



# Sales Cloud and Account Engagement Implementation Agreement for **MIP One Wall Street Acquisition LLC**

Date: Feb 15, 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 45-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
- IMG: Provides a template for the functional specifications of the project
- Client: Signs off on a functional specifications document in order to begin implementation

## Sales Cloud Implementation

### Data model consulting and mapping

The Sales Cloud data model is the organization of objects and their relationships between one another.

- IMG: Provides 1 hour of data model consulting
- Client: Notifies IMG if time is required for data model consulting or mapping via a change order (additional fees apply)\*

### Creation of custom fields on all standard objects

- IMG: Creates up to 20 custom fields on each of the common standard Salesforce objects, including accounts, contacts, leads, opportunities and cases.
- Client: Notifies IMG if additional fields need to be created via a change order (additional fees apply)\*

# Sales Cloud Implementation

## Migrate data to Salesforce from up to five client-provided spreadsheets

- IMG: Completes the one-time data import once all properly formatted data is received
- Client: Provides a maximum of 5 spreadsheets with properly formatted and cleaned data for accounts, contacts, leads, opportunities, and/or cases
  - Data provided must include unique record ID's (identification number, email, etc)
- Client: Provides 5 sample records of each object for IMG to upload to confirm data mappings
- Client: Notifies IMG if additional support is needed for data cleaning or additional imports via a change order (additional fees apply)\*

## Assumptions for Data Migration

Pricing in this proposal assumes that data will be provided in the proper, cleaned format. The data provided must also include unique record IDs. IMG will not be responsible for extracting data from 3rd party systems unless otherwise stated above. Client will need to provide the sample records to IMG at project kickoff to avoid delays in the implementation.

## Setup user accounts, roles and permissions for 10 user licenses

- IMG: Sets up user accounts, roles and permissions for 10 user licenses
- IMG: Creates up to 3 custom profiles and/or permission sets
- Client: Provides the full name, email address, role and permissions of each individual requiring a user account
- Client: Notifies IMG if additional users, profiles, or permission sets need to be created via a change order (additional fees apply)\*

## Provide page layout adjustments and configuration on all standard objects

- IMG: Adjusts each standard object to ensure the proper fields are displayed in the appropriate order and that the related record data is organized in an easy to access manner.
- IMG: Creates up to 3 page layouts per object
- IMG: Creates up to 3 record types per object
- IMG: Creates up to 2 validation rules per object
- Client: Notifies IMG if additional page layouts, record types, or validations rules need to be created via a change order (additional fees apply)\*

## Incorporate company branding, color scheme and configure navigation

- IMG: Adds branding and navigation colors
- IMG: Configures navigation menu.
- Client: Provides a jpg or png of company logo

## Integrate Outlook/Gmail through Salesforce Email App

- IMG: Sets up Outlook/Gmail integration in Sales Cloud
- IMG: Provides a link to the proper add-on application and configuration in Salesforce to allow for Einstein Activity Capture (auto logged emails and calendar events)
- Client: Ensures that each user sets up the integration in their email inboxes
- Salesforce Support Team: Any support needed after installation will be provided by Salesforce Support

# Sales Cloud Implementation

## Setup 5 reporting templates and 1 reporting dashboard

- IMG: Provides an introduction to the report and dashboard options available out of the box from Salesforce
- IMG: Creates a set of 5 custom reports
- IMG: Creates 1 dashboard that visually represents the report data

## One-Step Automation

- IMG: Creates 1 record-triggered flow to automatically create a task, send an email, or update up to 4 fields on one standard object.
- Client: Notifies IMG if additional automations are needed via a change order (additional fees apply)\*

## Design 2 Email Communication Templates

- IMG: Creates 2 plain text email templates for use with bulk list emails or 1:1 email communications from a Salesforce record
- Client: Provides content for email templates
- Client: Notifies IMG if additional email templates, HTML templates, or email signatures need to be created 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.

# Account Engagement Technical Implementation

## Install the Connector Package/Bundle

Included

Installation of Account Engagement. Requires a CRM Admin login. If there are any spare licenses, account name will be "sfdc+(client name)@growwithimg.com"

## Lead and Contact Page Layouts Updated

Included

Two sections are added to the Lead and Contact page layouts in Salesforce. The "Engagement History" Lightning Component displays all of the marketing activities for the individual Lead/Contact. Additionally, an "Account Engagement" section containing fields and buttons are added to each lead and contact/person account page layout with the appropriate fields and buttons. Includes setup of out-of-the-box Engagement History Dashboards.

## Mapping Users and Single Sign-On

Included

Account Engagement has three levels of access: Admin, Marketing, and Sales:  
[https://help.salesforce.com/s/articleView?id=sf.pardot\\_user\\_roles.htm&type=5](https://help.salesforce.com/s/articleView?id=sf.pardot_user_roles.htm&type=5) | Map in any of your Salesforce users to Account Engagement with the appropriate access. Does not include creating Salesforce users.

## Mapping CRM Standard and Custom Fields to Account Engagement Fields

Included

Default fields are automatically mapped to Account Engagement, and we will map in any custom fields you need for segmentation on the standard objects. Does not include field creation or custom object field mapping. Up to 10.

## Website Tracking Code to Log Visitor Activity

Included

The team creates a "Website Tracking" code from Account Engagement. The tracking code is then added to each website page before the </head> tag. This will give us website visitor and known prospect activity data/scoring. Includes one tracking code placement.

