Sales Cloud Consulting and Account Engagement Implementation Agreement for Presidio Group LLC

Date: Mar 22, 2023

Project Planning

Dedicated Implementation Specialist
- IMG: Assigns an internal project manager within 2-3 business days of payment receipt
- IMG: Sends a kickoff email to client's project manager to initiate project and introduce the IMG project manager

Project Kickoff Call
- IMG: Schedules a 30-minute call to review:
  - Scope of work
  - Collect login credentials
  - Confirm roles of each stakeholder on the call
  - Expectations for deliverables by both parties

Customized Implementation Plan
- IMG: Shares a project plan in Asana with an outline of all project deliverables. The project plan is used to track the status of the project, take notes, log recorded training calls, etc
- Client: Signs off on Asana deliverables in order to begin implementation

Salesforce Consulting Block (10 hours)

This Agreement covers the following specific activities and deliverables:

- "Investments" custom object setup
  - Custom Field Creation
  - Page Layout Updates
  - Reports and Dashboards
- Profiles and Permissions to specify view vs. edit access
- "Meetings" custom object setup
  - Custom Field Creation (including rich text field and Account lookup field)
  - Page Layout Updates
  - Reports & Dashboards
- Creation of new users/profiles/permission sets

This Agreement covers the following general activities and deliverables:

- Project and Technology Consulting
- Best Practice Discussion and Implementation
- Custom Field Creation
- Data Review, Cleanup and Migration
- Lead and Opportunity Pipeline Optimization
- Email/Calendar Integration
- Page Layout and Field Customization
- Validation Rules and Formulas
- Web Integration (web-to-lead/web-to-case)
- Reporting and Dashboards
- Training

Consulting hours include the above general activities and deliverables within the contracted hours selected below. If additional time is required, the client may purchase additional hours at $180 per hour. Hours expire 6 months from initial contract date. Unused hours are non-refundable.

3rd Party Integrations

Salesforce can integrate with thousands of other technology platforms. For a list of available integrations, you can check out the Salesforce App Exchange. While we are happy to make recommendations, Integrated Media Group is not responsible for the functionality or lack of functionality provided by these 3rd party applications. We highly recommend evaluating multiple solutions in order to ensure they achieve the required functionality. These applications may also incur additional monthly fees, which should be discussed directly with the provider.

The scope of this project includes the basic integration and out of the box configuration of the following applications:

DocuSign
Connect DocuSign with Salesforce via native integration: https://appexchange.salesforce.com/listingDetail?listingId=a0N30000001taX4EAI&tab=e

Includes up to 5 hours of configuration, testing, and template setup (estimate based on two templates: NDA and Engagement Letter)

Pitchbook
Connect Pitchbook with Salesforce via native integration: https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IhVeEAK&tab=e

Includes up to 3 hours of configuration and testing.

*Additional work outside the Agreement can be requested and will be billed at a rate of $180/hour.

Account Engagement CRM Integration

Install the Account Engagement Connector Package/Bundle
- IMG: Installs Account Engagement into Client's Salesforce production environment
- Client: Provides Administrator account login or creates new Administrator account with username "sfdc+(client name)@growwithimg.com"

Page Layout Updates
- IMG: Updates specified Lead and Contact layouts with the following components:
  - Engagement History Dashboard
  - Engagement History Lightning Component
  - Account Engagement Lightning Action Buttons
  - Account Engagement Section for marketing fields (score, activity, source campaign, etc)
- IMG: Updates specified Account, Opportunity and Campaign layouts with the following components:
  - Engagement History Dashboard
- Client: Specifies which page layouts require updating. Includes up to 5 page layouts per object.
- Client: Notifies IMG if additional page layouts need to be updated via a change order (additional fees apply)*

Account Engagement CRM Integration

Mapping Users and Single Sign-On

- IMG: Maps Salesforce users into Account Engagement with the appropriate access:
  https://help.salesforce.com/s/articleView?id=sf.pardot_user_roles.htm&type=5
- Client: Specifies which users need access to Account Engagement and which level of access they need. Does not include creation of new Salesforce users.
- Client: Notifies IMG if additional users need to be created in Salesforce via a change order (additional fees apply)*

Mapping CRM Standard and Custom Fields to Account Engagement Fields

- IMG: Maps up to 10 Salesforce custom fields to Account Engagement (used for segmentation and automation)
- Client: Specifies which fields need to be mapped to Account Engagement. Does not include custom field creation or custom object field mapping.
- Client: Notifies IMG if additional custom fields need to be created via a change order (additional fees apply)*

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Account Engagement Technical Setup

Website Tracking Code to Log Visitor Activity
- IMG: Generates (1) web tracking code from Account Engagement Domain Management section
- IMG: Places web tracking code on each website page or coordinates with internal web team for placement
- Client: Provides website login or contact information of website manager
- Client: Notifies IMG if additional websites require tracking codes via a change order (additional fees apply)*

Vanity Tracker Domain (CNAME)
- IMG: Generates (1) custom tracker domain for Account Engagement assets (landing pages, forms, cookied links, etc.)
- IMG: Validates the tracker domain within client DNS or coordinates with internal web team for placement
- Client: Provides DNS login or contact information of website manager
- Notifies IMG if additional tracker domains are needed via a change order (additional fees apply)*

