



Statement of Work

Drift Upgrade 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 Drift related Subscription Services.

Scope

This is a packaged onboarding with a predefined scope and schedule of interactive workshops. The scope of this SOW 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) instance of Drift and one (1) Drift workspace. Any additional instances or workspaces will require additional Professional Services and a Change Order to amend this SOW.

Milestone	Estimated Timeline	Customer	Drift
Kick-off	Week 1-2	Customer will align core team (Sales, Marketing, Ops, IT), define goals and commit to actions and deadlines outlined on the call. Customer will assign a dedicated Project Manager to own Drift deployment and coordinate with internal stakeholders.	Define high level business goals. Salesloft team will provide an outline of onboarding process and outline next steps/responsibilities.

Project Planning	Weeks 2-10	Customer will regularly review, update and complete project plan tasks in the project management tool provided by Salesloft.	Salesloft team will develop a Customer specific project plan, including milestones, tasks and dependencies. Salesloft team will provide regular updates on project progress.
Playbook Strategy & Build	Weeks 2-6	Customer will deliver an outline of qualifying questions. Customer will provide Salesloft access to view current workflows for replication purposes.	Salesloft team will guide Customer through Conversational Marketing Strategy. Salesloft will guide on building & optimizing playbooks for launch and train the Customer team on best practices.
Sales Strategy	Week 2	Customer will provide an outline of the sales team's structure & strategy, as well as co-create the training material to align with Customer standards. Customer will help in the coordination of the enablement plan & change management process, including stakeholder alignment and leadership mandate(s).	Salesloft team will review Drift functionality, deployment strategy and enablement scope with sales leadership. Salesloft will create an enablement & change management plan in alignment with customer's strategy. Scoping sessions will not exceed one (1) hour-long session.
Integration(s)	Weeks 2-4	Customer will connect CRM/MAP integrations and sync target account lists (if applicable). Customer will designate Sales and	Salesloft team will provide review & expertise on a technical deployment plan based on Customer's technology stack and lead

		Marketing ops contacts to speak to detailed integration needs.	flow processes. Salesloft team will guide Customer through native Drift integration configuration.
End User Leadership Enablement	Week 3-8	Customer managers and enablement will attend Drift training on best practices, reporting and provide feedback on the sales team training content.	Salesloft team will execute one (1) leadership training and tailor the agenda and content based on Customer's specific workflow and use cases.
End User Team Training	Week 3-8	Customer admins and sales team will review our Drift Overview training for Reps on Drift Insider ahead of live training. Both Sales and Marketing admins will attend sales team training.	Salesloft team will attend and co-lead team training to provide best practices and answer questions.
Go-Live Support	Week 8	Customer and Salesloft will support customer's go-live on production website.	Salesloft team will review Customer's portal to confirm go-live readiness and address any questions in partnership with the Salesloft support team.
Post-Launch Reporting Review	Week 10-12	Customer team will attend session(s) to ask questions and provide feedback. Customer team will review Drift reporting.	Salesloft team will review playbooks, results and feedback, suggest optimizations and answer questions. Salesloft team will guide Customer through standard Drift reporting.

*Completion of each phase in accordance with the estimated timeline above is contingent upon Customer's reasonable cooperation with, and provision of data and other information to, Salesloft.

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
Program Owner	For approximately 2-3 hours/week through launch serves as Customer's Primary contact for all project activities, the primary internal contact for questions related to the project, the primary contact to review playbook copy with a Consultant as well as to review settings & lead routing configuration and test playbooks with a Consultant.
Integrations Lead Web Admin	For approximately 1 hour/week through launch, provides assistance to the project team to Install all necessary Javascript, connect MAP, CRM and any native integrations, set up automation triggers and sync settings as appropriate, and ensure alignment with any internal campaigns including participating in building out reporting necessary for campaign effectiveness determination.
Marketing Lead	For approximately 1-2 hours/week through launch, the Marketing Lead will be responsible for helping set playbook strategy & campaign alignment and providing guidance on copy, brand voice and other pertinent materials such as white papers, etc.

Sales/Service Lead	For approximately 1 hour/week through launch, the Sales/Service Lead will be responsible for helping set playbook strategy, specifically when it comes to setting what a qualified prospect vs not qualified prospect is, & for outlining lead routing requirements and signing off on all routing rules.
Sales/Service Managers Sales/Service Users	For approximately 2-4 hours total prior to go-live, these Managers and Users will need to complete 1) Manager enablement (for Managers only): reviewing team reporting and driving change management; 2) Account Set-up (all managers and users), including attending Conversation View training and Q&A sessions
Executive Sponsor	For approximately 2 hours total, the Executive Sponsor will need to be involved in the project to own the definition of KPIs & success metrics. The Executive Sponsor also agrees to provide access to appropriate leadership and stakeholders to the project team for discovery, alignment, and strategy business reviews as necessary and in alignment with the scope of the project.
Salesloft Role	Responsibility
Onboarding Manager	The Onboarding Manager is generally responsible for performance of Professional Services outlined in the SOW.
Consultant	Focused on delivering projects, such as building playbooks and configuring routing rules, and training that help customers understand, adopt, and optimize Drift.
Professional Services Engineer	Responsible for guiding and consulting on Drift technical setup for integrations, workflows and API needs. Available only for Advanced and Enterprise plan customers.

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 Program Owner, as described under Roles and Responsibilities (above).
- Customer Program Owner 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 SOW.
- 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.
- Any scope activities related to Salesloft Deals features are only applicable if licensed, and only if Customer is using Salesforce as the CRM.
- If Customer is adding new users and/or use cases to an existing, previously configured Salesloft platform, session agendas within the configuration phase may be modified to fulfill specific needs of customer for launch.
- 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 this SOW.
- Delivering in a timely manner any customer collateral and other obligations required under this 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.

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.

Timeline

Identify & Integrate	Build & Enable	Deploy & Analyze
Weeks 1-3	Weeks 2-9	Weeks 10-12
Kick-Off Call Playbook Planning & Strategy Call Integration Planning & Strategy Call	Playbook & Routing Configuration Manager & End User Training Sessions	Turn Playbooks On! Initial Results Review & Project Close

Timeline outlined above reflects the recommended timeline for each phase. 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 the SOW is sixteen (16) 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.

Workshops and calls will be conducted according to the indicated timeline. Requests to accelerate timeline or expedite calls will be subject to a change order and applicable fees.

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 Fees associated with this SOW are for the Professional Services outlined under Scope. Any additional system functions, business processes, source systems, Drift instances or workspaces etc. identified as necessary for the completion of the Project or requested may increase the 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.