Statement of Work (SOW) -
Momentus Elite Premier Onboarding One-Time Services

Project Summary

Provider will work with Customer to configure, onboard, and train on Elite using the Elite Learning and Launch Intelligent Experience (ELLIE).

Assumptions

- Customer is subscribed to Momentus Elite Premier.
- Onboarding is led primarily by ELLIE, Momentus' AI onboarding agent, which provides guided tasks, learning prompts, and structured workflow progression.
- Customer engages directly with ELLIE to complete configuration and onboarding activities.
- Provider provides guidance, validation, and support but does not lead daily execution.
- Customer is available to complete assigned tasks in ELLIE in a timely manner.
- Standard platform functionality is used unless otherwise agreed.
- Decisions and required inputs are provided by Customer when prompted by ELLIE.

Limitations

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

Scope of Services

Kick Off

Provider Responsibility:
- Internal handover and preparation.
- Up to one (1) 60-minute kickoff session.
- Review questionnaire responses and validate onboarding direction.
- Introduce guided onboarding workflow through ELLIE.
- Confirm roles, expectations, and milestone structure.

Customer Responsibility:
- Complete onboarding questionnaire prior to kickoff.
- Ensure project scope is accurate and fully aligns with all business requirements.
- Raise any risks, blackout periods for software release, resourcing plan.
- Ensure key project resources and stakeholders can attend kick off meeting.
- Provide required organizational and workflow inputs; rate sheets, venue maps, etc..
- Ensure appropriate users attend kickoff.
- Confirm onboarding goals, priorities, and launch timeline.

Design

Provider Responsibility:
- Deliver guided design activities through ELLIE.
- Provide best-practice recommendations.
- Facilitate up to one (1) 60-minute review call to support decision-making and validation.
- Offer chat-based support for clarification or data validation.
- Monitor onboarding progress through defined milestone checkpoints.

Customer Responsibility:
- Complete guided design activities.
- Make required configuration decisions.

Build

Admin and End User Training

Provider Responsibility:
- Configuration of standard base templates such as hold confirmations, proposals, estimates, event orders, post-event reports, invoices, receipts, & credit memos.
- Minor adjustments to the standard base templates such as adding logos, modifying fonts, font sizes, and color. Budget-intensive customizations are out of scope.
- Configuration of up to five (5) custom contract document templates.
- Add standard reports and dashboards to Customer Elite Account.

Customer Responsibility:
- Review completed document templates with project team and any internal stakeholders in a timely manner.
- Provide feedback to Provider for adjustments through ELLIE.

Training

Provider Responsibility:
- Deliver in-app guided learning through ELLIE.
- Provide strategic guidance during scheduled sessions to address risks, clarify decisions, and ensure adherence to best practices.
- Facilitate up to four (4) 60-minute working sessions for complex topics or blockers.
- Offer chat-based support for clarification or escalation during onboarding.
- Monitor onboarding progress through defined milestone checkpoints.

Customer Responsibility:
- Complete training activities
- Follow guided workflows

Testing

Provider Responsibility:
- Provide structured testing checklists and validation workflows via ELLIE.
- Support troubleshooting.

Customer Responsibility:
- Prepare for and execute user testing.
- Complete two (2) "dress rehearsals" following Provider's Momentus Elite Dress Rehearsal Best Practices article prior to working sessions.
- Confirm operational readiness.
- Promptly raise any issues found (that are within the scope of work).

Launch and Post-Launch

Provider Responsibility:
- Provide go-live readiness guidance via ELLIE.
- Facilitation one (1) 60-minute launch call (go-live readiness session).

Customer Responsibility:
- Ensure key resources attend launch support session.
- Complete a full account review and audit (users and roles, calendar and list views, report and dashboard sharing).
- Promptly raise any issues found (that are within the scope of work).
- Complete customer satisfaction survey.

Project Management

Provider Responsibility:
- Maintain a structured onboarding plan through ELLIE, including task sequencing, milestone tracking, and progress visibility.
- Deliver automated reminders, guided next steps, and workflow prompts through ELLIE to support consistent progress.
- Monitor onboarding progress through defined milestone checkpoints.

Customer Responsibility:
- Nominated project lead.
- Coordination of activity and resources on customer side to align to project plan and schedule.
- Engage actively with ELLIE-guided onboarding tasks.
- Provide timely inputs, decisions, and feedback
- Raise risks or blockers through scheduled sessions or chat support.

Exclusions

- Custom development or configuration outside standard onboarding workflows.
- Consultant-led full build execution; ELLIE facilitates the majority of step-by-step implementation.
- Extensive redesign or re-architecture beyond defined onboarding milestones.
- Data cleanup, migration beyond agreed scope, or historical restructuring unless specified separately.
- Ongoing consulting beyond milestone sessions and chat support.

Project Schedule

The estimated timeline for this project is 8-10 weeks. However, Provider and Customer will create and agree to a joint project plan in writing (email acceptable). The plan is *an estimate* and may change upon mutual written agreement.