## Vanity Tracker Domain (CNAME)

Included

Create/configure custom tracker domain for Account Engagement assets (landing pages, forms, cookie links, etc.). Example "go.(domain).com". Includes one tracker domain setup.

## Email Authentication for Email Deliverability Optimization

Included

Generate and update DNS records for email deliverability optimization.

## Lightning Email/Landing Page Builder Setup

Included

Configuration of the Lightning Builder. Includes setup of custom domain for file hosting through Salesforce CMS and a pre-recorded training video.

## Lead Scoring, Scoring Categories, and Dynamic Content Review

Included

Includes review of out of the box scoring options as well as customization of the available items for scoring, scoring categories, and dynamic content. Does not include custom scoring rules. Includes one sample dynamic content setup with up to 3 text-based variations.

# Account Engagement Technical Implementation

## B2B Analytics Dashboards

Included

Includes setup of the 5 out-of-the-box B2B Analytics reports. Custom reports/dashboards not included but can be purchased at a rate of \$180/hr.

## Marketing Asset & Integration Setup

### Database Import/Salesforce Data Sync

Included

Import existing Leads/Contacts to Account Engagement after the connector is established. Includes import of two lists.

### Add-Ons & Connectors Setup

Included

Setup out-of-the-box connectors, including: Webinar Connectors (WebEx, ReadyTalk, GoToWebinar), Event Connectors (Eventbrite), Other Connectors (Google Analytics, bit.ly, AddThis, Olark), Social Media Connectors (Facebook, Twitter, LinkedIn). Does not include 3rd party connectors or middleware integration (e.g. Zapier).

### Google Ads Connector Setup

Included

IMG to connect one Google Ads account to Account Engagement via native connector. IMG to provide Tracking snippet for Client to add to the Final URL Suffix in Google Ads account (does not include advanced UTM Tracking parameters). IMG to create and map up to 3 campaigns to match up to 3 Google Adwords campaigns.

### Custom Designed Email Template

Included

IMG to build custom email template based on an existing template from client or provided samples. Includes one email template in the standard builder or the Lightning builder.

### Form/Form Handler Setup

Included

Connect web forms with Account Engagement via hosted form (IMG will design, build, and place the form) or Account Engagement form handler (IMG to build and connect with web form). Includes completion actions. 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.

### Automation Rule Setup

Included

Create an automated rule in Account Engagement. 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.

### List Segmentation Setup

Included

Create a dynamic or static list in Account Engagement. Includes up to 5 lists.

## Marketing Asset & Integration Setup

### Engagement Programs Setup

**Included**

The client is expected to provide copy for Up to 5 emails for a drip/nurture series (usually plain-text). IMG to provide best practices, setup, and help with launching. Client provides copy. Does not include email signature setup. 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.

# Training and Support

## Customized training based on Project Plan

### Sales Cloud:

- IMG: Provides a 1 hour, recorded, front end user training prior to going live
- IMG: Provides a 1 hour, recorded administrator and reporting 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.

### Account Engagement:

- 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

### Sales Cloud:

IMG Provides up to 2 hours of admin support for up to 30 days after the completion of the project. Unused support hours expire after 30 days and cannot be carried forward. Client: Will notify IMG if additional support hours are required via a change order (additional fees apply)\*

### Account Engagement:

After the second training, enter a 30-day post-training support period for quick questions/quick calls. Any new project requests over 1 hour will be billed separately. Client: Will notify IMG if additional support hours are required via a change order (additional fees apply)\*

Name	Price	QTY	Subtotal
Sales Cloud Implementation	\$3,800.00	1	\$3,800.00
Account Engagement Plus Implementation	\$4,000.00	1	\$4,000.00
<b>Additional Services</b>			
<input type="checkbox"/> Landing Page Template Creation of template-based landing page using the native Lightning Landing Page builder. Custom CSS/HTML not included.	\$250.00	1	\$250.00
<input type="checkbox"/> Email Template Creation of additional email templates using the native Lightning Email builder	\$200.00	1	\$200.00



Name	Price	QTY	Subtotal
<input checked="" type="checkbox"/> Hour of Training Additional hours of training	\$180.00	4	\$720.00
<input type="checkbox"/> Copywriting Services IMG will provide content for one full engagement sequence, up to 6 emails	\$450.00	1	\$450.00

**Total** **\$8,520.00**

## 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	Nick	Last Name	Parmentola
Email	nparmentola@cumming-group.com	Phone	1 (332) 223-9579
Company Name	MIP One Wall Street Acquisition	Billing Street	14 Wall Street, Suite 803
Billing City/State/Zip	New York	NY	11757

## Primary Contact/Project Manager

First Name	Colleen	Last Name	Gedon-Byrne
Email	cgedon@mackloweprop	Phone	917-635-1634

## 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.

*Colleen Gedou-Byrne*

## 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**     ACH

Company Name

Name on Card

Card Number

Expiration Date                      /   na                      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

Reference number: DCIPN-QPZVQ-ZQHWK-UW5HU

## Signer

Email: cgedon@mackloweproperties.com  
Shared via link

Sent:

Viewed:

Signed:

## Timestamp

28 Feb 2023 16:35:43 UTC

13 Mar 2023 14:21:56 UTC

14 Mar 2023 13:07:07 UTC

## Signature

*Colleen Gedou-Byrne*

IP address: 68.194.185.194

Location: Lindenhurst, United States

Document completed by all parties on:

14 Mar 2023 13:07:07 UTC

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