

## **STATEMENT OF WORK**

This Statement of Work (“SOW”) between Meitasoft Corporation (hereafter “Meitasoft”, “we”, “our”, or other similar descriptor) and [customer] (hereafter “[customer], the Customer”, “you”, “your” or other similar descriptor).

### **RightPath Implementation Package for Marketing**

The *RightPath* Implementation service is a package of professional services that is designed to help you realize the benefits of marketing automation quickly, safely, and cost effectively. The package is designed for new MarketFirst customers. We work together as a team to define your marketing automation goals and then translate those into your top priority campaign. This campaign then becomes the focus of the *RightPath* project rollout to aid in your MarketFirst education. The campaign we identify is then designed, developed and launched on your MarketFirst marketing automation platform. The package supports closed loop campaign performance reporting to allow you to measure the selected campaign and improve your results. Lead generation campaigns can include lead qualification and distribution of hot leads to your Pivotal CRM. We’ve also carefully designed your package to provide the right type and amount of training so you can attain self-sufficiency quickly and safely so you extend and re-launch your initial campaign and develop new campaigns on your own. After deployment and training your company may leverage and reuse the starter campaign to address many more marketing business requirements and new initiatives.

Your MarketFirst *RightPath* deployment package includes 27.5 professional services days which is normally sufficient to meet our customer’s rollout needs. In this document we’ve included guidelines, constraints, and check points to ensure that when we stay within budget. If needed, we can extend the number of professional services days under the change management process defined within this document, to meet your unique and additional needs.

### **RightPath Approach and Deliverables**

Your *RightPath* Implementation package includes the following major project phases and deliverables:

1. Assignment of your Meitasoft project leader to guide you through the *RightPath* deployment process
2. Planning workshops
  - o Starter campaign selection, requirements, and design with your Marketing team
  - o Technical environment planning, sizing, and installation with your Technical Team
3. Project plan creation and project and budget weekly reporting
4. Installation and configuration of MarketFirst and the MarketFirst /Pivotal Connector
5. Connector extension to meet your specific needs
6. Marketing DB configuration and loading
7. Starter campaign implementation, testing, launch, and performance review
8. Training and knowledge transfer
9. Lessons learned and next step planning follow on meeting

### **Marketing Planning Workshop**

The Marketing Planning Workshop is a 1 day session, facilitated by your Meitasoft, leader to help you understand marketing automation using MarketFirst and the types of campaigns that are available to support your business needs and how to apply MarketFirst to solve them. The session is attended by Marketing and sometimes IT or Webmaster (if marketing does not have sufficient HTML skills).

The goals for this 1 day, on site session, are:

1. Assignment of your Meitasoft Project Leader and identification of your project leader
2. Capture your near term goals for marketing automation with the team
3. Identify the top 3 initiatives that satisfy those goals
4. Prioritization of the initiatives and selection of one to be the subject of our *RightPath* rollout, the “starter campaign”

5. We translate the starter campaign into requirements that will guide its development. We capture the requirements in a “Campaign Brief”. It is likely that one or two follow-on telephone conference sessions will be required to complete the Brief with enough detailed information to say that the project fits into the number of days (5) allotted within this package. Within the session we complete the Brief with the following campaign information:
  - a. Your group/division name
  - b. Primary contact person (name, email, address and phone number)
  - c. Campaign name
  - d. Campaign description overview
  - e. Success metrics
  - f. Desired launch date
  - g. How will the audience be provided (imported list, segment of the MarketFirst DB)
  - h. Campaign design
    - o Describe the campaign process flow as steps and “rules” (e.g. lead ranking) and “trigger events” (e.g. if lead is an “A” lead send to Sales).
    - o Identify the major documents and personalization areas and their “rules”.
  - i. Describe the reporting requirements
  - j. Provide the contact information of person(s) who will provide the campaign’s content and creatives
  - k. What is the source of the privacy statement and opt-out language
  - l. Names of people who will take the MarketFirst Essentials and Power Users Class

## **Technical Planning Workshop**

The Technical Planning Workshop is a 1 day session, facilitated by your Meitasoft leader. The purpose of the Technical Planning Workshop is to prepare for your MarketFirst installation. This requires us to have a good understanding of how you intend to use it in terms of data, data flows, email, web, DB size. We'll also gain and understanding of how your network and DMZ are set up. With this information we'll be able to plan next steps for the installation. Note that other details will be covered in 1/2 day MarketFirst System Admin training.

