(OLD) Integrated Media Group l Contractor Agreement

Welcome to IMG! We are excited to have you working with our team. During this process, you will have full access to our team for any questions or concerns. Before getting started, we want to outline our expectations of how you will use the tools and adhere to our processes here at IMG.

IMG Processes

Manager Communication

All email communications/calls should have your team lead cc'd. Please make sure when scheduling calls, that you are looking at their calendars to see if they are available.

Team Lead must be included in all client meetings

Salesforce and Pardot (use new name) contractor team lead: Katie Kelley (katie@growwithing.com)

Weekly meetings with IMG leadership are mandatory.

Response Times

You are expected to reply to Slack messages from your team ASAP. Push notifications must be set up so you know when questions/requests are coming in in real-time.

For client emails, you are expected to reply with answers or acknowledgment of the task same-day or within 1 business day. This does not mean deliverables need to be finished within that time, we just need the client to know that we are working on it. Client communication is of utmost importance at IMG.

Logging Time

You will be invited to join our Clockify account. Please log hours within Clockify under the Time Tracker tab (screenshot below). This links to our IMG Salesforce and helps us keep track of how many hours are used for each project. Please also log time in Upwork/Zenefits for payment.

Project task descriptions are required when logging time in Clockify.

*****IMPORTANT, PLEASE READ CAREFULLY*****
Each project type is budgeted for a certain number of hours. Standard hours for implementation projects are below*:

- Sales Cloud Implementation - 20 hours
- Service Cloud Implementation - 16 hours
- Financial Services Cloud Implementation - 25 hours

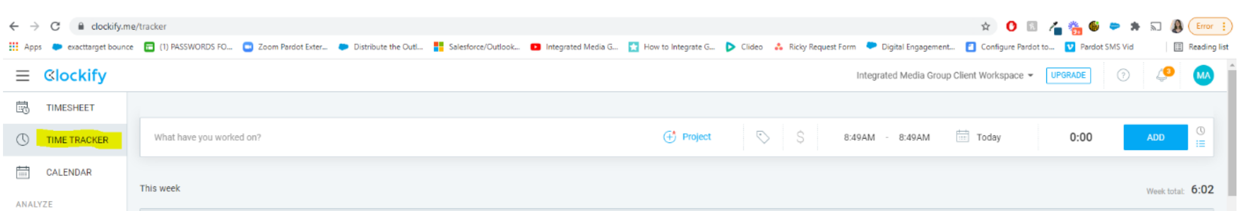
- Pardot Implementation - 12 hours
- Marketing Cloud Implementation - 25 hours

*Based on Quickstart implementation projects, does not include custom scopes/integrations/etc.

The hours allocated on a project can be found listed in your Quip project tracker document. You are also able to track the number of hours you've logged on the project in the same tracker. If you notice that your hours are failing to log, you must let your manager know immediately. If you believe a project is going to exceed the number of hours allocated, then you must let your manager know. A meeting will be scheduled with your manager to review the project details and determine if extra billing is necessary.

Terms and Conditions:

- When you receive the Client Agreement from your team lead, please review it and make note of any line items that may put you over the hours allotted for the project. Alert your team lead immediately.
- Review the scope of work during the kickoff call and ensure that client is aligned with deliverables. After the kickoff call, reconvene with your team lead to ensure that project hours are used efficiently.
    - **Go through SOW line by line**
    - **Identify any areas we need clarity on**
    - **Go over the change order process**
- Send a recap of the discussion after the kickoff call to ensure we have all expectations in writing. **Recap must outline what was covered in the meeting, items needed from the client and IMG's next steps**
- If a client has out-of-scope requests during the project, please explain to the client that the additional work will be billed hourly based on the request type. Alert your team lead immediately so a change order can be submitted. A change order is a separate scope of work that reflects the new deliverables/hours needed to complete the project. No work is done until the change order is sent and paid for.
    - **Change order requests should be made to Team Lead, who will then submit the change order request internally**
    - **Commissions to be paid out to PM for each signed change order**
    - **IMG Contractors Commission Schedule.docx**
- For each project, you will have a Quip document (see next section below) that outlines the low- and high-end of hours for the project. Once you reach the low-end of hours, you must notify your IMG team lead immediately. If you reach the high-end of hours without consulting your team lead and continue to log hours towards the project, **you will not be paid for the additional time**. We understand that special projects have exceptions, but if these hours are exceeded we need clear communication to leadership so we can monitor the amount of time spent per project, and bill clients if additional out-of-scope work is required.
- **Change order process.**



Project Management

You will receive a quip document with your projects and hours estimates that you will be responsible for managing.

Scheduling Meetings

All meetings should be scheduled using your IMG email address. The team uses Google Hangouts, so when you go to schedule a meeting through your IMG calendar, a Google Hangouts meeting link should automatically populate.

