

## Exhibit A – Professional Services Description

### Professional Services – Sales Cloud - Starter – Employee Benefits – Premium

**Overview.** This service agreement includes services for the Customer's initial implementation of Sales Cloud Starter. 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.** 4-6 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. One (1) integration setup between compatible third-party application
  - c. **Training**
    - i. One-On-One training plan discussion with a Subject Matter Expert to deliver a training plan based on Customer’s needs
    - ii. Executed one-on-one training sessions covering topics outlined in initial planning discussion
    - iii. One (1) One-On-One Solutions Overview session, reviewing core workflows
    - iv. 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. One-on-one prospecting and email marketing strategy workflow discussions, 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
        - b. Zywave creates five (5) custom email marketing templates
          - i. Template content to encourage engagement and ways to increase email open rates
- 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. Ongoing maintenance for third-party integration
- 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 email marketing templates

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.