

Statement of Work (SOW) - Momentum Elite Pro Cohort One-Time Services

Project Summary

Provider will work with Customer to complete the following as a part of this project:

- Momentum Elite Pro Cohort Onboarding

*Cohort Onboarding means that Customer will be part of a group of customers attending sessions and training in groups. One-on-one sessions are not included.

Assumptions

Elite Pro Cohort Onboarding

Customer has subscribed to Momentum Elite Pro. Provider's approach to onboarding is a shared effort with Customer. The Customer's team will be expected to configure elements of the Services, perform data entry work, and test workflows throughout the onboarding. This work coincides with training from the Provider's team.

Over the course of the 6-week Cohort Onboarding, ("**Onboarding**"), the Customer should expect to spend approximately **10-20** hours for the best results.

Elite Cohort Training

The training portion of this project will include asynchronous learning. Customer is required to complete weekly on-demand courses in the Provider's Learning Center.

Learning Center courses must be completed prior to cohort working sessions.

Each week of onboarding, Provider will facilitate two (2) 60-minute remote working sessions with the cohort at the regularly scheduled meeting time. The Customer is responsible for ensuring at least one (1) user is in attendance for each weekly session.

Limitations

Elite Pro Cohort Onboarding

The Services will be configured with the features and capabilities of the current release of the Services.

Customers must attend their regularly scheduled session.

Scope of Services

Kick Off

Provider responsibility

- Internal handover and preparation.
- One (1) 60-minute remote cohort kick off meeting.

Customer responsibility

- Ensure project scope is accurate and fully aligns to all business requirements.
- Raise any risks, blackout periods for software release, resourcing plan.
- Ensure key project resources and stakeholders can attend kick off meeting.
- Prior to project kick off, the Customer is responsible for providing the following:
 - Approved document templates (Proposal, Contract, Event Orders, Invoices, etc.) in Microsoft Word format
 - Rate sheets for rental, venue services, equipment use, and food and beverage
 - Customer's project team
 - Onboarding survey
- Provide an understanding of business processes, data, and requirements.

Design

Provider responsibility

- Review Customer configuration after Customer Project Lead completes System Admin Configuration Wizard.
- Facilitate one (1) cohort working session on System Admin configuration.

Customer responsibility

- Customer Project Lead to complete System Admin Configuration Wizard prior to the cohort working session.
- Ensure key project resources are selected and attend cohort working session.

Build

Provider responsibility

- Configuration of [standard base templates](#) such as hold confirmations, proposals, addenda, estimates, event orders, post-event reports, invoices, receipts, & credit memos.
- Minor adjustments to the [standard base templates](#) such as adding logos, modifying fonts, font sizes, and color. Budget intensive customizations are out of scope.
- Configuration of up to three (3) document templates.

Customer responsibility

- Review completed document templates with project team and any internal stakeholders in a timely manner.
- Provide feedback to Provider for adjustments.

Training

Provider responsibility

- Facilitate two (2) weekly sixty (60)-minute remote cohort working sessions on designated weekly topics.

Customer responsibility

- All users will be expected to complete the designed onboarding curriculum in the Provider's Learning Center prior to weekly working sessions.
- Ensure appropriate users are selected and attend all cohort working sessions.

Launch & Post Launch

Provider responsibility

- Internal handover
- Project Closure

Customer responsibility

- Complete a full account review and audit (users and roles, calendar and list views, report and dashboard sharing).
- Promptly raise any issues found (that are within the scope of work)
- Complete customer satisfaction survey.

Project Management

Provider responsibility

- Coordination of resources, activities, and scheduled meetings in alignment with timelines and milestones

Customer responsibility

- Nominated project lead.
- Coordination of activity and resources on customer side to align to project plan and schedule.

Exclusions

- One-on-one consulting time
- Additional custom document templates, outside of what is included above in scope
- Custom development, including reports and dashboards
- Integration services

Project Schedule

The timeline for this project is 6 weeks.

Within two (2) weeks from Project Start Date, Customer must have completed the below tasks, or the Provider reserves the right to move the Customer to a future Cohort Onboarding month and time slot.

- Attend Kick Off meeting
- Provide Provider a list of users
- Provide Provider approved document templates
- Provide Provider rate sheets for rental, venue services, equipment use, and food and beverage
- Complete the onboarding survey
- Review the self-guided recordings on the System Admin Configuration Wizard
- Complete Systemin Admin Configuration Wizard
- Attend remote training session on System Admin configuration
- Complete Learning Center Courses
- Attend weekly all scheduled cohort working sessions