Statement of Work

Salesloft Onboard Deluxe

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 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 will be performed against one (1) 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 core Customer project team.

Project Kickoff

Consists of one (1), 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

Planning Workshop

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

- Understand current sales engagement process(es) and related touchpoints
- Identify key workflows, automations and outcomes related business processes
- Determine key milestones and ownership of project plan

Solutions Discovery

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

- Review Customer's business case for Salesloft and desired business outcomes
- Discuss priority focus areas within Salesloft Solutions Framework
- Determine key use case(s) and recommendations for onboarding
- Align on KPIs/outcomes related to use case(s)

User Workflow Mapping

Consists of up to three (3), 60-minute workshops focused on up to four (4) priority user roles to address the following:

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

Technical Discovery

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

- Review technical architecture related to customer's use cases
- Review customer's CRM environment and CRM integration requirements
- Overview of capabilities related to integration and usability with Customer's tech stack and Salesloft
- Determine recommended updates to tech stack outside of Salesloft configuration for optimal Salesloft performance

Enablement Planning

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

- Training and enablement requirements for the three (3) prioritized end user roles
- Review of Salesloft's best-practice manager and end user training processes, and discussion on any customization required for Customer's unique use cases
- High-level rollout plan, timeline, and training milestones
- Determine ownership of key items related to success of enablement plan and Salesloft Solution

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
- 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.

CRM Configuration

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

- Configure key components of the sync between CRM and Salesloft
- Review best practices surrounding automation that aligns to customer use cases
- Discuss governance as it relates to initial setup and on-going maintenance of CRM integration
- Discuss Customer CRM integration testing requirements, if necessary (see assumptions)

Salesloft Platform Configuration

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

- Review and determine appropriate configuration settings related to communication channels utilized with Salesloft.
- Determine the appropriate access and visibility to applicable components in the Salesloft Platform
- Review groups, roles, and available permissions.
- Review necessary configuration for Conversations and Coaching capabilities (if applicable)
- Discuss Salesloft governance plan for ongoing Customer administration

Content Creation and Strategy

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

- Share best practices related to cadences and content within Salesloft
- Align recommended cadence frameworks related to customer strategy and Salesloft Solutions

Solutions Workflow Configuration

Consists of up to four (4), 60-minute working sessions to address the following:

- Guided consulting for up to two (2) Solutions plays aligned with prioritized Salesloft Solutions, as defined in Plan Phase
- Collaboration with customer on Salesloft configuration and automation to enable desired use cases
- Recommendations for enhancements to Customer's tech stack to support desired use cases

Deals Configuration - Admin (if licensed for use, see Project Assumptions)

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
- Discuss use case for Forecast, if applicable

Deals Configuration - Manager (if licensed for use, see Project Assumptions)

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

- Configure recommended opportunity dashboards for manager use case
- Discuss how to utilize deals within manager's workflow
- Determine best path for enablement with manager use case

Admin Q&A

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

- Finalize any open items for completing Configuration phase
- Open forum discussion on best practices, workflows and any necessary troubleshooting
- Review overall health of CRM settings, if applicable

Configuration Wrap Up

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

- Review work completed during and following prior workshops
- Prepare for UAT and Deploy phase

User Acceptance Workshop(s)

Consists of up to two (2) hours during Configuration phase to address the following:

- Validate proper data flow between Salesloft and CRM
- Test and confirm specific workflows built for Solutions with each priority use case
- Ensure communication channels being used with Salesloft are effective for each use case
- Testing may be completed in collaboration either with Customer Admins or with Customer end users. Roles to be included in testing to be determined within project planning

Final Enablement Plan

Consists of up to three (3), 60-minute workshops, one for each of the three (3) end user roles, 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 Materials

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

- Configured Salesloft application, per project plan

- Solution Architecture Document
- 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:

- Up to three (3) unique user roles,
- Up to three (3) manager trainings, one for each user role
- Up to six (6) end user training groups, 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
- End User 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, prioritize any platform enhancements, and monitor early adoption.

Manager Training

Consists of up to three (3), 60-minute sessions to execute agreed upon manager training agenda, one for each unique user role.
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 2.5 hours of live training for each Training Group (up to 6 groups). 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
- Salesloft application walkthrough, as necessary for user role
    - CRM Sync and Data Management
    - Cadences, Templates, and Snippets
    - Deals
    - Conversations
- Salesloft user workflow training, as necessary for user role
    - Importing data
    - Creating cadences
    - Running cadences
    - Managing Deals
    - Managing Conversations
- Salesloft Solutions training

    - End to end workflow to enable prioritized Salesloft Solutions
    - Customer may be asked to demo any internal tools or processes during training sessions, particularly if workflows require steps within Customer's CRM

Team Q&A

Consists of up to six (6), 60-minute sessions to address questions and reinforce behaviors for adopting Salesloft Platform.

- Feedback on early usage and adoption
- Open forum discussion on best practices, workflows and any necessary troubleshooting

Deals Manager Training (if licensed for use, see Project Assumptions)

Consists of one (1), 60-minute sessions 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.

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Admin Analytics Overview

Consists of two (2), 60-minute workshops to address the following:

- Review in-app Analytics
    - Report on early platform adoption

- Discuss best practices in reviewing outcomes/KPIs aligned to Solutions
- Determine on-going expectations and ownership of reporting related to Salesloft Platform

Project Close

Following the successful launch of the Salesloft Platform and configured Solutions, 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 aligned with initial Salesloft Solutions
- Discuss next steps and the hand-off process to the Salesloft Customer Success Team

Deploy Phase Materials

The following 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 for 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.
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. CRM Admin helps 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; setup CNAME for custom tracking link, and enable SSO for the team.
Content Team	The Content team is responsible for creation of team Cadences, Templates, and Snippets. In many cases Marketing assists with content creation and ensures the proper flow of inbound leads.
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.
Associate Consultant	The Associate Consultant supports the Lead Consultant in the delivery of materials outlined in the SOW, with a focus on configuration and enablement activities.
Solution Architect	The Solution Architect provides technical advisory and assistance with advanced CRM configuration, automation rules, 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. 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.
- 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
  - 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 - 4	Weeks 4 - 9	Weeks 10 - 16
• 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 Deluxe 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 Deluxe Onboarding is eighteen (18) 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 specified under Implementation Fees, all the Professional Services under this SOW shall be performed remotely.

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.