Statement of Work

Salesloft Advanced Onboard Upgrade - 1 User Group

Summary

Salesloft, Inc. (“We” or “Salesloft”) is pleased to propose this Statement of Work (“SOW”) to Customer (“You” or “Customer”). This Statement of Work sets forth the scope of Professional Services to be provided by Salesloft to Customer, identified in the Order Form (and subject to payment of fees as set forth in the Order Form), in connection with Customer's access and usage of Salesloft's Subscription Services.

We have provided an approach that is designed to achieve Customer’s strategic goals and ensure a smooth organizational transition. Our approach offers innovation and agility while managing costs predictably.

Scope

This is a packaged onboarding with a predefined scope and schedule of interactive workshops. The scope of this Statement of Work is limited to the Professional Services outlined below, and specifically excludes any business requirements not listed below and any perceptions or assumptions based on conversations or product demonstrations that took place during the sales process. The Professional Services outlined below will be performed against one (1) existing instance of Salesloft and can incorporate one (1) instance of an approved CRM, including Salesforce, Microsoft Dynamics 365, or HubSpot CRM (“CRM”). Any additional CRM instances and/or a CRM other than Salesforce, Microsoft Dynamics 365, or HubSpot will require additional Professional Services and a Change Order to amend this SOW.

Phase 1: Plan

The Plan phase includes Project kickoff, alignment, and planning with the core Customer project team.

Project Kickoff

Consists of a 60-minute session to address the following:

- Introduce project teams
- Review project scope and timeline
- Finalize key project stakeholders
- Align strategic initiatives with onboarding timeline and milestones
- Outline project next steps

Workflow Showcase

Consists of two (2), 60-minute sessions to review the following:

- One (1) Best Practices workflow demo and showcase for managers
- One (1) Best Practices workflow demo and showcase for end Users

User Workflow Mapping

Consists of one (1), 60-minute workshop focused on one (1) user role to address the following:

- Review current processes, tools, workflows and KPIs aligned to the end user role
- Understand common pain points and areas of opportunity for the end user role
- Identify "quick wins" for the end user role

Rhythm Solutions Discovery

Consists of one (1), 60-minute workshop to address the following:

- Review Customer's business case for Salesloft and desired business outcomes
- Discuss priority Rhythm Plays
- Determine recommendations for onboarding

Final Project Plan Review

Consists of one (1), 30-minute workshop to address the following:

- Review finalized project plan, project activities, and critical milestones with project team
- Discuss any final changes or edits to project plan

Plan Phase Materials

The following materials will be provided as a result of the sessions within the Plan phase:

- Onboarding Project Plan in shared Project Management tool
- Updated Solution Architecture documentation draft

Phase 2: Configure

The configuration phase will focus on the setup of key components of the Salesloft platform along with integration into your tech stack. By the end of this phase, the Salesloft platform will be live and ready for end Users.

Deals & Conversations Configuration

Consists of one (1), 60-minute workshop to address the following:

- Review configuration items to ensure data properly flows into Salesloft platform
- Align Customer's opportunity management workflows to best practices in Deals

- Review necessary configuration for Conversations and Coaching capabilities, including Scorecards
- Determine the appropriate access and visibility as it relates to Deals and Conversations

Rhythm Play Design & Configuration

Consists of up to two (2), 60-minute working sessions to address the following:

- Guided consulting to design and configure the prioritized Rhythm plays, as defined in the Plan Phase
- Recommendations for enhancements to Customer's tech stack to support desired use cases

User Workflow Configuration

Consists of one (1), 60-minute working session to address the following:

- Guided consulting for the agreed upon workflow as it relates to Deals and Conversations, as defined in Plan Phase
- Recommendations for enhancements to Customer's tech stack to support desired use cases

Manager Analytics Overview

Consists of one (1), 60-minute workshop to address the following:

- Review in-app Analytics
- Discuss best practices in reviewing outcomes/KPIs as defined in the Plan Phase
- Determine on-going expectations and reporting options related to Salesloft Platform

Enablement Review

Consists of one (1), 60-minute workshop for the end User role, to address the following:

- Review use case and “quick wins” for User Role
- Finalize training schedules, session responsibilities and agendas
- Align on manager and end User communication and change management plan

Configuration Phase Services/Materials

The following services and/or materials will be provided as a result of the sessions within the Configuration phase:

