

Exhibit A – Professional Services Description

Professional Services – Sales Cloud Performance - EB

- I. **Overview.** This service agreement includes services for the Customer's Launch Success and, if applicable and purchased, Continued Success of Sales Cloud Performance - EB, dependent upon the inclusion of Professional Services – One Time Implementation or Professional Services – Recurring Services within Customer's Product Schedule. Additional components, not listed here, require additional services.
- II. **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.
- III. **Launch Success.** Applicable for Professional Services – One Time Implementation and Professional Services – Recurring Services, if purchased within corresponding Product Schedule.
 - a. **Estimated Duration.** 12-16 weeks from Initial Effective Date dependent upon Customer engagement.
 - b. **Inclusions.** The following services will be provided as part of this agreement.
 - i. **Initial Setup**
 1. Product activation and system configuration
 2. Creation of initial administrative User(s) on behalf of Customer
 3. Creation of all initial end Users on behalf of Customer
 4. Application of User permissions, data management access, and feature access
 5. Assignment of one (1) IP address and the associated "Send on Behalf" utility
 6. Logo setup
 7. Configuration of below solution areas based on Customer input:
 - a. Creation of Benefit Team(s)
 - b. Agency Departments
 - c. Account Roles
 - d. Pay Modes
 - e. Bill Modes
 - f. Plan Types
 - g. Plan Benefit Items
 - h. Plan Statuses
 - i. Training Plans
 - j. Training Benefit Items
 - k. Additional custom default plans, with benefit items, for purpose of copying during plan creation and renewals
 - l. Account Activity Types
 - m. Carrier Activity Types
 - n. Additional custom activity types
 - o. File/Attachment folder structure for the current and upcoming calendar years
 - p. Revenue Sources
 - q. Carrier commission schedules across all configured carriers (if applicable)

ii. Data Services

1. One-on-one data discovery consultation with Customer, Data Analyst, and Implementation Consultant to perform a one-time data pull from Customer's legacy Account Management System (if applicable)
2. Zywave processes initial upload of Customer accounts, account contacts, carriers, plans, expected commissions, commission splits, and activities
 - a. Includes unlimited number of plans and accounts for group quoting
 - b. Includes import of applicable custom fields tied to data categories mentioned in III.b.
3. Zywave processes initial miEdge data import into Account Management for immediate prospecting use
4. Data review of above-mentioned data prior to the completion of data upload
5. A Data Analyst will consult with the Customer regarding custom reporting needs and design ReportCenter reports to support the Customer's needs
6. Zywave completes setup or configuration of available third-party integration(s) on behalf of Customer
7. Zywave creates initial Dynamic/Static Distribution Lists for automated email marketing

iii. Training

1. One-on-one Solutions Overview training, reviewing core workflows
2. One-On-One training plan discussion with a Subject Matter Expert to deliver a training plan based on Customer's needs
3. Executed one-on-one training sessions covering prospecting, quoting, plan management, and email marketing automation
4. Live group end user training session or producer training session
5. Unlimited access to Zywave's Support Library providing:
 - a. Smart support resources and best practice documentation
 - b. Quick case submission
 - c. Workflow documentation for end users
 - d. Community forum to ask and answer questions
6. Live group training and on-demand training available via Zywave University

iv. Consulting

1. One-on-one data collection strategy
 - a. One-on-one data discovery consultation with Customer, Implementation Consultant, and Data Analyst to perform a one-time data pull from Customer's legacy Account Management System (if applicable)
 - b. Review of formatted Customer data once Zywave Data Analyst compiles Customer data into import template
 - c. Data review consultation to ensure work completed by Zywave Data Analyst is accurate ahead of data upload
2. One-on-One Post Training Consultation Calls
 - a. Customer discovery to learn more about goals and expectations
 - i. Conduct end-to-end agency management review process ahead of initial adoption
 - ii. Design custom plan management, prospecting, and renewal workflows

