

Exhibit A – Professional Services Description

Professional Services – BrokerageBuilder - Standard

Overview. This service agreement includes services for the Customer's initial implementation of BrokerageBuilder. 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.** 12-16 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. Creation of initial end users on behalf of Customer
 - iv. Application of User permissions, data management access, and feature access
 - v. Configuration of below solution areas based on Customer input:
 1. One (1) Implementation Benefit Team
 2. Agency Departments
 3. Account Roles
 4. Pay Modes
 5. Bill Modes
 6. Plan Types
 7. Plan Benefit Items
 8. Plan Statuses
 9. Training Plans
 10. Training Benefit Items
 11. Account Activity Types
 12. Carrier Activity Types
 13. File/Attachment folder structure for the current and upcoming calendar years
 14. Revenue Sources
 - vi. Assignment of one (1) IP address and the associated “Send on Behalf” utility
 - vii. Logo setup
 - b. **Data Services**
 - i. Zywave processes a one-time upload of Customer accounts, account contacts, carriers, plans, expected commissions, commission splits, and activities
 1. Customer provides starting dataset to Zywave from existing Agency Management System (AMS)
 - ii. Data review of up to 500 Customer accounts and contacts mentioned in II.b.i. prior to completion of data upload
 - c. **Training**
 - i. Live group training sessions for Customer end users and producer users
 - ii. One (1) live group end user training session
 - iii. Unlimited access to Zywave’s Support Library providing:

1. Smart support resources and best practice documentation
2. Quick case submission
3. Workflow documentation for end users
4. Community forum to ask and answer questions
- iv. Live group training and on-demand training available via Zywave University
- d. **Consulting**
 - i. One-on-one data collection strategy
 1. Data discovery consultation with Customer and Zywave Data Analyst to offer guidance on data extracts Customer will provide to Zywave for formatting into upload template
 2. Review of formatted Customer data once Zywave Data Analyst compiles Customer data into import template
 3. Data review consultation to ensure work completed by Zywave Data Analyst is accurate ahead of data upload
 - ii. One-on-one Post Training Consultation Calls
 1. Customer discovery to learn more about goals and expectations
 - a. Consulting strategies covering specific plan management workflows and system best practices
 2. Execute initial adoption and rollout strategy
 - a. Creation of custom renewal workflow strategy for Customer's end users
 - b. Implement change management techniques for Customer's sales and service users, incorporating custom activity types created during Initial Setup, for overall agency usage
 3. Ongoing system maintenance preparation for key administrative items:
 - a. Complex reporting access for administrative and end users
 - b. Commission access for administrative and end users

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 data maintenance on behalf of Customer
 - iv. Setup or configuration of third-party integrations on behalf of Customer
 - v. Creation of custom reports on behalf of Customer
- 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. Configuration of additional system workflows on behalf of Customer
2. Creation of carrier commission imports on behalf of Customer
3. Updates to commission access for administrators and end users

- 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.