- Configured Salesloft application, per project plan
- Updated Solution Architecture Document
- Delivery of checklist for optional data sync testing between Salesloft and CRM (Customer is responsible for completion of optional checklist)
- Enablement Plans (Final enablement plan for some User roles may be completed in Deploy phase at Customer request, if timeline requires)

Phase 3: Deploy

The Deploy phase focuses on enabling all end Users to fully adopt the Salesloft Platform. Deployment may be broken down into the following groups for enablement:

- One (1) unique User role
- One (1) manager training
- One (1) end User training group, in total

Recommended training flow for each unique Training Group may look like the following. Final flow will be defined in Enablement Plan:

- Manager training
- End User Training: Part 1
- End User Training: Part 2 & Q&A

Admin Check-ins

Consists of a weekly, 30-minute check-in with Customer project leaders during Deploy phase to support rollout of platform to Customer's end Users and monitor early adoption.

Manager Training

Consists of one (1), 60-minute session to execute agreed upon manager training agenda. Training sessions may be delivered collaboratively, and Customer may be asked to demo any internal tools or processes during training sessions, particularly if workflows require steps within Customer's CRM.

End-User Training

Consists of up to 2 hours of live training for the Training Group. Trainings may be broken into two (2) or three (3) sessions, as defined in Final Enablement Plan. End User training may include:

- Salesloft Introduction
- Salesloft User Setup for Conversations
- Salesloft application walkthrough, as necessary for User role
  - Deals
  - Conversations
  - Rhythm Workflow
- Salesloft User workflow training, as necessary for User role
  - Managing Deals

    - Managing Conversations
    - Managing Rhythm Workflow
    - Open forum discussion on best practices, workflows and any necessary troubleshooting
- Customer may be asked to demo any internal tools or processes during training sessions, particularly if workflows require steps within Customer's CRM

Analytics Overview, Manager Q&A

Consists of one (1), 60-minute workshop to address the following:

- Review in-app Analytics
- Report on early platform adoption
- Open forum discussion on best practices, workflows and any necessary troubleshooting

Project Close

Following the launch, Salesloft will close out project with one (1), 60-minute workshop that includes the following:

- Provide insight on health of platform and success of implementation
- Review final analytics
- Discuss next steps and the hand-off process to the Salesloft Customer Success Team

Deploy Phase Services/Materials

The following services and/or materials will be provided as a result of the sessions within the Deploy phase:

- Final Enablement Plans (if not all completed in Configuration phase)

- End User Trainings as defined and related recordings if applicable
- Salesloft Onboard Score
- Project Close Presentation and transition to Customer Success

Roles and Responsibilities

While the Project Team will be more fully defined during the Kick-off call, below is a preliminary list of project roles and responsibilities.

Customer Role	Responsibility
Project Lead	The Project Lead is Salesloft's main point of contact at Customer during onboarding. Project Lead is responsible for driving the definition of use cases and business requirements to ensure delivery of scope as outlined in the SOW.
IT/Security Lead	The IT/Security lead will be responsible for ensuring Users have the proper access to connect video conferencing platform(s).
Sales Manager	The Sales Manager will serve as the expert for workflows specific to their team and advocate for adoption of Salesloft with deployment.
Sales Trainer	If applicable, the Sales Training team will be crucial in aligning with the Salesloft team to train and deploy globally as well as create a library for any training resources created during the project. Sales Trainer will be responsible for ongoing training and enablement of future Users after Onboarding is complete.
End Users	End Users will provide insights in discussions related to their current day to day in Planning and may be included in User Acceptance Workshops. End Users will participate in necessary End User trainings and Q&A sessions.

Salesloft Role	Responsibility
Lead Consultant	The Lead Consultant is generally responsible for performance of Professional Services and delivery of materials outlined in the SOW.
Solution Architect	The Solution Architect provides technical advisory and assistance with advanced CRM configuration, Rhythm Plays, and advanced reporting.

Project Assumptions

In addition to any other responsibilities or duties described in this SOW, set forth below is a list of the obligations for which Customer is responsible, conditions on Salesloft's performance, and assumptions upon which Salesloft has relied in agreeing to perform the Professional Services described in this SOW.