- iii. Conduct end-to-end quoting review process ahead of presenting proposals to prospective clients
 - 1. Utilizing client data to provide quoting examples
 - 2. Custom plan management and creation to supplement existing carrier plans already populated within system
 - 3. Proposal best practices regarding output options and utilizing contribution modeling
- iv. Lead generation techniques including prospect search recommendations and utilizing search data within other Zywave solutions, based on industry focus
- b. Automated Marketing Strategy
 - i. Utilizes the Distribution Lists created during setup to be used as contact recipients in email marketing
 - ii. Zywave creates initial custom email marketing templates
 - 1. Template content to encourage engagement and ways to increase email open rates
- c. Quoting Strategy
 - i. One-on-one review of quoting resource templates and usage within Zywave CPQ
 - ii. Zywave creates initial sample proposal template within Zywave CPQ on behalf of Customer
 - iii. Zywave creates initial sample Enrollment Benefit Booklet within Zywave CPQ on behalf of Customer that includes all standard plan type pages and initial Customer sections.
 - iv. Initial configuration of Customer TIN, NPN, and Carrier suppression details within Zywave CPQ on behalf of Customer
- d. Execute initial adoption and rollout strategy
 - i. Creation of custom renewal workflow strategy for Customer's end users
 - ii. Implement change management techniques for Customer's sales and service users, incorporating custom activity types created during Initial Setup, for overall agency usage
 - iii. One-on-one commission tracking overview to distinguish differences between carrier reconciliation and tracking expected commission amounts
 - iv. Custom reporting consultations to enhance reports Zywave Data Analyst created mentioned in III.b.ii.5. (if applicable)
- e. Ongoing AMS maintenance preparation for key administrative items:
 - i. Incorporating the Microsoft Outlook Add-In for lead and account management
 - ii. Complex reporting access for administrative and end users
 - iii. Commission access for administrative and end users

- b. **Exclusions.** The following activities are not included in this agreement and, if applicable, require an additional service agreement and subsequent cost estimate.
- i. **Setup**
 - 1. Additional setup beyond noted inclusions in section III.b.
 - ii. **Data Services**
 - 1. Additional data imports or data imports
 - 2. Data import for fields not specified in data template
 - 3. Ongoing data maintenance on behalf of Customer
 - 4. Setup or configuration of additional third-party integrations on behalf of Customer
 - 5. Ongoing maintenance for third-party integration
 - 6. Creation of additional custom reports
 - 7. Ongoing report maintenance on behalf of Customer
 - iii. **Training**
 - 1. On-site training at Customer or Zywave physical locations
 - 2. Additional one-on-one training sessions
 - iv. **Consulting**
 - 1. On-site consulting at Customer or Zywave physical locations
 - 2. Additional consulting sessions
 - 3. Ongoing system maintenance tasks including
 - a. Configuration of additional system workflows on behalf of Customer
 - b. Creation of carrier commission imports on behalf of Customer
 - c. Updates to the Microsoft Outlook Add-In on behalf of Customer
 - d. Updates to commission access for administrators and end users
- c. **Expiration.** All One Time Implementation Professional Services are subject to the Zywave Cancellation Policy available at <https://www.zywave.com/training-cancellation-policy>. Any unused One Time Implementation 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.
- d. **Billing.** The One Time Implementation 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.

IV. **Continued Success.** Applicable only if Professional Services – Recurring Services purchased within corresponding Product Schedule.

- a. **Duration.** Ongoing for the duration of the Term based on Customer's responsiveness and availability.
- b. **Inclusions.** The following may be provided as part of this agreement, depending upon Customer engagement.
 - i. All service requests are reviewed for feasibility and scope alignment. Zywave reserves the right, in its sole discretion, to decline or re-scope requests that fall outside the capabilities of this service package. Requests determined to be outside the defined scope, technically infeasible, or requiring additional development, legal

approval, or non-standard effort will not be performed without a mutually executed Statement of Work or applicable change order.

- c. **Exclusions.** For avoidance of doubt, the following are not included in this agreement and, if applicable, require an additional service agreement and subsequent cost estimate.
- i. On-site training, consulting, or other service work at Customer or Zywave physical locations
 - ii. Services provided in existing Zywave Service Offerings
 - iii. Custom reporting, data extracts, and data back-ups
 - iv. Industry specific trainings nor trainings unrelated to Hosted Application
 - v. Entering Carrier credentials for binding/quoting
 - vi. Data and/or account moves or merges, which included but is not limited to:
 1. Technical moves or merges as a result of a merger or acquisition
 2. Agency Data Merge
 3. Transitioning Hosted Application access between accounts and/or BIDs
 - vii. Custom work, which includes but is not limited to:
 1. Custom integrations not already supported by the platform
 2. Custom development, that includes API development, scripting, or middleware setup
 3. Creation of custom content on behalf of the Customer nor custom e-learning materials
 - viii. Services do not include enabling Customer's clients to submit service requests directly, as all such requests must be initiated solely by the Customer.
 - ix. Zywave will not act as the Customer's system administrator or provide staff-augmentation services to support the Customer's day-to-day operational tasks.