

# Statement of Work (SOW)

## Momentum Elite Core

### One-Time Services

## Project Summary

Provider will work with Customer to complete the following as a part of this project:

- Momentum Elite Core Onboarding

## Assumptions

### Elite Core Onboarding

Customer has subscribed to Momentum Elite Core. Provider's approach to onboarding is a shared effort with Customer. The Customer's team will be expected to configure elements of the Services, perform data entry work, and test workflows throughout the onboarding. This work coincides with training from the Provider's team.

Over the course of onboarding, the Customer should expect to spend approximately six (6) hours over two (2) weeks on the project for best results. If the Customer is not able to dedicate the time and/or resources at any point throughout the onboarding, additional fees may be incurred, and project timelines will be impacted.

The Provider will work with the Customer to complete base onboarding, configuration, and Customer team training for a single tenant. The training portion of this project will include recorded videos and configuration work that the Customer team must complete before attending remote instructor-led trainings. All instructor-led trainings will be recorded.

Process documentation will be managed by the Customer with specific software processes outlined throughout the onboarding.

## Limitations

### Elite Core Onboarding

The Services will be configured with the features and capabilities of the current release of the Services.

## Scope of Services

---

### Kick Off

#### **Provider responsibility**

- Internal handover and preparation.

#### **Customer responsibility**

- Ensure project scope is accurate and fully aligns to all business requirements.
- Raise any risks, blackout periods for software release, resourcing plan.

### Design

#### **Provider responsibility**

- One (1) sixty (60)-minute remote training on System Admin configuration; session will be recorded.

#### **Customer responsibility**

- Customer Project Lead to complete self-guided recordings prior to completing System Admin Configuration Wizard.
- Complete System Admin Configuration Wizard prior to remote training.
- Ensure key project resources are selected and attend remote training session.

### Build

#### **Provider responsibility**

- Add standard reports and dashboards to Customer Elite Account.

### Training

#### **Provider responsibility**

- Up to one (1) 90-minute remote training session, session will be recorded.
- Provider will endeavor to complete training within two (2) weeks once initial build and configuration is complete, provided customer is available.

#### **Customer responsibility**

- Ensure appropriate users are selected and attend all training sessions.
- All users will be expected to complete the designed curriculum in the Provider's Learning Center.

## Launch & Post Launch

### **Provider responsibility**

- Internal handover
- Project Closure

### **Customer responsibility**

- Complete customer satisfaction survey.

## Project Management

### **Provider responsibility**

- Coordination of resources, activities, and scheduled meetings in alignment with timelines and milestones.

### **Customer responsibility**

- Nominated project lead.
- Coordination of activity and resources on customer side to align to project plan and schedule.

## Exclusions

- Custom development
- Integration services
- Data migration
- Data import

## Project Schedule

The estimated timeline for this project is 3 weeks. However, Provider and Customer will create and agree to a joint project plan. The plan is *an estimate* and subject change.