

Exhibit A – Professional Services Description

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

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, Data Analyst, Product Trainer, Implementation Consultant, 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 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
 - vi. Initial connection of DecPage Connect with TurboRater
 - vii. Activate Leads and Bind online codes for TurboRate for Zywave Website
 - 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, email marketing, and quoting best practices
 - ii. One (1) One-On-One Solutions Overview session, reviewing core workflows
 - iii. One-on-One training for TurboRater and Zywave Websites
 - iv. 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
 - iii. Carrier Rating Strategy
 - 1. Zywave to create two (2) auto quote templates and one (1) home quote template
 - 2. Bridging configuration between TurboRater and Zywave AMS solution, as applicable
 - iv. Automated Marketing Strategy
 - i. Utilizes the Distribution Lists created during setup to be used as contact recipients in email marketing
 - a. **Website Development**
 - i. Initial Setup
 - i. Product activation and User setup

- ii. Activation of Zywave plan libraries for Personal Lines quoting
- ii. Development
 - i. System configuration for core application functionality
 - ii. System setup includes embedded schema to support search engine optimization (SEO)
 - iii. 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
 - iv. SSL Certificate installation
 - v. 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.
 - vi. Standard Zywave Website content package
 - vii. 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:
 - i. Access to dedicated Digital Marketing Specialist to align and strategize agency goals.
 - ii. Initial Kickoff Call and Consultation
 - iii. Access to monthly Live and On-Demand SEO webinars
 - iv. Initial SEO homepage optimization (i.e. Keywords and search phrases)
 - v. Live demonstrations of administrative user features and functionality
 - vi. Setup of Business Listing; up to five (5) locations
 - i. Only applicable to physical office locations
 - vii. Updates to directory listings upon request
 - viii. 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
 - ix. Access to Reputation Management Dashboard
 - x. 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:
 - i. Delivered by the last day of the month after website launch.
 - ii. 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.
 - iii. Custom Content excludes compliance content and Zywave reserves the right to deny content topics.

- v. Social Media Services:
 - i. Weekly Delivery: Services commence post-website launch, adhering to a standard schedule.
 - ii. 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. **Data Services**
 - i. Additional data imports or data imports
 - ii. Data import for fields not specified in data template
 - iii. Creation of 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 email marketing templates
 - 3. Creation of additional TurboRater locations, or updates to TurboRater locations created in section II.c.
 - 4. Creation of additional TurboRater quote templates, or updates to TurboRater quote templates created in section II.c.
 - iv. Continued configuration work of DecPage Connect
 - e. **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 five (5) pages

- III. **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.
- IV. **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.