Statement of Work

Basic Onboarding

Summary

Salesloft, Inc. ("We" or "Salesloft") is pleased to propose this Statement of Work ("SOW") to Customer ("You" or "Customer"). This SOW 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 the 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 SOW with a predefined scope, including (as further described below) self-service resources and workshops and a dedicated Salesloft consultant. This SOW includes three phases (pre-configuration, configuration, and deploy), with the first two phases (pre-configuration and configuration) being largely customer-driven via our admin onboarding portal. The third phase (deployment) includes access to our end-user onboarding portal and three (3) interactive workshops with your dedicated consultant.

The scope of this SOW is limited to the materials 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. The Professional Services outlined below may be performed against one (1) instance of Salesloft and (if applicable) 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. This SOW does not include any UAT Sandbox testing of any kind.

Admin Onboarding: Overview

Customer's Salesloft administrator ("Admin") must complete the "Overview" section in the Admin onboarding portal before beginning Pre-Configuration. The following is included in the Overview section of the Admin onboarding portal for the Salesloft Admin to review:

- Consultant introduction video
- Project timeline expectations
- Onboard score overview
- Project stakeholder contact information

The Overview section is self-service and considered complete once all the information has been reviewed.

Phase 1: Pre-Configuration

The Pre-Configuration phase is a self-service portion of onboarding that consists of tasks that need to be completed by your Salesloft Admin within the first few days of onboarding. The Pre-Configuration step addresses the following:

Preliminary Information

- Confirm CRM
- Confirm Salesloft tools necessary for your use case
- Outline goals for Salesloft
- Select target go-live date

Pre-Configuration setup items

- Configure Custom Tracking Domain
- Configure TrustHub
- Configure personal settings

The Pre-Configuration phase is complete when all tasks in the sections above have been completed.

Phase 2: Configuration

The Configuration phase is a self-service portion of onboarding that will focus on the setup of key components of the Salesloft platform along with integration into your tech stack. The Configuration phase must be completed by your Salesloft Admin, and includes the following task sections: Administrative Settings, CRM Integration Settings, Data Management best practices, Content Creation & Management, and license specific features (Conversations, Forecast, Deals). Once this phase is completed, the Salesloft platform will be live and ready for end users.

Administrative Settings

The administrative settings section provides instructions for configuring the following:

- Communication Tools: Email, dialer, and meeting settings
- Additional admin settings

CRM Integration

The CRM Integration section provides instructions for configuring the Customer's CRM instance, or using Salesloft without a CRM integration.

- Establishing the connection between Salesloft and CRM
- CRM Sync Settings
- Field Mapping
- Mapping users between Salesloft and CRM

Data Management

The Data Management section provides instructions that address the following:

- Importing records from a CRM
- Importing records from a CSV
- Managing data in Salesloft: Understanding record ownership, people and account management

Content Creation & Management

The Content Creation section provides instructions that address the following:

- Content Creation
    - Content Overview & Definitions
    - Create Templates
    - Create Cadences

- Create Snippets

Configure Conversations, Deals, and Forecast

This section provides instructions for configuring Conversations, Deals, and Forecast (if licensed for use).

- Conversations
  - Conversations overview
  - Configure settings
  - Feature review: Accessing recordings, conversations in-progress, playlists
- Deals
  - Deals overview
  - Configure settings
  - Feature review: Pipeline View, Deal View, Deal Engagement Score, Deal Gaps, Analytics
- Forecast
  - Forecast overview
  - Configure settings
  - Feature review: Customize Forecast Segments, Forecast Rollup, Hierarchy, AI Forecast, and Submitting Forecast

The Configuration phase is complete when all tasks in the sections above have been completed.

Phase 3: Deploy

The Deploy phase focuses on enabling all end users to fully adopt the Salesloft Platform. This includes access to the end-User onboarding portal and three (3) interactive workshops with your dedicated Salesloft consultant. Each workshop has pre-work and post-work that the customer will be required to complete.

Checkpoint 1: Technical Validation

Checkpoint 1: Technical Validation is a 1-hour live session with your dedicated consultant designed to verify all necessary configuration items have been completed, discuss the early adoption plan, and prepare for Checkpoint 2: end-User Training. The Admin is assigned pre-work and post-work for Checkpoint 1.

