

Exhibit A – Professional Services Description

Professional Services – Sales Cloud - Business – Personal Lines / P&C – Self

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, Product Trainer, and Website Implementation Team.

- I. **Estimated Duration.** 10-12 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
 - ii. Creation of one (1) initial administrative User on behalf of Customer
 - iii. Assignment of one (1) IP address and the associated “Send on Behalf” utility
 - iv. Logo setup
 - v. Initial connection of DecPage Connect with TurboRater
 - b. **Training**
 - i. Live group training and on-demand training available via Zywave University
 - c. **Website Development**
 - i. Initial Setup
 - 1. Product activation and User setup
 - 2. Activation of Zywave plan libraries for Personal Lines quoting
 - ii. Development
 - 1. System configuration for core application functionality
 - 2. System setup includes embedded schema to support search engine optimization (SEO)
 - 3. Standard features are activated in preparation for site’s launch, if applicable.
 - i. Location Editor
 - ii. Employee Directory
 - iii. Carrier Page
 - iv. Testimonials
 - v. Quote Forms
 - vi. Mission Statement
 - vii. About Us
 - 4. SSL Certificate installation
 - 5. Design and development for site layout and navigation based on currently available design themes
 - i. Request to change the selected design theme during or after development, may incur additional costs.
 - 6. Standard Zywave Website content package
 - 7. If a site migration from Legacy IWB is in scope and in compliance, consultation will be provided to ensure all relevant and compliant content from existing site is migrated over to the new layout. For avoidance of doubt, an in scope and in compliance site migration is limited to existing Zywave website Hosted Applications.

iii. Digital Marketing:

1. Access to dedicated Digital Marketing Specialist to align and strategize agency goals.
2. Initial Kickoff Call and Consultation
3. Access to monthly Live and On-Demand SEO webinars
4. Initial SEO homepage optimization (i.e. Keywords and search phrases)
5. Live demonstrations of administrative user features and functionality
6. Setup of Business Listing; up to five (5) locations
 - i. Only applicable to physical office locations
7. Updates to directory listings upon request
8. Digital Marketing activities designed to drive website traffic, which may include a variety of the following activities:
 - i. Website analytics setup
 - ii. Monthly website analytics reporting
 - iii. Delivery of monthly newsletter including digital marketing best practice and strategies
 - iv. Website Optimization
 - i. Site auditing and maintenance
 - ii. Content authoring
9. Access to Reputation Management Dashboard
10. Up to five (5) Google Business Profile page setup and optimization
 - i. Optimization and verification subject to Google guidelines
 - ii. Not including coworking spaces, remote and virtual office locations.

iv. Custom Content Services:

1. Delivered by the last day of the month after website launch.
2. Includes choice of one (1) custom website page with up to three (3) paragraphs of content, or one (1) custom blog per month up to 400 words.
3. Custom Content excludes compliance content and Zywave reserves the right to deny content topics.

v. Social Media Services:

1. Weekly Delivery: Services commence post-website launch, adhering to a standard schedule.
2. Facebook Setup & Posts: Platform setup with three (3) posts per week from predefined tracks, featuring curated images from approved media libraries. Posts will include a mix of business-related, fun, and holiday themes.
 - i. Note: Customization such as adding phone numbers or agency information is not available due to bulk scheduling.

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. **Training**

- i. On-site training at Customer or Zywave physical locations
- ii. One-on-one training sessions

c. **Website Development**

- i. Initial Setup:
 1. Configuration of IP addresses
 2. Email hosting
 3. Domain registration

4. Customized reports
- ii. Website Implementation Consulting & Initial Setup:
 1. Unlimited photo download from Media Manager
 2. Unlimited content migration from existing 3rd party platforms
 - i. Content migration will not exceed 20 pages. Additional page migration will incur additional fees, if the Customer wants Zywave to migrate content on their behalf.
 3. Specific types of custom design, custom development, and integration with 3rd parties such as the following: Logo and other marketing collateral creation or adjustment, API Integrations, website structural adjustments to templates or template parts, etc.
 4. Once Customer agrees to website layout, a Statement of Work will be required for any website layout change(s)
 5. Layout changes after initial implementation. A Statement of Work will be required for any ongoing layout changes.
 6. Foreign language translations. Spanish translations available for standard content at an additional fee.
- iii. Digital Marketing Services:
 1. Creation or customization of content beyond choice of one (1) custom website page or one (1) custom blog per month
 2. Google Business Profile page setup and optimization beyond the included (5)

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.