Exhibit A - Professional Services Description
Client Engagement Suite - Relationship Management

I. **Overview.** This service agreement includes outreach engagement services for the Customer's account contacts to engage within the Hosted Application.

II. **Zywave Team.** The Zywave Team assigned to perform the Relationship Management service will include a Research Specialist and Relationship Management representatives.

III. **Duration.** 8 Ongoing for the duration of the Term based on Customer responsiveness and availability.

IV. **Inclusions.** The following services will be provided as part of this agreement:

    a. **Account Research:**
        i. Contact research for outreach data in the event Customer is unable to provide data. This includes contact name, contact phone number, contact email, and contact title, which shall be utilized during outreach.

    b. **Client Portal End-User Outreach:**
        i. Outreach to at least one (1) contact per Customer client account via phone call with a branded follow-up email. Based on the outcome of outreach and available information of the first outreach attempt, the Relationship Management representatives will repeat this process up to three (3) times.
        ii. Relationship management engagement phone calls are for initial enrollment, and calls shall be made within 5-7 business days of the Relationship Management representative receiving complete contact information.

    c. **End-User Engagement Overview Calendar:**
        i. Access to a Bookings link to schedule an engagement call overview of the Client Portal on behalf of Customer's client.

V. **Exclusions.** The following activities are not included in this Agreement and, if applicable, require an additional service agreement:

    a. **Account Research:**
        i. Contact research for accounts without an accurate business name and zip code

    b. **Client Portal End-User Outreach:**
        i. On-site training or consulting at Customer's, Customer client's, or Zywave's physical location(s)

    c. **End-User Engagement Overview Calendar:**
        i. Changes to Bookings UI
        ii. Customized and/or group training
        iii. **S**upport requests and/or troubleshooting