

Exhibit A - Professional Services Description

Professional Services – Sales Cloud – Performance – Personal Lines

- I. **Overview.** This service agreement includes services for the Customer's initial implementation of the cloud. 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, Website Implementation Consultant, Product Trainer, and Data Analysts, and Digital Marketing Specialist.
- III. **Duration.** 10 – 12 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. Product activation and user setup
 - ii. Activation of Zywave plan libraries for Personal Lines quoting
 - b. **Data Services**
 - i. As applicable, one-time data import of up to 400GB for currently supported fields via SFTP
 - c. **Consulting**
 - i. Implementation Consulting Services, including best practices and workflow documentation.
 1. Completion of initial setup and defaults configurations in AMX
 2. Validation of customer data pre and post conversion
 3. Two dedicated 1:1 consulting sessions covering any of the following:
 - a. Customer workflows
 - b. Quote and policy management
 - c. Carrier downloads
 - d. Automated marketing
 - e. Commissions
 - d. **Website Development**
 - i. Website product activation and user setup
 - ii. System configuration for core application functionality
 - iii. System setup includes embedded schema to support search engine optimization (SEO)
 - iv. Standard features are activated in preparation for site's launch, if applicable.
 1. Location Editor
 2. Employee Directory
 3. Web Links (ie. carrier information)
 4. Testimonials
 5. Quote Forms
 6. Mission Statement
 7. About Us
 - v. SSL Certificate installation
 - vi. Design and development for site layout and navigation based on currently available templates
 - vii. Standard Zywave Website content package
 - viii. If a site migration 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
 - e. **Digital Marketing Services:**

- i. Initial Kickoff Call and Consultation
- ii. Access to monthly SEO webinars
- iii. Initial SEO setup
 - 1. SERP Content Optimization, keywords and search phrases
- iv. Live demonstrations of administrative user features and functionality
- v. Setup of Business Listing; up to five (5) locations
- vi. Updates to directory listings upon request
- vii. Social Media platform setup for Facebook and up to three (3) posts per week for length of Term
 - 1. Social Media posts include: three (3) Line of Business-related Facebook posts per week, with curated images.
- viii. Digital Marketing activities designed to drive website traffic, which may include a variety of the following activities:
 - 1. Website Analytics setup
 - 2. Monthly website analytics reporting (ie. Google Search Console or Bing Webmaster tools)
 - 3. Marketing Strategy Emails
 - 4. Website Optimization
 - a. Site auditing (bi-annual)
 - b. Content authoring
 - c. Site Maintenance
- ix. Custom Content:
 - 1. Delivered monthly
 - 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 for length of Term.
 - 3. Custom Content excludes compliance content and Zywave reserves the right to deny content topics.
- x. Access Reputation Management Dashboard
- xi. Up to five (5) Google Business Profile page setup and optimization

d. **Training:**

- i. Access to Zywave University via On Demand and instructor led curriculum offerings available in English
- ii. Group instructor led curriculum offerings for Personal Lines quoting available via Zywave University in English and Spanish

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

a. **Initial Setup:**

- i. Configuration of IP Addresses
- ii. Email hosting
- iii. Domain registration
- iv. Customized reports

b. **Data Services**

- i. Additional data imports or data imports larger than 400GB
- ii. Data import for fields not specified in data template
- iii. Database backups
- iv. Raw files accessible for 30 days from initial delivery date to customer.

c. **Consulting**

- i. Additional 1:1 customer consulting sessions

- ii. Ongoing services including:
 - 1. Custom Accounting
 - 2. Commissions
 - 3. Custom Reports
 - 4. Configuration of carrier downloads and behalf of customer
- iii. Upload of files and/or attachments
- iv. Creation of custom e-mail templates
- d. **Training:**
 - i. Customized and One on One training
 - ii. On-site training or consulting at Customer or Zywave physical locations
- e. **Website Development:**
 - i. Third-party system integration
 - ii. Website design or development work
 - iii. Custom graphic design work
 - iv. Custom site development
 - v. Email hosting
 - vi. Domain registration
 - vii. SEO setup or maintenance
 - viii. Citations/directory listings for additional locations
 - ix. Creation or customization of content
 - x. Additional customization of social media or blog postings

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.