Who should attend? The workshop is primarily attended by IT, those that will plan and assist in the installation and care of MarketFirst. Since your MarketFirst will work with your Pivotal system, via standard integration software (Connector), the IT person(s) responsible for Pivotal should also attend. Also, someone with an understanding of your email and web server, network, and DMZ set up should also attend.

Part 1/Day 1 - Level setting, Architectures, & Maintenance

- You will explain the business usage of MarketFirst/Pivotal and the envisioned supporting system
- Overview of MarketFirst technical architecture
- Overview of the integration between Pivotal and MarketFirst
- Maintenance; daily, monthly

Part 2/Day 2 - Installation planning

- Review pre-installation checklist: (note that details are covered in 1/2 day MarketFirst System Admin training)
- App server
- DB server
- Email server
- Web Server/DMZ set up
- DB loading - process, options
- Configuration
- Security
- Sizing:

# Meitasoft

Marketing Automation Solutions

- Marketing DB (how many contacts are estimated 3 years out? How many profiles?)
- Web activity (how many peak hits are anticipated?)
- Email activity (what is the size of the largest mailing?)
- Remote installation planning - Identify the point person to assist and gain installation knowledge

Notes:

1. It should be noted that follow-on telephone/Webex meetings will likely be required to completely capture the installation and integration requirements.
2. An important goal for the Marketing and Technical Workshops is have enough detail to be able to estimate whether the efforts will “fit” within the RightPath package.

## **Installation of MarketFirst**

MarketFirst will be installed after the Technical Planning Workshop and after the 1 or 2 installation readiness phone calls. The installation is performed remotely and coordinated with your IT installation leader that was appointed in the Technical Workshop.

## **Installation of MarketFirst/Pivotal Connector**

The MarketFirst/Pivotal Connector will be installed after the installation of MarketFirst. The installation of the Connector requires Pivotal to be up and running. We will coordinate the installation of the Connector with your Pivotal IT staff. The Connector is tested end-to-end to ensure OTB data is exchanged in both directions.

## **Extension of the MarketFirst/Pivotal Connector**

The “Connector” software between MarketFirst and Pivotal synchronizes OTB fields and the new fields between the Pivotal ‘s database and the MarketFirst database. It also passes leads and changed contact fields in both directions. The OTB data supported by the Connector is normally extended to satisfy the customers unique business needs. RightPath allows up to 10 additional fields, if needed. The Extension service is a 1 day, on-site session, and includes a gap analysis of the OTB fields and flows versus your needs which are normally defined by your Pivotal system’s customizations or the needs of your marketing priority initiatives. The session should include IT people who have taken the MarketFirst integration class (the focus is MarketFirst and Pivotal) and someone from Marketing that can determine what fields are needed to support the near term Marketing initiatives and future initiatives. The session is led by Meitasoft. Any gaps will be reviewed with Marketing and IT before the extensions are made. This work maybe done remotely or on site.

Notes:

1. Additional fields must be on Contact and Lead Objects in Pivotal
2. Must follow the Connector’s OTB business logic
3. The additional fields must already exist in Pivotal i.e. no special functions are needed to derive or create the fields
4. The “Connector” is designed to work with the standard, not-modified Pivotal at the version 6.0

## **MarketFirst Database Configuration and Loading**

To support your RightPath campaign and future campaign needs Meitasoft and Marketing will define the requirements for your campaigns, segmentation and personalization. These are then configured as “profiles” in the MarketFirst database. Within this package up to 20 additional profiles maybe set up. Note that the requirements for segmentation and campaign personalization may cause a change to the Connector.

Marketing database loading - Your contacts from Pivotal or a CSV file (preferred) are loaded into your MarketFirst database using the Connector or the MarketFirst list import/export utility. The list can include both contact and up to 20 supported profile fields. Note that historical time series type data sets such as the last rolling 10 purchases are not



Marketing Automation Solutions

in scope. Data is assumed to be clean requiring no data scrubbing of deduping. Meitasoft and IT will work together remotely to accomplish this task.

### **Starter Campaign Creation**

The campaign selected in the Marketing Workshop and described by the completed Campaign Brief is created in your MarketFirst. Your Meitasoft leader will develop the campaign and use to teach the trained Marketing team how it works and how it can be reused and extended. The development of the campaign is done remotely while the training is done via Webex. Together the team will launch it and review the results.

