

Exhibit A – Professional Services Description

Professional Services – Partner Platform

Overview. This service agreement includes services for the Customer's initial implementation of Partner Platform. 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.** 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 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. Logo setup
 - vi. Setup of bridging Partner Platform to one (1) available rater
 - vii. Configuration of below solution areas based on Customer input:
 1. User and employee permissions
 2. Entity creation
 3. Branch creation
 4. Initial activation of carrier downloads settings, if applicable
 - a. Configuration of one (1) third-party downloads utility, if needed
 5. Initial activation of the Downloads Transfer Utility, if applicable
 6. Initial activation of the Downloads Transformation Station, if applicable
 7. Initial creation of logo, e-signatures, and customer templates
 8. Reporting permissions
 9. Email server settings
 10. Proposal creating settings
 11. Text message settings
 12. Initial activation of the Producer Results Manager, if applicable
 13. eDocs and messages
 14. Initial Accounting settings, if applicable
 - b. **Data Services**
 - i. Zywave completes a one-time data import from prior management system using one (1) of the below options:
 1. One (1) data transfer via database backup from Agency Management System (AMS) vendor
 2. One (1) CSV file upload
 - ii. Converted data fields are dependent on the previous AMS vendor
 - c. **Training**

- i. Live group training sessions covering daily agency management tasks related to creation of accounts and policies, service and sales activities, initial administrative functionality, and accounting reconciliation workflows
- ii. One (1) virtual end user training session
- iii. Live group training and on-demand training available via Zywave University

d. Consulting

- i. Post Conversion Data Review
 - 1. Verify Customer data has been properly converted into test environment
 - 2. Ensure Data Services Team completes conversion into live customer environment once key data values have been reviewed with Customer
- ii. One-on-one Post Training Consultation Calls
 - 1. Customer discovery to learn more about goals and expectations
 - a. Conduct end-to-end agency management review process ahead of initial adoption
 - b. Design custom policy management, prospecting, and renewal workflows
 - i. Leveraging agency system setup activities
 - 2. Execute initial adoption and rollout strategy
 - a. Introduce new carrier downloads workflow to Customer
 - b. Assist with agency change management to introduce new client service and sales tasks within new management system
 - 3. Accounting and commissions strategy
 - a. Execution of daily accounting transaction workflow strategy
 - b. Reporting recommendations to track agency accounting activities
 - c. Application of accounting month end entries to balance accounts
 - 4. Ongoing system maintenance preparation for key administrative items:
 - a. Distinguishing user roles for ongoing user creation and access updates
 - b. Identifying ongoing reporting access

e. Post Go-Live Services

- i. Post implementation support after Customer is live on Partner Platform
 - 1. Up to one (1) call per week for up to thirty (30) days post go-live

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 larger than 400 GB
- ii. Data import for fields not specified in data template
- iii. Data revisions sixty (60) days after confirmed import date
- iv. Database backups
 - 1. Raw files accessible for thirty (30) days from initial delivery to customer

c. Training

- i. Additional on-site training at Customer or Zywave physical locations

- ii. One-on-one custom group training sessions, covering items mentioned in c.i.

d. **Consulting**

- i. On-site consulting at Customer or Zywave physical locations
- ii. Additional consulting sessions
- iii. Ongoing system maintenance tasks including
 - 1. Updates to user access for administrators and end users
 - 2. Configuration of additional system workflows on behalf of Customer
 - 3. Creation of custom reports
 - 4. Ongoing report maintenance on behalf of Customer
 - 5. Processing carrier downloads on behalf of Customer
 - 6. Importing files or attachments on behalf of Customer
 - 7. Creating Certificates or other system documents on behalf of Customer

e. **Post Go-Live Services**

- i. Additional or ongoing post implementation support after thirty (30) days post go-live period ends

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.