- Customer will identify, and make available for the duration of this project, one primary contact to act as Project Lead, as described under Roles and Responsibilities (above).
- Customer Project Lead will brief their project team on Salesloft technology and Customer goals and objectives prior to kick-off call.
- Customer holds primary responsibility for data quality of sufficient standards to achieve Customer goals.
- Customer will provide all data, systems and connectivity necessary for Salesloft to perform its obligations under this Statement of Work.
- Customer is responsible for any configuration, customization or installation of CRM features (including AppExchange packages). Salesloft Professional Services resources will not request or accept administrator permissions in Customer's CRM instance.

- Customer will be responsible for any testing related to CRM integration, in adherence to any internal Customer policies:
    - Any configuration done in Salesloft testing environment must be manually replicated in production environment; and
    - Customer understands that Salesloft testing environment is not included in this SOW and must be contracted as a separate line on Order form.
- Customer is responsible for creation of copy related to any content within Salesloft. Salesloft will not be responsible for writing any content related to cadences or other features like templates, snippets, or meetings.
- Any scope activities related to Salesloft Deals and Forecast features are only applicable if licensed, and only if Customer is using Salesforce as the CRM.
- All Professional Services will be delivered in English, and during US and/or UK time zone standard working hours.
- International dialer provisioning availability is subject to country-specific regulations and documentation provided by the customer; international phone numbers may not be available in all countries.

Customer Cooperation

Customer will cooperate reasonably and in good faith with Salesloft in its performance of Professional Services by, without limitation:

- Allocating sufficient resources and time to perform any tasks reasonably necessary to enable Salesloft to perform its obligations under each SOW.
- Delivering in a timely manner any customer collateral and other obligations required under each SOW
- Sharing requested documentation to support Onboarding, which may include but is not limited:
    - Any technical architecture documentation

    - Any documentation related to processes/workflows for each use case
    - Current enablement materials to be updated related to launch of Salesloft Platform
- Responding in a timely manner to Salesloft's inquiries related to the Professional Services.
- Actively participating in scheduled project meetings, completing accurate and timely information, data and feedback all as reasonably required. Examples include:
    - Sharing of screens when discussing user workflows
    - Owning demo of workflows during Manager and End User Training related to Customer CRM and other non-Salesloft Customer tools.

Timeline

Plan	Configure	Deploy
Weeks 1 - 3	Weeks 4-5	Weeks 6-8
• Project Kickoff • Onboarding Project Plan • Solution Architecture documentation draft	• Configured Salesloft application, per project plan • Solution Architecture Document • Enablement Plans	• Manager Trainings • End User Trainings • Onboarding Project Close • Transition to Customer Success

Timeline outlined above reflects the recommended timeline for each phase of Select Onboarding. Actual timeline for each phase may differ by one (1) - two (2) weeks, and will be determined in Plan phase and documented in final project plan. The maximum duration for Advanced Upgrade Onboard- 1 User Groups SOW is ten (10) weeks.

Projects requiring additional workshops, consulting, materials and/or configuration outside of the scope and timeline detailed in this SOW will require a Change Order.

Professional Services shall begin on a date to be mutually agreed upon in writing (email acceptable) by Salesloft and Customer. If the date initially agreed upon is subsequently rescheduled at Customer's request to a later date within fourteen (14) days of the originally scheduled start date, Salesloft reserves the right to charge a rescheduling fee equal to 10% of the estimated total Professional Services fee under this SOW.

Location of Work Facilities

With the exception of any onsite service additions explicitly specified herein, all the Professional Services under this SOW shall be performed remotely.

Change Requests

The Fees outlined above are for the Professional Services outlined under Scope. Any additional system functions, business processes, source systems, etc. identified during the Project may increase the overall Fees and/or timeline. Any such change must be agreed upon by both parties in a Change Order to this Statement of Work. Additional Fees may also be required in the event that Customer does not complete the Project Assumptions or Customer Cooperation requirements in a timely manner, including where timelines must be modified due to such failure to complete.

Travel Expenses

Salesloft will invoice Customer separately for fees and expenses incurred in performing the Professional Services. Where the parties mutually agree that all or a portion of the Professional Services covered by this SOW will be provided on-site or in-person, Customer shall be responsible for the travel and out-of-pocket expenses (including but not limited to, transportation, lodging, meals, authorized purchases of data and other customary travel expenses) of the Salesloft personnel involved.

Cancellation

No refunds or credits of Professional Services Fees will be issued for cancellations made following the effective date of this SOW, which shall be the same (unless otherwise stated herein) as the effective date of the Order Form attached hereto.