The campaign can be any of the following types or their variants:

- Acquisition; web lead capture, or self-service campaigns such as white paper downloads, “contact us”
- Event management; e.g. trade shows, seminars, webinars. Event management consists of invitations, web-based registration, reminders to register (2), reminders to attend (2), attendance recording, follow-up mailings (2) and workflows to support
- Contract renewal
- Lead generation; direct marketing campaigns; offers, promotions, contest, surveys
- Nurturing campaigns; automated communications that are designed convert leads. We constrain the number of timed documents in a multi-wave campaign to 4.
- Relationship/retention campaigns; newsletter or surveys. We constrain the number of newsletter sections/articles to 10 and number of survey questions to 20.
- Win back campaign
- Your campaign may be lead generation types and can include lead qualification and ranking based on business rules you will provide.
- Hot leads are sent as emails to up to 5 email addresses which could be sales managers/ reps.

### **Needed from Marketing:**

1. Completion of the Campaign Brief with your Meitasoft Leader
2. Identification of desired launch date for the campaign
3. Content and creatives for all documents, including rules for personalization
4. Any external links to be included in the communications such as privacy page or external pages
5. Email wrappers and style sheets
6. Reporting requirements beyond those defined in this document
7. Electronic literature attachments in PDF, MS Word, etc format
8. Identification of the campaign testers who will review and approve all documents (emails and web forms)

Campaign Testing – your campaign is launched to your team for review and comment. Up to 2 review and rework cycles are supported. The changes in each cycle, after the initial delivery of the content, must be minor e.g. grammar, spelling, punctuation, and minor reformatting to stay within budget. These tasks are accomplished via conference calls.

Final launch and monitoring – we launch your campaign with your approval and remotely monitor the launch to ensure its success. These tasks are accomplished via conference calls.

Lessons learned review and next step planning– one week after each launch the team meets in a conference call to review the final performance reports against the campaign’s target metrics. We will discuss and recommend improvement areas. This is also the time to focus on next steps to address the remaining top priorities.

Notes on your Campaign Performance Report(s) - RightPath includes the configuration of up to 2 OOTB standard campaign performance reports to measure:

- eMail stats (HTML mail sent, opened, bounced, and failed)
- Click through and response rates
- Survey results reports
- Lead quality reports

# Meitasoft

Marketing Automation Solutions

- and other standard reports

Note that custom reports or web-based Marketing Managers “Dashboards” are also useful and maybe include as a change in scope.

Blueprinting – your campaign is blueprinted to support its reuse and extension for future launches

Notes:

1. The ½ day post launch review and next step planning is conducted one week after launch.
2. Remote access to your MarketFirst is needed to develop the campaign and to troubleshoot the system. The Access to the full MarketFirst client software is required and provided by the customer to the Meitasoft consultant during the project.
3. The customer will take the lead role on Campaign selection, strategy, content development, and rollout

## **Training**

RightPath is designed to help you reach your self-sufficiency goals quickly by providing onsite training (maximum of 10 people per session). Custom training coverage includes appropriate material from the following classes:

1. MarketFirst Essentials and Power User (at least one student should be familiar with HTML coding)
2. MarketFirst Integration class – How the Connector works and how to Extending it
3. MarketFirst System Admin training – How to manage your MarketFirst, what to back up, the logs, etc.

## **Notes on MarketFirst Essentials Training**

1. One 5 day custom training session for campaign developers is included
2. The session is hands on and Meitasoft instructor led
3. You will be responsible for ensuring students have PCs with the MarketFirst client installed
4. The goal for the session is to provide the team with what they need to accomplish their work

## **Professional Fees**

This is a 27.5 day time and material *RightPath* package that includes check points after the detailed requirements workshops for re-evaluating the estimates and plans. Meitasoft strongly recommends that risk adverse customer add a contingency factor to their budget if needed.

Major Task Name	Days
Planning workshops	
marketing	1.5
technical infrastructure	1.5
Install MarketFirst	2.5
Install OTB Connector	2
Add 10 additional fields to the Connector	5
Move from Dev to Production	0.5
MarketFirst DB Config and Loading	2.5
Starter campaign	6
Training:	
MarketFirst Essentials and Power Users	5
MarketFirst Integration class	0.5
MarketFirst System Admin training	0.5

# Meitasoft

Marketing Automation Solutions

Total Days	27.5
Hours	220
<b>Cost</b>	
Rate	

Notes:

1. Approved expenses to be invoiced as incurred.
2. Estimates are in US dollars and we have not included estimated travel and entertainment expenses.
3. Any necessary travel expenses shall first be reviewed with Customer before arrangements are made. Travel and expenses will be reasonable and customary.
4. All travel-related expenses billed to the customer will reflect actual costs.
5. Any out of scope work or variances to our estimating assumptions requiring additional work or resulting in project delays will be presented to the customer for approval, and will be invoiced separately. Details are found in the “Scope Change Management Process” section.

