

Exhibit A - Professional Services Description

Professional Services – Sales Cloud – Performance – Employee Benefits

- I. **Overview.** This service agreement includes services for the Customer's initial implementation of the Hosted Application. Additional components, not listed here, require additional services.
- II. **Zywave Team.** The Zywave Team assigned to perform the Professional Services described in the agreement will include a Project Manager, Implementation Consultant, Product Trainer, and Data Analysts.
- III. **Estimated Duration.** 12-16 weeks from Initial Effective Date dependent upon customer engagement.
- IV. **Inclusions.** The following services will be provided as part of this agreement.
 - a. **Initial Setup:**
 - i. Site activation, user setup and core account and contact data load
 - ii. Logo setup
 - iii. Assignment of one (1) IP address and the associated "Send on Behalf" utility.
 - b. **Training:**
 - i. Access to Zywave University via On Demand and Group Instructor Led curriculum offerings.
 - ii. Unlimited Access to Zywave's Support Library providing:
 1. Smart Support Resources and best practices documentation
 2. Quick case submission
 3. Workflow documentation for end user use
 4. Community forum to ask and answer questions
 - iii. One-time Employee Benefits Agency Management System (AMS)
 - iv. End User roll-out training for servicers and sellers
 - c. **Data Services:**
 - i. Group Quoting
 1. For the Large Group Quoting feature, one import of up to 50 Plans including plan name, carrier name and supporting benefit items.
 - a. Additional plans can be added to the Agreement through a written notice to Zywave at the then current rate
 2. Activation of small group plan library for applicable supported states and carriers
 3. Activation of one currently supported Third-Party System Integration to Group Quoting for accounts, account contacts and plans.
 - ii. Employee Benefits AMS
 1. Conduct review of customer data for up to 500 accounts, including account, contact, plan and carrier data to support AMS functionality
 2. One-time conversion and import of Production data for accounts, account contacts, carrier contacts, plans, commission splits, and activities to support AMS functionality. Revisions to converted data will need to be made directly in the converted file format prior to import.
 - d. **Consulting:**
 - i. Implementation Consulting Services, including best practices and workflow documentation.
 - ii. Remote site system configuration
 - iii. Optional activation of Employee Benefits AMS Custom Web Services for 3rd party integration

- V. Exclusions.** The following activities are not included in this Agreement and, if applicable, require an additional service agreement and subsequent cost estimate:
- a. **Initial Setup:**
Additional assignments of IP address and the associated “Send on Behalf” utility allowing for email masking for content delivery
 - b. **Training:**
 - i. Customized and One on One training
 - ii. On-site training or consulting at Customer or Zywave physical locations
 - c. **Data Services:**
 - i. Data import for products not specified within Section IV.c.
 - ii. Customizations to or additional Third-Party System Integration(s) for Accounts and Plans - functionality and implementation
 - iii. Third-Party System Integration for Commissions -functionality and implementation
 - iv. Implementation of custom integrations leveraging Zywave Web Services
 - v. Zywave Report Center custom report creation
 - d. **Consulting:**
 - i. Custom graphic design work
 - ii. Upload of files and/or attachments
 - iii. Creation of custom e-mail templates
- VI. 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.
- VII. 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.