You will need to include your team lead on all calls with clients, so you will want to add their calendars to your view. You can do so by navigating to your calendar, clicking the "+" next to "Other Calendars" > "Subscribe to Calendar". In the "Add Calendar" text box, type in the appropriate email address based on your role:

Salesforce and Pardot (Use new name) contractor team lead: Katie Kelley (katie@growwithimg.com)

Here is a quick video on how to subscribe to your team lead's calendar: https://www.loom.com/share/1b5e2bf2a475423ebb9c062fb88c3812

How to Properly Run a Kickoff Call

After the kickoff email is sent out by your team lead, you are expected to follow up with times for a kickoff call. A single implementation kickoff (Pardot or Salesforce only) should take 30 minutes, unless it's complex. A dual implementation (Salesforce and Pardot) should be an hour to make sure all scope line items are addressed.

So how do you properly run a kickoff call?

Before the kickoff:

1. Review the SOW
2. Ask your team lead for any insights on the client
   a. Sometimes clients will have specific setup requests, features in mind for scope line items, etc. It's best to be aware of these before the call.
3. Refer to your SOP document
   a. Salesforce:
   b. Pardot: SOP - Pardot Quickstarts

During the kickoff:

1. Walk through the SOW with the client and let them know what each stage of the process looks like
2. Gather any logins or materials you may need during the kickoff to get the project going
3. Leave the call with clear action items on your side and/or the client side

After the kickoff:

1. Send a recap of the actions items for the client and yourself to make sure deliverables and timelines are clear

Setting up IMG user accounts in client orgs

When we start implementation, usually clients will either:

1. Provide a Salesforce admin login
2. If they have a spare license, they will ask us who they should set up the account for

If they go route #2, we will ask them to set up a user account for "sfdc+(clientname)@growwithimg.com". This feeds into our general SFDC gmail account. Once the user account is created, ask your team lead to complete the Salesforce account setup. The team lead will then log the account login in Keeper.

IMG Tools

IMG Email Address

You should have received an invitation to your personal email address to set up your IMG email. Please set this up as soon as you can! All communications with clients should come from your IMG email address.
calendar: https://www.loom.com/share/1b5e2bf2a475423ebb9c062fb88c3812

IMG Email Signature

To make sure branding is consistent, we ask that you set up an IMG email signature. Please use the template below to fill in your information. For job title, you can put "(Salesforce or Pardot) Administrator". Once you download the file, open it in Chrome and copy the entire contents of the signature. You can then paste that into Gmail and edit.

IMG Gmail Signature v2.html

IMG Salesforce Account

Once you are logged into your new IMG email address, you will notice there will be an email from our internal Salesforce account to finish setting up your user profile. Once you are logged in, you'll notice that the user profile you have will not show much (if any) internal information. We use these profiles to assign out projects and send kickoff emails with the appropriate rep cc'd.

IMG Slack Account

Our team uses Slack for internal communication. Once you have your IMG email address ready, you can log into the growwithimg.slack.com channel. Your team lead will then send you the scope of work for your project(s) via Slack.

You are expected to be on slack during business hours (we are primarily located on the east coast, so business hours are 9-5pm EST). While you are not expected to be online all day, you will be expected to promptly answer any teammates questions. For this reason, we would like you to enable push notifications to your phone/computer so you can see messages as they come in.

Contractors must reply to Slack messages within 1 business day of receipt, unless otherwise agreed upon.

IMG Slack Channels

There are a few shared Slack Channels that our team uses that you will be added to.

For Salesforce:

- salesforce-implementation
    - For the entire Salesforce implementation team to send questions or comments along to the team. Good resource for anyone that needs help with something they're stuck on or for questions on scope creep

For Pardot:

- pardot-implementation
  - For the entire Pardot implementation team to send questions or comments along to the team. Good resource for anyone that needs help with something they're stuck on.

General:

- verification-codes
  - When trying to log in using an sfdc+(clientname)@growwithimg.com username, if there is a verification code needed, this channel will automatically post verification codes so you do not have to log into the sfdc email address.
- all-staff
  - All team members are a part of this channel. Org-wide updates will be posted here.
- salesforce-and-pardot-questions
  - This channel is specific to the two implementation teams — Salesforce and Pardot. Another great place to ask any questions if you get stuck on the CRM or Pardot side (you will notice we do a lot of joint implementations).

Password Management

Our team uses a Chrome extension called Keeper to log into client accounts. Here's how to set up Keeper:

1. Download the extension onto your computer: https://chrome.google.com/webstore/detail/keeper%C2%AE-password-manager/bfogiafebfohielmmehodmfbbebbbpei?hl=en-US
2. When you visit "login.salesforce.com", or other frequently visited sites, you can click on the Keeper icon to see the account login options available to you. Select the client account through the extension and it will autofill the username and password.

All passwords obtained from the client must be provided to your manager. Failure to do so will result in disciplinary action.

Recording Meetings

Our team uses the Loom Chrome extension to record training and one-off how-to videos for clients. Sometimes clients will request that every call be recorded. Here's how to set up Loom for your desktop:

1. Download the extension onto your computer: https://chrome.google.com/webstore/detail/loom-for-chrome/liecbddmkiiihnedobmlmillhodjkdmb?hl=en-US
2. Use the Keeper chrome extension to log into the marketing@growwithimg.com gmail account
3. Once logged in, be sure to test the tool and let your team lead know if there are any issues