**Schedule of Events:**

Event Name	Attended By (always Meitasoft plus)	Start Date	Duration	Comments
Technical Work Shop	IT	Date is TBD	1 day	Onsite
Installation Readiness Call	IT	Date is TBD	30 mins	Conf Call
Installation of MarketFirst	IT	Date is TBD	2 days	Remote access
Integration Class	IT	Date is TBD	1 days	Webex
Installation of Connector	IT	Date is TBD	2 days	Remote access
Connector Gap Analysis	IT, Marketing Lead	Date is TBD	1 day	Onsite/Webex
Connector Extension	IT	Date is TBD	3 days	Remote access
System Admin Training	IT	Date is TBD	.5 days	Webex
Marketing Workshop	Marketing Leaders	Date is TBD	1 day	Onsite
MarketFirst Essentials & PU Training	Marketing	Date is TBD	5 days	On site
Database Config & Loading	IT, Marketing (PT)	After Marketing Workshop	1 day but the actual load could run multiple days	Remote access & conf calls
Starter Campaign Development		Date is TBD	4	Remote access
Starter Campaign Training	Marketing (PT)	Date is TBD	1	Webex

Campaign launch & monitoring	Marketing (intermittent)	Date is TBD	½ day	Remote access
Post Launch Review	Marketing	Date is TBD	½ day	Webex
Project management	Customer project lead			Phone

Note that dates shown above as TBD above will be firmed up as an output of the Marketing Workshop.

## **Project Assumptions**

1. Meitasoft requests that the Customer be responsible for data cleansing using templates provided by Meitasoft, including data dictionaries in such templates. Subject to the foregoing, this includes, but is not limited to, cleansing, de-duplication, and standardization of data formats.
2. Meitasoft requests that The Customer provide cleansed data in the recommended format (most likely a CSV file) by the date specified in the project plan.
3. Meitasoft will not be responsible for application speed or response times as we cannot control the infrastructure or server/client configurations.
4. The Customer will be responsible for hardware configuration per Meitasoft's recommendations. The Customer recognizes memory, hard drive, and CPU requirements will be a function of application complexity and data volumes.
5. Meitasoft assumes The Customer will provide a project lead who has the complete depth of understanding of technical and business issues.
6. Time and schedule estimates are based on Meitasoft's experience with other similar change or services requests in the past, the information available at the time of preparing the estimate, and working with available Meitasoft resources at Meitasoft facilities within a normal working day. The Customer understands that final time and delivery dates and costs could vary due to the accuracy, completeness and timeliness of information provided to Meitasoft by The Customer and others; responses; changes and interim approvals from the Customer, and system problems, expedited performance scheduling, or other events beyond the reasonable control of Meitasoft.
7. It is extremely critical that project decisions be made in a timely fashion due to project time frames. It is assumed that requests for information from The Customer will be fulfilled by the next business day. It is assumed that signoff of deliverables will be received within two business days.
8. The Customer is responsible for obtaining training manuals and materials from CDC Software. Meitasoft does not provide training materials.
9. Any additional scope will be identified and approved through the appropriate Change Management procedures (please refer to the section entitled "Scope Change Management Process").

## **Scope Change Management Process**

In the event one Party requests a change in any of the specifications, requirements, or scope (including drawings and designs):

- The Party seeking the change shall, by written notice, propose the applicable changes in the Work Assignment. Within forty-eight (48) hours of receipt of the written notice, The Customer and Meitasoft's Project Leaders shall meet to discuss the proposed changes. The Parties shall subsequently agree on any such changes and the changes shall be documented in writing signed and dated by both Parties, and Milestone dates will be adjusted accordingly.
- In the event that the Parties disagree regarding proposed changes to the general scope of the Work Assignment, the Parties shall within forty-eight (48) hours from the date of the meeting of the described above, identify a senior management officer who has decision making authority for each of the respective Parties, and such officers shall confer and work to reach agreement regarding the proposed change. The



# Meitasoft

Marketing Automation Solutions

Parties shall subsequently agree on any such changes and the changes shall be documented in writing signed and dated by both Parties, and Milestone dates will be adjusted accordingly.

