LeanData Delivery Methodology

Statement of Work

prepared for **<<customer>>**

This SOW is accepted by <<customer>>:

_____   _____
<FIRSTNAME LASTNAME>   DATE
<TITLE>
<EMAIL>

This SOW is accepted by LeanData, Inc.:

_____   _____
Agam Vasani   DATE
VP Customer Success
agam.vasani@leandata.com

LEANDATA, INC. STATEMENT OF WORK

THIS STATEMENT OF WORK ("SOW"), is entered into by <Customer Name>, ("Customer") and LeanData, Inc., ("LeanData") effective as of the date of the last signature above ("SOW Effective Date") and is hereby incorporated by reference into that certain Master Subscription and Professional Services Agreement or other agreement between the Customer and LeanData ("Agreement"). To the extent there are any inconsistencies between or among the Agreement and this SOW, including all Exhibits to this SOW, such inconsistencies shall be resolved in accordance with the following order of precedence: (i) this SOW, (ii) any Exhibits to this SOW, and (iii), the Agreement.

LeanData will perform the professional services described in this SOW, which may include consultation, configuration, integration, project management and training (collectively, the "Professional Services"). LeanData will not start performing such Professional Services under this SOW until both Parties sign this SOW and the Agreement. This SOW and the Agreement constitute the Parties' complete agreement regarding the Professional Services and other matters addressed in this SOW.

1. **OBJECTIVE**

    The customer seeks to implement LeanData as part of their <INSERT SALES PROCESS e.g. Inbound/Outbound/Account Based Marketing> initiative to help <INSERT MAIN STRATEGIC GOAL e.g. streamline the lead generation process>.

    The Key Objectives for the program include:
    - <INSERT KEY BUSINESS OBJECTIVES - Examples below>
    - Improve speed of response on high-priority leads
    - Ensure accurate assignment to correct seller by assigning leads based on account and territory segmentation
    - Reduce manual management and distribution by operations and sales leadership

    The following are the high-level details as part of the implementation :
    - Products : <INSERT PRODUCTS e.g. Matching/Routing/Engagement/BookIt/AOR>
    - Number of Units: <INSERT TOTAL # of Units>
    - Region/Business Unit Per Graph: <BREAK OUT HOW MANY GRAPHS ACROSS OBJECTS ARE NEEDED, CAN DELETE THIS LINE IF NOT USING MG>
    - Regions/Business Units: <INSERT TOTAL # of REGIONS and/or BUs>
    - Salesforce Tenants : 2 (Sandbox and Production) <EDIT IF MORE THAN 2>
    - Timeline : <INSERT # of WEEKS -- standard for Commercial segment is 8 weeks>
    - Start and End date : The start date of this SOW is one week after subscription start date and ends based on the number of weeks
    - Number of hosted pages for BookIt: <INSERT # OF PAGES/FORMS for BookIt>
    - Hosted page links for BookIt : <Paste the link(s) to the hosted web pages/forms for BookIt>
    - Units consumption: <Please describe the path for the consumption of Units over the immediate customer lifecycle. e.g. The customer plans to implement XX units immediately across North America and EMEA, growing by and implementing an additional X units throughout 2023.>

    Customers and LeanData's responsibilities for the project are described in this SOW. Where LeanData is designated to have the primary responsibility for certain activities, successful and timely completion depends on participation by, and key content from, Customer's subject matter experts, as well as decisions and approvals from Customer's leadership team and other assumptions set forth in this SOW. Likewise, where Customer has the primary responsibility for certain activities, LeanData will provide appropriate cooperation and input. Where the Parties are jointly responsible for certain activities, the Parties will collaborate in good faith to resolve issues in accordance with the relevant mutually agreed priorities and the other terms of this SOW.

A summary of scope assumptions, Customer's relevant use cases, and the Parties' respective responsibilities under this SOW appears below. LeanData has relied on this information in estimating the applicable fees, timeline, level of effort and resources required for the Professional Services under this SOW. This SOW is based on current assumptions and information currently known as of the SOW Effective Date. During the "Discovery" phase of the implementation, LeanData will gather additional detailed information about Customer's requirements and use cases, based upon which the scope of the implementation may change, resulting in a Post-Discovery Change Order mutually agreed by the Parties.

