



# Statement of Work

Salesloft Assess: Basic

### 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.

### Scope

This is a packaged service with a predefined scope and schedule of interactive workshops. The scope of this Statement of Work is limited to the deliverables and 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.

### Activities

The purpose of the Basic Assessment is to review the current state of the implementation that is in use by the Client team in order to determine optimal set up for prospect and customer engagement. The following activities will occur as a part of this process:

- Kickoff Meeting (60 mins)
- Assessment of Salesloft platform that includes:
  - Current-state Discovery call (60 mins)
  - CRM & Salesloft guided walkthrough (60 mins)
  - Admin Settings Configuration audit
  - Analytics review
  - Content/Cadence review
- Findings & recommendations meeting (60 mins)

- Consulting session & Project Close (60 mins)

### Kickoff and Project Planning (60 mins)

The kickoff meeting will focus on setting expectations for the project and ensuring alignment with the team members who will be impacted by the outcome of this engagement. The Salesloft team will also conduct discovery to gather information to ensure success in the project. As a part of this meeting, we will:

- Identify key stakeholders
- Assign team members and responsibilities
- Review approach and project scope
- Set timelines and project plan
- Conduct initial current-state discovery

### Salesloft Basic Assessment

The purpose of the assessment is to review the current state of the implementation that is in use by the Client team in order to determine optimal set up for prospect and customer engagement. The following activities will occur as a part of this process:

- Current-state discovery call (60 mins)
- Guided walkthrough of Salesloft and CRM (Salesforce, HubSpot, or Microsoft Dynamics) (60 mins)
- Configuration Audit: Salesloft will review the foundational configuration of Salesloft to ensure that optimal setup is in place to support Client's go-to-market activities. This may include:
  - Current State / Future State Evaluation
    - Current State Pain Points
    - Future State Objectives
  - Salesforce field mapping and configuration

- Email deliverability settings
- Dialer configuration, including call recording / governance rules
- Cadence settings / configuration
- Admin Settings
- Cadence reporting and analytics: Includes in-app analytics and integration with Salesforce reporting capabilities via Insights from Salesloft managed package
- Content review (templates, snippets): Identify individual versus team-based cadences and content, usage patterns, working / not working
- Automations rules review: Review top automation rules, order of execution, and performance
- Deals recommendations (if applicable)\*
- Conversations recommendations (if applicable)\*
- 3rd-party integrations review: Review current state, identify best practices
- General Considerations (other findings while looking through Salesloft)
- Findings & recommendations meeting (60 mins)

Deliverables: Slide deck and presentation of recommendations for improvements, including quick wins and general recommendations

### Consulting Session & Project Close (60 mins)

After recommendations have been provided, Salesloft will facilitate a 60-minute consulting session on a topic of the Client's choosing from the recommendations meeting. Salesloft and Client will collaborate on topic to ensure Consultant can deliver optimal value within the 60-minute session. At the end of the Consulting session, Salesloft and Client Project Leads will review completed project tasks, discuss next steps, and conclude the engagement.

### Timeline

The following timeline represents the durations required to execute each of the activities within scope of the engagement. Upon kickoff of the engagement, a detailed project plan will be created and reviewed with the Client team.

This SOW includes a project duration of up to 4 weeks.

- Week 1
  - Project Kickoff
- Week 2-3
  - Assessment Discovery Sessions
  - System assessment
  - Assessment recommendations
  - Buildout of Project Backlog (only applies if Assessment will be followed by an additional Consulting engagement with the Salesloft Consulting Services team)
- Week 4
  - Consulting Session & Project Close

Professional Services shall end on a date to be mutually agreed upon in writing (email acceptable) by Salesloft and Customer. End date shall fall within the Timeline outlined in this SOW. If the date initially agreed upon is subsequently rescheduled at Customer's request to an earlier or later date outside of 5 business days of the originally scheduled end date, Salesloft reserves the right to charge a rescheduling fee equal to 10% of the estimated total Professional Services fee under this SOW Prior to application of discount.

## 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 ensure stakeholders are available and able to participate in project meetings as required, according to the project plan and timelines.
- Salesloft and Customer will both identify and provide Project Leads to serve as primary point of contact for each party throughout the engagement.
- Project backlog and tasks will be managed through Salesloft project management tool. Client stakeholders will receive invitations to collaborate in tools, as necessary.
- Salesloft team will work during the business hours of 8am - 5pm Central Time. Salesloft will be closed on all major US holidays.
- 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. Salesloft conducts commercially customary background checks on all new employees.
- 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.
- All Professional Services will be delivered in English, and during US and/or UK time zone standard working hours.

## 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.
- 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.

## Location of Work Facilities

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

## Services Start Date

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 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.

## Change Requests

The Implementation 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 Implementation 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.