## **Acceptance Process**

Meitasoft and The Customer shall host delivery and acceptance meetings on each Acceptance Meeting Date identified in the project plan. At the Delivery Meeting, Meitasoft will review work completed supporting the scheduled delivery and will provide evidence that the work product and deliverables have been provided to Custom Decorators. Based on complete delivery, The Customer will provide written notice of acceptance. In the event the deliverables are not acceptable to The Customer in its reasonable determination, The Customer and Meitasoft will work together to define the acceptance criteria and how that affects the milestone delivery dates.

## **Project Reporting Standard**

Weekly status reports consisting of milestone reporting, outstanding open issues and tasks, and time accounting versus budget will be distributed electronically to all Steering Committee members throughout the duration of the project.



## ACCEPTANCE OF STATEMENT OF WORK

This Statement of Work incorporates all terms and provisions of the Agreement, and is valid only if signed by both parties. Each party represents that the individual signing on its behalf has read this Statement of Work, understands it, and has full authority to bind that party.

[Customer]

MEITASOFT Inc.

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Effective Date

\_\_\_\_\_  
Date

## Appendix A – Examples of business requirements that can be met using MarketFirst

Your company may leverage MarketFirst’s marketing automation platform and campaign management tools after deploying the RightPath package to address following marketing business requirements. Here are some examples:

### 1. Create net new revenue...

- Increase lead capture rate – you can capture leads in an automated and consistent way from your MarketFirst based-campaigns. These campaigns follow our best practice guidelines to yield the best results. These include web self-service and “contact us” pages. Other campaigns create net new leads which include automation of your events, cross/up sell campaigns; in-sales-office kiosks will provide web-based sign-ups.
- You’ll improve the quality of the data your capture by using a consistent web-based forms and their built-in data and dedupe checking functions.
- You’ll track each lead source and the quality of the leads that they generate to be able to manage ad channel spending more effectively.

### 2. Improve response and conversion rates...

- Your audience will want to interact with your attractive emails & web forms.
- You’ll use campaign process automation to deliver the right message at the right time by identifying the “workflows” and “events” that trigger your communications.
- In doing so your event driven communications can be relevant and will more likely to be opened and read. Studies have also shown that personalized communications are far more effective than generic messages. Your communications’ content can be tailored to contact’s profile and preferences (where they are in the sales cycle, the type of property they are interested in etc.), touch history, or how they’ve responded to your surveys.
- You’ll be able to identify the right audience for your campaigns by using MarketFirst’ powerful segmentation and query tools e.g. people who have expressed interest in a developing community or targeting an audience for cross selling and up selling opportunities based on the products and services they already own.

### 3. Automate marketing business process for time and cost savings...

- Automate warm and cold lead nurturing with multi-track, multi-wave campaigns that are designed to convert you leads without human involvement freeing sales to focus only qualified leads
- Event management can be automated to send your invitations to your targeted audience with a link to your MarketFirst hosted registration page. Automated timed reminders to register and attend increase enrollment and attendance. Your automated follow ups will help move the sales process along and increase conversion rates
- Automate collateral fulfillment and apply the marketing maxim “...give something and ask for something”. Ask for email, basic contact, house preferences, and 2-3 qualifying questions before providing the downloadable file or sending off snail-mail fulfillment request.

### 4. Measure what you do with extensive closed-loop campaign performance reporting including.

- ♦ email stats (sent, opened, bounced, failed, and opt-ed out)
- ♦ click through rates
- ♦ lead sources
- ♦ lead quality
- ♦ survey reports
- ♦ other standard and custom reports

### 5. Provide sales with a complete and integrated view of prospect’s interactions with marketing - in addition to leads created from which campaigns your automated campaigns will log significant marketing activities to the Meitasoft Sales Portal so sales can see that a contact has a registered for community X event or completed new home buyer survey.

### 6. Minimize deployment risks and save time and money - eMail and Internet marketing on your MarketFirst platform is one of the most powerful and effective forms of marketing used today. It is quick to

# Meitasoft

Marketing Automation Solutions

deploy, offers immediate highly measurable results, enables advanced segmentation and personalization and delivers a high return on investment. But to achieve the maximum results from your campaigns requires experience and expertise. To help marketers optimize results from their marketing efforts our professional services team follows a proven implementation method and follow industry best practices and have c compiled their own extensive best practices