2. SCOPE

The following are the in-scope use cases as part of the project:
- <INSERT RELEVANT IN-SCOPE USE CASES - Examples below>
- Distribute leads from small-business accounts based on geography & round robin to sales development team
- Route leads from strategic, enterprise, and commercial accounts to seller covering account's territory
- Institute 24-hour response SLA on high-value inbound leads and re-route to next available sales development rep if SLA is missed
- **Note for Custom Object Routing or Any Object Routing, please mention the number of routing Objects and the names of the Objects in customer SalesForce instance**

The following use cases are considered out-of-scope for this project:
- <INSERT ANY ADDITIONAL OUT-OF-SCOPE TASKS, AS APPROPRIATE>
- The scope of this project does not include routing configurations for any of the following Salesforce objects beyond listed in the scope.
- Any custom actions, objects, or calling to an existing APEX class is out of scope for the purpose of this SOW.
- LeanData deployment excludes any merging of Salesforce instances or mass injection of Salesforce data (mass injection is considered to be 20%+ existing Salesforce size relative to any particular object).
- LeanData deployment excludes any mass update jobs, for example, mass deduping and mass routing/re-routing (mass jobs are considered to be 20%+ existing Salesforce size relative to any particular object). In the case that these services are needed, LeanData can advise on best practices and the Customer will be responsible for execution.

3. PROJECT PHASES, ACTIVITIES AND ARTIFACTS

LeanData has developed a phased methodology, LeanData Delivery Methodology Lite (LDM-Lite), to achieve success in implementing Customer's Go-To-Market strategies. The phased approach provides guidance to the project team with activities and artifacts that need to be accomplished for the success of the following phases:

Phase	Activities	Artifacts	Responsible
Engage	Conduct project kick-off Collaborate on project plan	Kick off presentation Project Plan	Joint (LeanData and Customer)
Discovery	Requirements Gathering	Implementation questionnaire	Customer (fills out response)

	SFDC Sandbox	SFDC Sandbox with access to LeanData personnel (preferably copy of Production)	Customer
Build	Sandbox Build completion	Build review with customer	LeanData
Test	System testing and Defect Resolution	Customer: Details of use cases, test plan and result. LeanData: Defect Resolution and re-configuration for LeanData-related issues	Joint (LeanData and Customer)
Deploy	Deploy to Production	LeanData live in Production	LeanData, on Customer's approval
Hypercare	Monitor and troubleshoot issues Creation of offboarding documents Hand over to Customer Success	Project wrap-up presentation Introduction call to Customer Success	LeanData
Training	LD Admin Training	Share standard training documents	LeanData

4. ROLES & RESPONSIBILITIES

LEANDATA ROLE	RESPONSIBILITIES
Account Executive	Point of contact for account-level needs and services expansion. Liaison to facilitate meetings and project manage services/artifacts
Project Manager	Manage timelines, project risk and communications, track and resolve issues
Solutions Architect	Gathers business requirements, designs the process flows, Implements configurations for LeanData and provides implementation best practices. Certified LeanData Consultant.
Consultant	Implements configurations for LeanData and provides implementation best practices. Develop custom code, if any, to fulfill the requirements. Certified LeanData Consultant.
Solution Engineer	Develop custom code, if any, to fulfill the requirements. Certified LeanData Consultant.

<Customer Name> ROLE	NAME	CONTACT	RESPONSIBILITIES

Project Manager			
Salesforce Administrator			
Other			

5. **PRICING**

The tasks above will be completed on a time and material basis, using the LeanData standard workday of 8 hours. The charts below provide the phases and effort by role for the project duration.

Phase	Weeks
Engage	1
Discovery	2
Build	2
Test	1
Deploy	1
Hypercare	1
TOTAL	8

LeanData Role	Standard Rate/Hr	Hours	Total USD
Project Manager Consultant	$250.00	XX.00	**$XX.00**

LeanData shall notify Customer when costs are projected to exceed this estimate, providing the opportunity for Customer and LeanData to resolve jointly how to proceed. Any additional requests or mutually agreed-upon additional hours required to complete the tasks shall be documented in a change order Exhibit to this SOW and signed by both parties. **Additional hours will be billed at Standard Rate/Hr.**

Payment Terms:

Fees are due prepaid in the amount shown above and on the accompanying Order Form. The amount will be due per the payment terms of the Order Form and are not refundable. The SOW and the associated hours expire 90 days from the Subscription Term start date on the Order Form.

