

Exhibit A – Professional Services Description

Professional Services – Sales Cloud – Starter – Personal Lines / P&C – Standard

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, Implementation Consultant, and Website Implementation Team.

- I. **Estimated Duration.** 6-8 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 one (1) initial administrative User on behalf of Customer
 - iii. Creation of initial end Users on behalf of Customer
 - 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 processes a one-time miEdge data import into Account Management for immediate prospecting use
 - iii. Zywave creates five (5) initial Dynamic/Static Distribution Lists for email marketing
 - c. **Training**
 - i. One-on-one training reviewing prospecting and email marketing 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. Application of User permissions, data management access, and feature access
 - ii. One-on-One Post Training Consultation Calls
 1. Customer discovery to learn more about goals and expectations
 - i. One-on-one prospecting and email marketing strategy workflow discussions, based on industry focus
 2. Automated Marketing Strategy
 - iii. Utilizes the Distribution Lists created during setup to be used as contact recipients in email marketing
 - e. **Website Development**
 - i. Initial Setup and Development
 1. Product activation and User setup
 - ii. Development
 1. System configuration for core application functionality
 2. Standard features are activated in preparation for website launch, if applicable.
 - i. Location Editor
 - ii. Employee Directory
 - iii. Carrier Page

- iv. Testimonials
 - v. Quote Forms
 - vi. About Us
- 3. SSL Certificate installation
- 4. 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.
- 5. Standard Zywave Website content package
- 6. 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. SEO Services:
 - 1. Access to Live and On-Demand SEO webinars
 - 2. Initial SEO homepage optimization (i.e. keywords and search phrases)
 - 3. Google analytics setup and dashboard creation
 - 4. Setup of Business Listing; up to three (3) locations
 - i. Only applicable to physical office locations.
 - 5. Updates to business directory listings upon request
- iv. 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.
- v. Training:
 - i. Access to Zywave University via On Demand and Group Instructor Led curriculum offering

III. **Exclusions.** The following activities are not included in this agreement and, if applicable, require an additional service agreement and subsequent cost estimate.

- f. **Setup**
 - i. Additional setup beyond noted inclusions in section II.a.
- g. **Data Services**
 - i. Additional data imports or data imports
 - ii. Data import for fields not specified in data template
 - iii. Third-party integration setup on behalf of Customer
- h. **Training**
 - i. On-site training at Customer or Zywave physical locations
 - ii. Additional one-on-one training sessions
- i. **Consulting**
 - i. On-site consulting at Customer or Zywave physical locations
 - ii. Additional consulting sessions

- iii. Ongoing system maintenance tasks including
- iv. Creation of additional Distribution Lists

j. **Website Development**

- i. Initial Setup:
 - 1. Configuration of IP Addresses
 - 2. Email hosting
 - 3. Domain registration
- ii. Training:
 - 1. Customized and One on One training
 - 2. On-site training or consulting at Customer or Zywave physical locations
- iii. 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.
- iv. SEO Services:
 - 1. Continued SEO Maintenance and auditing
 - 2. Creation or customization of content
 - 3. Digital Marketing activities designed to drive website traffic, which may include a variety of the following activities:
 - i. Dedicated Digital Marketing Specialist
 - ii. Strategy Emails
 - iii. Citations/directory listings outside of three (3) locations
 - iv. Custom Content including custom pages and custom blogs
 - v. Reputation Management Dashboard
 - vi. Google Business Profile page setup and optimization

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.