Checkpoint 1 Outcomes

The following will be delivered during Checkpoint 1: Technical Validation:

- Confirm all required configuration items have been completed and determine next steps for any outstanding items
- Prepare for Checkpoint 2: Early Adoption
    - Discuss deployment strategy
    - Set early adoption KPIs in Coaching within customer instance
    - Begin building Checkpoint 2: Early Adoption training agenda
- Assign customer Admin and end-Users Checkpoint 2: Early Adoption pre-work.

Checkpoint 2: Early Adoption

Checkpoint 2: Early Adoption is a 1-hour live session with your dedicated consultant to train Users on features applicable to their use case and ensure adoption. Admins and end-Users will be assigned pre-work and post-work for Checkpoint 2.

Checkpoint 2 Outcomes

The following will be delivered during Checkpoint 2: Early Adoption:

- Verify all Users have signed into Salesloft & completed self-guided onboarding
- Training on topics agreed upon in Checkpoint 1 prior to live session
- User Q&A

Checkpoint 3: Graduation

Checkpoint 3: Graduation is a 30-minute live session with your dedicated consultant to review the Onboard Score, outstanding onboarding items and introduce Salesloft's customer success team as the long-term point of contact. Admins and end-Users will be assigned pre-work and post-work for Checkpoint 3.

Checkpoint 3 Outcomes

The following will be delivered during Checkpoint 3: Graduation:

- Review Onboard Score: Technical Setup and Early Adoption
    - Communicate successes and areas of improvement.

    - Discuss where additional support may be needed to enhance the Customer's overall experience and long-term success.
- Introduce Salesloft customer success point(s) of contact; review best practices for leveraging customer success team.

Roles and Responsibilities

While the Project Team will be more fully defined after the dedicated onboarding consultant is assigned, below is a preliminary list of project roles and responsibilities.

Customer Role	Responsibility
Project Lead	The Project Lead acts as the main point of contact for the Customer. They are responsible for driving the definition of use cases and business requirements and will ensure delivery of scope as outlined in the SOW.
CRM Admin	The CRM Admin acts as a technology liaison for platform installation, field configuration, dashboard installation, and ongoing support in technical configuration of Customer systems as needed. They help navigate the path to production and determine ownership of ongoing internal support.
IT/Security Lead	The IT/Security lead will be responsible for ensuring the proper configuration of VoIP network for QoS (if licensed for use); setup CNAME for unique tracking link, and enable SSO for the team.
Content Team	The Marketing Team is optional during this engagement. In most cases, Marketing assists with content creation for Cadences and ensuring the flow of inbound leads.
Sales Manager	The Sales Manager will serve as the expert for template and cadence creation as well as signing-off on the Admin configuration.
Salesloft Role	**Responsibility**

Onboarding Consultant	The Professional Services Consultant is generally responsible for performance of Professional Services and delivery of materials outlined in the SOW.

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 before being introduced to the onboarding consultant. Project Lead will coordinate activities with other Customer stakeholders, as the project requires.
- 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 SOW.
- Customer is responsible for any configuration, customization or installation of Salesforce features (including AppExchange packages) if applicable. Salesloft Professional Services resources will not request or accept administrator permissions in Customer's CRM instance.
- 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.
- This implementation does not include any Sandbox Testing in the 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, determining a Project Lead, 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, providing accurate and timely information, data and feedback all as reasonably required.
- Completing the actions items designated in each phase before moving to the next phase of implementation.
- Completing all action items included within the self-service portal.

Location of Work Facilities

All the Professional Services under this SOW shall be performed remotely.

Timeline

Pre-Configuration	Configuration	Deploy
Week 1	Weeks 1-2	Weeks 4-6
• Introduction to dedicated consultant • Access to self-service admin portal • Complete pre-configuration action items	• Configured Salesloft application, per instructions outlined in the self-service portal	• Checkpoint 1: Technical Validation • Checkpoint 2: Deployment • Checkpoint 3: Graduation

The maximum timeline for the Basic Onboarding package is six (6) 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.

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 fourteen (14) days of the originally scheduled start date, Salesloft reserves the right to charge a rescheduling fee equal to 10% of the total Professional Services fee under this SOW.

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 SOW. 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.