10.2.3. CM to CoL
 - 10.2.4. Reputation Providers to MyPal
 - 10.2.5. MyPal to Reputation Providers

Standard Information Sharing Agreement Requirements

Based on this engagement model, we suggest the following should be addressed in the Standard Information Sharing Agreement.

- 1. Standard Rights, Obligations, and Liabilities for
 - 1.1. pRFP Issuer
 - 1.2. pRFP Broker
 - 1.3. Facilitators
 - 1.4. pRFP Respondants
 - 1.5. Second Party Recipients
 - 1.6. Credential Providers
- 2. Rights, Obligations, and Liabilities in all cases, the master agreement
- 3. Rights, Obligations, and Liabilities particular to specific information transactions
 - 3.1. pRFP and related communications
- 4. Data
 - 4.1. Scope
 - 4.2. Derivative Data
 - 4.3. Use
 - 4.4. Security
 - 4.5. Retention
 - 4.6. Propagation
 - 4.7. Quality (warrants by information issuer)
 - 4.8. Maintenance (capability provided by information recipient to information issuer)
 - 4.9. Transparency (capability provided by recipient user to information issuer)
- 5. Extraordinary exceptions
 - 5.1. Legally required disclosure

- 5.2. Security breach
- 6. Identity
 - 6.1. Assurance of legal entities
 - 6.2. Assurance of mechanical entities
- 7. Contract Maintenance
 - 7.1. Signature
 - 7.2. Recordation
 - 7.3. Third party Registration
 - 7.4. Notice
 - 7.5. Termination

Glossary

1. **Individual** – A natural person, a single human being. *Sally, Jimmy, Frank*
2. **Authorizing Individual** – An Individual who has shared information with a Receiving Party. *Sally*
3. **Entity** – A corporate person, an individual or individuals operating as a business, a government agency, or a non-governmental organization (NGO). *Chryota, Chryota of London, DVLA*
4. **Information** – Usable facts or relationships presented in context; data shared for use in a specific context.
5. **Data** – Information encoded for storage or transmission (may or may not retain context).
6. **Shared Information** – Information voluntarily provided to a Receiving Party under specific terms of use. *pRFP, vendor blacklist.*
7. **Service Provider** – An individual or entity providing value to other Individuals or Entities through an interactive system.
8. **Recipient (R)** – A Service Provider that views and uses Shared Information. Also Authorized Recipient. (The use case doesn't cover unauthorized Recipients) *Chryota, Chryota of London*
9. **pRFP Respondant (R)** – Recipient of a pRFP. To be distinguished from the recipient of a pRFP Notice because a Respondant must have provided evidence of agreement to the pRFP Terms of Use.
10. **Facilitator (F)** – A Service Provider that facilitates Information Sharing, but does not itself view or use the shared information itself. Examples include Data Hosts, Authorization Managers, and Internet Service Providers. As a litmus test, if the Service Provider could do its job without decrypting potentially encrypted Shared Information, then it qualifies as a Facilitator with respect to that information. Whether or not a Facilitator chooses to protect such information using encryption or other security policies is a business decision of the Facilitator and does not change its role as Facilitator. For example, quality control, maintenance, debugging, and customer service are just a few areas where a Facilitator may incidentally have access to the underlying information without violating its nature as a Facilitator and not a Receiving Party. *Messages, Inc., Mr. Doorman.*
11. **Hybrid Service Provider** – A Service Provider that acts both as a Facilitator and as a Recipient depending on the interaction. *MyPal*

12. **Personal Data Store (PDS)** – A distributable repository of information sharable by an individual, stored at one or more Data Hosts whose access is moderated under the direction of an Authorizing Individual using an Authorization Manager.
13. **Host (H)** – A Facilitator that stores data on behalf of individuals, for access by Recipients. *MyPal, MyStuff*
14. **Authorization Manager (AM)** – A Facilitator that moderates access to a Host under the direction of an authorizing individual. *MyPal, Mr. Doorman*
15. **Vendor** – An Entity or Individual offering a product or services "for sale". *Chryota, Chryota of London, Bose, Custom Paint Shop*
16. **Agency** – An Entity providing services to the public, typically governmental or not-for-profit.

Outstanding Issues

Update this section as issues are resolved.

Notes/Comments/Not Yet Integrated Content

Change History

Version	Date	Modified by	Comment
draft for review.v2	August 25, 2010	Joe Andrieu	Added timeframe for review period
draft for review.v1	August 17, 2010	Joe Andrieu	Incorporated feedback from Iain Henderson. Standardized to "personal data store" and "information".
working draft.v5	August 13, 2010	Joe Andrieu	First draft of Use Cases. Added Requirements for Standard Agreement. Added Actors & Systems Diagram
working draft.v4	August 4, 2010	Joe Andrieu	Completed first draft of Frank's Narrative
working draft.v3	July 19, 2010	Joe Andrieu	Completed first draft of Sally's Narrative.
working draft.v2	June 22, 2010	Joe Andrieu	Split IT system between Chryota and Dealer
working draft.v1	June 20, 2010	Joe Andrieu	First draft.