

Account and Contact Import	
<b>Description</b>	Provider will import Accounts and Contacts from the Account/Contact Import Template delivered to the Customer.
<b>Assumptions</b>	Customer will provide clean export from existing CRM in the template shared by the Provider This is not a data migration Integrations are not included
<b>Kick Off</b>	<p><b>Provider responsibility:</b> Internal handover and preparation A 30 minute remote kick off meeting with preparation</p> <p><b>Customer responsibility:</b> Ensure key project resources and stakeholders attend kick off meeting Ensure project scope is accurate and fully aligns to all business requirements Raise any risks, blackout periods for software release, resourcing plan</p>
<b>Build</b>	<p><b>Provider responsibility:</b> Standard Account and Contact Import provided in the Account/Contact Import Template done in the Test environment Standard Account and Contact Import provided in the Account/Contact Import Template done in the Prod environment</p>
<b>Training</b>	<p><b>Provider responsibility:</b> Up to two 60 minute remote training sessions, which will be recorded</p> <p><b>Customer responsibility:</b> Ensure appropriate users are selected and attend all training sessions All users will be expected to complete the designed curriculum in the Provider's Learning Center</p>
<b>Testing</b>	<p><b>Provider responsibility:</b> A 30 minute remote meetings to review and resolve any issues, with follow up Provider will maintain an issue log to track status and progress of issues raised.</p> <p><b>Customer responsibility:</b> Customer will review Test import for validation before import is done in Production environment Customer will review Prod import for validation Ensure key resources attend all testing meetings The testing phase will be no more than 2 days in duration</p>
<b>Launch &amp; Post Launch</b>	<p><b>Provider responsibility:</b> A 30 minute remote post launch support review meeting Project Closure</p> <p><b>Customer responsibility:</b> Ensure key resources attend all post launch support review meetings Raise any issues found (that are within the scope of the SOW) via the issue log template Complete customer satisfaction survey</p>
<b>Project Management</b>	<p><b>Provider responsibility:</b> Coordination of resources, activities, meetings in alignment with timelines and milestones Ownership of issues log and delegation of tasks</p> <p><b>Customer responsibility:</b> Nominated project lead Ensure key resources attend all weekly project review meetings to provide updates Coordination of activity and resources on customer side to align to project plan and schedule</p>
<b>Exclusions</b>	Custom development unless specified above Integration services not specifically defined in the scope above
Estimated length of project: 2 weeks  Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.	