

Exhibit A – Professional Services Description

Professional Services – Sales Cloud – Performance– Employee Benefits – Premium

Overview. This service agreement includes services for the Customer's initial implementation of Sales Cloud Performance. 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. Assignment of one (1) IP address and the associated “Send on Behalf” utility
 - vi. Logo setup
 - vii. Configuration of below solution areas based on Customer input:
 1. One (1) Implementation Benefit Team
 2. Up to three (3) additional Benefit Teams
 3. Agency Departments
 4. Account Roles
 5. Pay Modes
 6. Bill Modes
 7. Plan Types
 8. Plan Benefit Items
 9. Plan Statuses
 10. Training Plans
 11. Training Benefit Items
 12. Up to five (5) additional custom default plans, with benefit items, for purpose of copying during plan creation and renewals
 13. Account Activity Types
 14. Carrier Activity Types
 15. Up to ten (10) additional custom activity types
 16. File/Attachment folder structure for the current and upcoming calendar years
 17. Revenue Sources
 18. Up to ten (10) carrier commission schedules across all configured carriers
 - b. **Data Services**
 - i. Zywave completes a one-time data pull from Customer’s existing Agency Management System (AMS)
 - ii. Zywave processes a one-time upload of Customer accounts, account contacts, carriers, plans, expected commissions, commission splits, and activities

1. Includes unlimited number plans and accounts for group quoting
2. Includes import of applicable custom fields tied to data categories mentioned in II.b.i.
- iii. Unlimited data review of data mentioned in II.b.ii. prior to completion of data upload
- iv. Creation of up to three (3) total custom reports or copies of existing reporting templates on behalf of Customer
- v. Zywave completes setup or configuration of one (1) available third-party integration on behalf of Customer
- vi. Zywave processes a one-time miEdge data import into Account Management for immediate prospecting use
- vii. Zywave creates five (5) initial Dynamic/Static Distribution Lists for email marketing

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 prospecting, quoting, plan management, and email marketing automation
- iii. One (1) One-On-One Solutions Overview session, reviewing core workflows
- iv. One (1) end user training session
- v. 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
- vi. 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 perform included one-time data pull from Customer's existing Agency Management System (AMS)
 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. Conduct end-to-end agency management review process ahead of initial adoption
 - b. Design custom plan management, prospecting, and renewal workflows
 - c. Conduct end-to-end quoting review process ahead of presenting proposals to prospective clients
 - i. Utilizing client data to provide quoting examples
 - ii. Custom plan management and creation to supplement existing carrier plans already populated within system
 - iii. Proposal best practices regarding output options and utilizing contribution modeling
 - d. Lead generation techniques including prospect search recommendations and utilizing search data within other Zywave solutions, 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
3. Quoting Strategy
 - a. One-on-one review of quoting resource templates and usage within Zywave CPQ
 - b. Zywave creates one (1) sample proposal template within Zywave CPQ on behalf of Customer
 - c. Zywave created one (1) sample Enrollment Benefit Booklet within Zywave CPQ on behalf of Customer that includes all standard plan type pages and up to five (5) Customer sections.
 - d. Initial configuration of Customer TIN, NPN, and Carrier suppression details within Zywave CPQ on behalf of Customer
4. 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
 - c. One-on-one commission tracking overview to distinguish differences between carrier reconciliation and tracking expected commission amounts
 - d. Custom reporting consultations to enhance reports Zywave Data Analyst created mentioned in II.b.iv
5. Ongoing AMS maintenance preparation for key administrative items:
 - a. Incorporating the Microsoft Outlook Add-In for lead and account management
 - b. Complex reporting access for administrative and end users
 - c. 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 additional third-party integrations on behalf of Customer
 - v. Ongoing maintenance for third-party integration
 - vi. Creation of additional custom reports
 - vii. Ongoing report maintenance 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. Creation of additional Distribution Lists
 - 2. Creation of additional email marketing templates
 - 3. Creation of additional Proposals, or updates to sample Proposal created in section II.d.3.
 - 4. Creation of additional Enrollment Benefit Booklets, or updates to sample Enrollment Benefit Booklets created in section II.d.3.
 - 5. Updates to Customer TIN, NPN, and Carrier suppression information on behalf of Customer
 - 6. Configuration of additional system workflows on behalf of Customer
 - 7. Creation of carrier commission imports on behalf of Customer
 - 8. Updates to the Microsoft Outlook Add-In on behalf of Customer
 - 9. 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.