Email Authentication for Email Deliverability Optimization
- IMG: Generates DNS entries for (1) email sending domain to allow successful email sending from Account Engagement IP
- IMG: Validates DNS entries or coordinates with internal web team for placement
- Client: Provides DNS login or contact information of website manager
- Notifies IMG if additional email sending domains are needed via a change order (additional fees apply)*

Lightning Email/Landing Page Builder Setup
- IMG: Configures drag-and-drop Email and Landing Page builders supported by Account Engagement Lightning (includes one Salesforce CMS Workspace/Channel setup)
- IMG: Provides pre-recorded training video on the builders
- Client: Provides which users should have access to the drag-and-drop builders

Lead Scoring, Scoring Categories, and Dynamic Content Review
- IMG: Reviews out-of-the-box lead scoring, scoring categories, and dynamic content
- IMG: Creates one scoring category with corresponding folder and one sample dynamic content with up to 3 text-based variations
- Client: Notifies IMG if custom scoring rules or dynamic content are needed via a change order (additional fees apply)*

B2B Analytics Dashboards
- IMG: Configures the 5 out-of-the-box B2B Analytics reports
- Client: Notifies IMG if custom reports/dashboards are needed via change order (additional fees apply)*

BCC Compliance Setup
- IMG: Adds email address to BCC Compliance field under Account Engagement Settings
- Client: Provides which email address should be added to BCC Compliance

Marketing Asset & Integration Setup

Database Import/Salesforce Data Sync
- IMG: Imports (2) lists of current Salesforce Leads and Contacts to Account Engagement after connector is verified
- Client: Confirms import
- Client: Notifies IMG if additional imports are needed via a change order (additional fees apply)*

Add-Ons & Connectors Setup
- IMG: Shows Client out-of-the-box connectors, including: Webinar Connectors (WebEx, ReadyTalk, GoToWebinar), Event Connectors (Eventbrite), Other Connectors (Slack, Google Analytics, Google Ads, bit.ly, AddThis, Olark), Social Media Connectors (Facebook, Twitter, LinkedIN)
- IMG: Demonstrates how to configure and use connectors
- Client: Notifies IMG If there are external connectors needed (3rd party connectors or middleware such as Zapier) to scope out setup separately via change order (additional fees apply)*

Custom Designed Email Template (3)
- IMG: Builds (3) custom email templates in the drag-and-drop email builder
- Client: Provides email sample or existing template they are looking to replicate
- Client: Notifies IMG if additional email templates need to be created via a change order (additional fees apply)*

Form/Form Handler Setup (1)
- IMG: Connects (1) web form with Account Engagement via form iframe (IMG will design, build, and place the form) or form handler (IMG to build and connect with web form)
- IMG: Reviews and configures up to 10 completion actions
- Client: Provides name and location of web form they would like to connect with Account Engagement. If Client does not have form decisions made by the start of the 30-day support period, they will receive written instructions on the suggested connection.
- Client: Notifies IMG if additional forms need to be created/connected via a change order (additional fees apply)*

Automation Rule Setup (1)
- IMG: Builds (1) automation rule
- Client: Provides example of how they would like to use Account Engagement automation rule. If Client does not have automation rule decisions made by the start of the 30-day support period, they will receive a template with video instructions from quickclips library.
- Client: Notifies IMG if additional automation rules need to be created via a change order (additional fees apply)*

List Segmentation Setup (Up to 5)
- IMG: Creates up to (5) static or dynamic lists in Account Engagement, including list imports and dynamic field criteria. Does not include field creation or separate automation in Salesforce for custom/inaccessible objects.
- Client: Provides spreadsheets or examples of lists they would like to build for email marketing
- Client: Notifies IMG if additional lists need to be created via a change order (additional fees apply)*

Marketing Asset & Integration Setup

Engagement Programs Setup (1)

- IMG: Builds (1) Engagement Program with up to 5 emails (either plain-text or utilizing template built as part of the Agreement)
- IMG: Provides best practices, email template build, yes/no path option walkthrough, launch assistance, and a 30-minute strategy session (if applicable)
- Client: Provides copy for the 5 emails and general ideas of the type of nurture program they would like to set up. If Client does not have an engagement program plan ready by the start of the 30-day support period, Client will receive an engagement program template and a how-to video.
- Client: Notifies IMG if additional engagement programs need to be created or Client needs assistance setting up email signatures, a change order would be submitted for additional time (additional fees apply)*

*Additional work outside the Agreement can be requested and will be billed at a rate of $180/hour.

Training and Support

Training Sessions
- IMG: Provides a 1 hour, recorded, email sending training
- IMG: Provides a 1 hour, recorded automations, asset building, custom field mapping, scoring training
- Client: Will notify IMG if additional training hours are required via a change order (additional fees apply)*

*Project is considered complete when training recordings are sent.

