

## Statement of Work (SOW) - Web Lead Form One-Time Services

### Project Summary

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

- Web Lead Form Implementation and Onboarding

### Assumptions

#### Web Lead Form

Customer is fully onboarded or currently onboarding in Provider's Enterprise solution. Customer environment already contains configuration to support the collection of Account Leads and, if applicable, Event Opportunities.

Up to one (1) Web Lead Form configuration is included.

Provider will configure Web Lead Form for default language. Customer is responsible for implementation (wording and translation) for additional languages.

Process documentation will be managed by the Customer with specific software processes outlined during training.

### Limitations

#### Web Lead Form

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

## Scope of Services

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### Kick Off

#### **Provider responsibility**

- Internal handover and preparation.

#### **Customer responsibility**

- Ensure project scope is accurate and fully aligns to all business requirements.
- Raise any risks, blackout periods for software release, resourcing plan.

### Discovery

#### **Provider responsibility**

- Up to one (1) 60-minute remote requirements gathering meeting with preparation and write up.

#### **Customer responsibility**

- Ensure key project resources attend discovery sessions.
- Provide an understanding of business processes, data, and requirements.

### Build

#### **Provider responsibility**

- Configure up to one (1) Web Lead Form utilizing a standard basic web theme.
- Configure basic onscreen reporting for incoming Leads from the Web Lead Form.

#### **Customer responsibility**

- Provide master data and documents in specified formats as requested.
- Configure remaining items as guided by Provider following included training.

### Training

#### **Provider responsibility**

- Up to one (1) 30-minute remote Application Administration Training to manage the Web Lead Form; session will be recorded.
- Up to one (1) hour of remote Key User Training; session will be recorded.
- Training is scheduled to be completed in no more than one (1) week.

### **Customer responsibility**

- Ensure appropriate users are selected and attend training sessions.
- All users will be expected to complete the designed curriculum in the Provider's Learning Center.

## Testing

### **Provider responsibility**

- Up to one (2) 30-minute remote testing meetings with preparation and follow up.
- Provider will maintain an issue log to track status and progress of issues raised.

### **Customer responsibility**

- Customer is responsible for preparing for and executing user testing, including creation of test plans, test cases, and test scripts.
- Ensure key resources attend all testing meetings.
- Raise any issues found (that are within scope) via the issue log.
- The testing phase will be no more than three (3) days in duration.

## Launch & Post Launch

### **Provider responsibility**

- Internal handover
- Project closure
- Post Launch activities will be completed in no more than one (1) week.

### **Customer responsibility**

- Raise any issues found (that are within scope) via the issue log.
- Complete customer satisfaction survey.
- Post Launch activities will be completed in no more than one (1) week.

## Project Management

### **Provider responsibility**

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

### **Customer responsibility**

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

## Exclusions

- Accounts, Contacts, Leads, and/or Event Opportunities onboarding
- Data Import
- Data Migration
- Custom development, including crystal reports, EZWriter, and custom APIs.
- Google Analytics configuration
- Integration services, including amending existing custom integrations (CRM, POS, Finance, etc.)
- Complete site web skins and web themes with advanced features (e.g. HTML, CSS, etc.)
- Web Lead Form supports multi-lingual capability, however implementation of multi-lingual setup is the customer responsibility (wording & translation).

## Project Schedule

The estimated timeline for this project is 4 weeks. However, Provider and Customer will create and agree to a joint project plan in writing (email acceptable). The plan is *an estimate* and subject to change upon mutual written agreement.