Fees shall be due upon receipt and sent to the following Customer contact as follows:

Company Name:	\<COMPANY NAME\>
Billing Contact Name:	\<BILLING CONTACT NAME\>
Billing Address:	\<ADDRESS, CITY, STATE, ZIP\>
Billing Email:	\<BILLING EMAIL ADDRESS\>
Purchase Order Number:	\<Options : "Same as OF", "N/A" or actual PO provided by customer\>\>

6. ASSUMPTIONS

The following are the assumptions as part of the SOW

- Upon successful LeanData managed app installation, leads and accounts will be "touched" by the LeanData managed application. While no existing data will be deleted or updated, this may cause the lead and/or account's "last modified date" to be updated to the current date when either object is "touched" by LeanData's managed application).
- LeanData Professional services will require access to the customer's SFDC's sandbox and production tenants for the configuration of LeanData; and, the customer will be responsible to ensure appropriate access is granted for the duration of the project.
- Customer is responsible for obtaining any and all approvals for the artifacts. LeanData suggests that the approval (or disposition) to the artifacts be received within three (3) business days and the number of approvers be less than three (3).
- All project management, training and enablement, change management will be the responsibility of the Customer as part of the LDM-lite delivery model that has been proposed on the request of the customer.
- For additional requests outside this SOW, LeanData shall work with Customer to determine if an additional SOW is required or determine alternate methods to remedy the request.
- For Custom Object Routing product, custom triggers would be created as part of the implementation and customer to authorize the creation of the triggers in their Salesforce environment.
- All work as described in the SOW will be performed remotely and no travel is included.
- To initiate and start the project (i) This document should be signed (ii) The customers' project team and availability confirmed (iii) LeanData will assign personnel to initiate this project 2 - 3 weeks after the signature of this SOW.
- Customer responsibilities
    - Implementation schedule is contingent upon execution of tasks outlined in the activities and artifacts. Customer adherence to the schedule with the commitment of resources and timeline are critical to the success of the project. Any deviation from the proposed timeline will result in change.
    - Customer will conduct all required testing.
    - Customer will share all Salesforce details pertaining to configurations, including but not limited to: User IDs, fields/values, Queue IDs, Assignment rule IDs, etc.
    - Customer will provide access to the Sandbox environment for LeanData, including Author Apex and Remote Login Access or front-end Salesforce login (for deployment configuration and debugging purposes).
- Change Management
    - The results, accuracy, and contents of LeanData's artifacts are dependent upon the content and accuracy of information provided by Customer during the initial project scoping and during the day-to-day project activities.

APPENDIX A: CHANGE REQUEST FORM

This Change Order ("CO"), is effective as of signature of the document ("CO Effective Date") and is being entered into in accordance with and pursuant to the SOW by and between <<customer>>, ("Customer") and LeanData, Inc., ("LeanData"), dated <DD/MM/YYYY>, ("SOW").

Whereas all of the services in the SOW have been completed, the following Change Order defines the additional or change in services.

The following provides the details of the changes as part of the CO :

Project	
Change Requestor	
Change Number	
Associated PO	<Options : "Same as SOW", "N/A" or actual PO provided by customer>>

Change Category (Select all that apply):

Schedule	☐	Cost	☐	Scope	☐
Testing (Quality)	☐	Resources	☐	Artifacts	☐

Reason for Change:
<<Provide the reason and high level details of the change>>

Change Description:
<Provide the details of the change>>
<<Include the revised schedule, artifacts and activities>>

Additional Resources and Costs for this Change:

Role	Rate/Hr	Hours	Total USD
Consultant	$XX.00	XX.00	$XX.00

Fees are due prepaid in the amount shown above and are not refundable. Fees shall be due upon receipt and sent to the Customer contact listed on the SOW.

Approved by (Customer):   **Approved by LeanData, Inc. :**

Name :   <<template>>   Name :   <<template>>
Signature :   <<template>>   Signature :   <<template>>
Date :   <<mm/dd/yyyy>>   Date :   <<mm/dd/yyyy>>