Post training support and customization
- IMG: After the second training, enter a 30-day post-training support period for quick questions/quick calls. Any new project requests over 2 hours will be billed separately.
- Client: Will notify IMG if additional support hours are required via a change order (additional fees apply)*

*Additional work outside the Agreement can be requested and will be billed at a rate of $180/hour.

Name	Price	QTY	Subtotal
Sales Cloud Consulting (10-hour block)	$180.00	10	$1,800.00
DocuSign and Pitchbook Integrations Includes up to 8 hours of configuration and testing	$180.00	8	$1,440.00
Account Engagement Plus Implementation	$4,600.00	1	$4,600.00
Additional Services			
☐ Landing Page Template Creation of landing page template-based landing page using the native Lightning Landing Page builder. Custom CSS/HTML not included.	$250.00	1	$250.00
☐ Email Template Creation of additional email templates using the native Lightning Email builder	$200.00	1	$200.00
☐ Hour of Training Additional hours of training	$180.00	1	$180.00

Name	Price	QTY	Subtotal
☐ Digital Marketing Strategy Sessions Strategy Sessions with our Digital Marketing team to review engagement program, email, and automation ideas ($150/hr)	$150.00	1	$150.00
☐ Design Services Mockups and design work for email templates and landing pages ($150/hr)	$150.00	1	$150.00
☐ Copywriting Services IMG will provide content for one full engagement sequence, up to 5 emails	$450.00	1	$450.00

Total **$7,840.00**

Billing Terms

The above estimates are for software implementation services only and do not include Salesforce Software Licensing. Payment terms are as follows:

- **Payment 1** - 50% of project total due at acceptance of this agreement.
- **Payment 2**- 50% of project total due net 30 days.

Billing Contact

First Name	Susan	Last Name	Stein
Email	accounting@thepresidio.	Phone	(720)
Company Name	The Presidio Group	Billing Street	255 Clayton St., Suite 200
Billing City/State/Zip	Denver	co	80206

Primary Contact/Project Manager

First Name	Lauren	Last Name	Pfohl
Email	lpfohl@thepresidiogroup.com	Phone	(404) 434-1837

Master Professional Services Agreement

Statement of Work. All services to be rendered pursuant to this MPSA shall be set forth on the statement of work attached hereto or otherwise identifying this MPSA (each, a "*Statement of Work*" and collectively with this MPSA, the "*Agreement*"). IMG shall perform the customization and other services as set forth in the applicable Statement of Work (collectively, the "*Services*"). Statements of Work shall include, without limitation, the scope of the Services, testing and acceptance criteria, the schedule for the Services, and the associated fees. A Statement of Work shall not be effective and a part of the Agreement until executed by duly authorized representatives of both Parties, and IMG shall not be obligated to perform any Services until such time.

Change Orders. In the event that Client wishes to request a modification to a Statement of Work, then Client shall provide IMG with written notice detailing the requested changes. IMG shall provide Client with written notice of the impact, if any, that the suggested changes would have on the schedule, fees, or other terms in the applicable Statement of Work.

Project Manager. Each Party shall designate a project manager to represent that Party in the implementation of the Agreement. The project managers shall be responsible for the day-to-day coordination of the activities between the Parties as more fully set forth in a Statement of Work.

Timeline. On average, projects take 4-6 weeks unless otherwise stated in this SOW. The system "go-live" date depends on the timeliness of receipt of payment, receipt of necessary data and requirements, and proper flow of communication. In the

event that there is a prolonged period with a lack of response, IMG reserves the right to temporarily put the project on hold and re-assign to a new project manager.

Assumptions. Pricing in this proposal assumes that data will be provided in the proper, cleaned format. IMG will not be responsible for extracting data from 3rd party systems unless otherwise stated above. Proposal does not include custom development. If 3rd party integrations are included, IMG is not responsible for any lack of functionality or support.

Brodie Cobb

Credit Card Authorization Form

Select your payment method below. If you are paying by credit card, please fill in the required fields below. If you choose to pay by ACH, our accounting department (accounting@growwithimg.com) will contact you with the necessary details. If paying by check, you will be receiving an invoice upon the acceptance of this agreement.

Payment Method   Check

Company Name

Name on Card

Card Number

Expiration Date   /   CVV

Card Holder Billing Address

Street Address

Suite/Unit #

City

State

Zip

Phone Number

Authorized Signature

I authorize the purchase of the services outlined in this statement of work from Integrated Media Group. Using this Credit Card Authorization Form, I agree that I will pay for this purchase and indemnify and hold Integrated Media Group harmless against any liability pursuant to this authorization. I understand that I will automatically be billed and my credit card will be charged based on the terms of this contract. I also understand my signature

on this form will serve as an authorized signature on the credit card charge slip. This authorization is valid as long as services are rendered.

Your Name   Date   /

Signature

Signature Certificate

Signer	Timestamp	Signature
Email: bcobb@thepresidiogroup.com Shared via link		Brodie Cobb

Sent:	29 Mar 2023 12:48:23 UTC	
Viewed:	03 Apr 2023 19:41:42 UTC	
Signed:	03 Apr 2023 20:16:26 UTC	

IP address: 50.214.12.126
Location: Aurora, United States

Document completed by all parties on:
03 Apr 2023 20:16:26 UTC

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