

Exhibit A – Professional Services Description

Professional Services – Sales Cloud – Business – Employee Benefits - Standard

Overview. This service agreement includes services for the Customer's initial implementation of Sales Cloud Business. Additional components, not listed here, require additional services.

Zywave Team. The Zywave Team assigned to perform the Professional Services described in the agreement will include a Project Manager, Data Analyst, Product Trainer, and Implementation Consultant.

- I. **Estimated Duration.** 8-12 weeks from Initial Effective Date dependent upon Customer engagement.
- II. **Inclusions.** The following services will be provided as part of this agreement.
- a. **Initial Setup**
 - i. Product activation and system configuration
 - ii. Creation of initial administrative User on behalf of Customer
 - iii. Application of User permissions, data management access, and feature access
 - iv. Assignment of one (1) IP address and the associated “Send on Behalf” utility
 - v. Logo setup
 - b. **Data Services**
 - i. Zywave processes a one-time upload of accounts and contacts
 - ii. Zywave creates five (5) initial Dynamic/Static Distribution Lists for email marketing
 - iii. Zywave processes a one-time miEdge data import into Account Management for immediate prospecting use
 - c. **Training**
 - i. One-On-One training reviewing prospecting, email marketing, and quoting best practices.
 - ii. One (1) One-On-One Solutions Overview session, reviewing core workflows
 - iii. Live group training and on-demand training available via Zywave University
 - d. **Consulting**
 - i. One-on-One Post Training Consultation Calls
 - 1. Customer discovery to learn more about goals and expectations
 - a. Conduct end-to-end quoting review process ahead of presenting proposals to prospective clients
 - i. Utilizing client data to provide quoting examples
 - ii. Custom plan management and creation to supplement existing carrier plans already populated within system
 - iii. Proposal best practices regarding output options and utilizing contribution modeling
 - b. Lead generation techniques including prospect search recommendations and utilizing search data within other Zywave solutions, based on industry focus
 - 2. Automated Marketing Strategy
 - a. Utilizes the Distribution Lists created during setup to be used as contact recipients in email marketing
 - 3. Quoting Strategy
 - a. One-on-one review of quoting resource templates and usage within Zywave CPQ

- b. Zywave creates one (1) sample proposal template within Zywave CPQ on behalf of Customer
- c. Zywave created one (1) sample Enrollment Benefit Booklet within Zywave CPQ on behalf of Customer that includes all standard plan type pages and up to three (3) customer sections.
- d. Initial configuration of Customer TIN, NPN, and Carrier suppression details within Zywave CPQ on behalf of Customer

- III. **Exclusions.** The following activities are not included in this agreement and, if applicable, require an additional service agreement and subsequent cost estimate.
- a. **Setup**
 - i. Additional setup beyond noted inclusions in section II.a.
 - b. **Data Services**
 - i. Additional data imports or data imports
 - ii. Data import for fields not specified in data template
 - iii. Setup or configuration of third-party integration on behalf of Customer
 - c. **Training**
 - i. On-site training at Customer or Zywave physical locations
 - ii. Additional one-on-one training sessions
 - d. **Consulting**
 - i. On-site consulting at Customer or Zywave physical locations
 - ii. Additional consulting sessions
 - iii. Ongoing system maintenance tasks including
 1. Creation of additional Distribution Lists
 2. Creation of additional Proposals, or updates to sample Proposal created in section II.d.3.
 3. Creation of additional Enrollment Benefit Booklets, or updates to sample Enrollment Benefit Booklets created in section II.d.3.
 4. Updates to Customer TIN, NPN, and Carrier suppression information on behalf of Customer
 5. Creation of email marketing templates on behalf of Customer
- IV. **Expiration.** All Professional Services are subject to the Zywave Cancellation Policy available at <https://www.zywave.com/training-cancellation-policy>. Any unused Professional Services Fees will expire 6 months from date of purchase. Any Professional Services performed following such expiration will require an additional Professional Services Fee at Zywave's then-current rates.
- V. **Billing.** The Professional Services Fee is due upon execution of this Agreement. Zywave will bill Customer for reasonable and actual travel, living expenses (if applicable) and related incidental expenses incurred by Zywave's personnel in rendering the Services.