

**Onboarding Packages  
(if applicable)**

**1.1. SALESmanago - Essential services offering**

Number of Service Units: **30 SU**

- 1) Complete discovery sessions to determine business requirements for the workflows, contact forms, dashboards and other functionalities for Customer's live of the System, including:
  - a) Kickoff meeting
  - b) Discovery session
  - c) Scope, schedule & reporting planning meeting
- 2) Provide access to the project portal established for complete project management
- 3) Work with Customer to fully populate and utilise the environment
  - a) Configure System environment
  - b) User set-up
- 4) Data discovery and architecture workshop
  - a) Work with Customer to document the necessary attributes for the System contact and event data
  - b) Mentoring and documentation for maintaining all data imports and transfer, and the ongoing integration of data
  - c) User Acceptance Testing (UAT) criteria

**Unless agreed upon in writing, if data is not ready or available for integration with the system prior to the implementing phase of the engagement (typically, Week 3), this shall be excluded from project scope.**

- d) XML file integration
  - e) DKIM (DomainKeys Identified Mail) and SPF (Sender Policy Framework) configuration completion
- 5) Complete the training and enablement sessions and provide the Customer with:
  - a) Live Q&A sessions to address specific use cases and challenges
  - b) documentation and self-paced learning resources for users to get familiar with the System
  - c) Up to one (1) preparation meeting with new Customer System operational and technical stakeholder to prepare for the go-live
- 6) Design and implementation of workflows (up to 3), **not to exceed 3 System workflows**
- 7) Final go-live of above-mentioned System implementations - onboarding and implementation review
  - a) Status report
  - b) Roadmap development and next steps
  - c) Review ongoing services needs
- 8) Project summary meeting

**1.2. SALESmanago - Standard services offering**

Number of Service Units: **60 SU**

- 1) Complete discovery sessions to determine business requirements for the workflows, contact forms, dashboards and other functionalities for Customer's live of the System, including:
  - a) Kickoff meeting
  - b) Discovery session
  - c) Scope, schedule & reporting planning meeting
- 2) Provide access to the project portal established for complete project management
- 3) Work with the Customer to fully populate and utilise the environment
  - a) Configure System environment
  - b) User set-up
  - c) Initial setup of System business dashboard

- 4) Data discovery and architecture workshop
  - a) Work with the Customer to document the necessary attributes for the System contact and event data
  - b) Mentoring and documentation for maintaining all data imports and upload processes, and the ongoing integration of data
  - c) User Acceptance Testing (UAT) criteria

**Unless agreed upon in writing, if data is not ready or available for integration with the System prior to the implement phase of the engagement (typically, Week 3), this shall be excluded from project scope.**

  - d) XML file integration
  - e) DKIM (DomainKeys Identified Mail) and SPF (Sender Policy Framework)
- 5) Contact data integration
  - a) Initial load of contacts to the System
- 6) Complete the training and enablement sessions and provide the Customers with:
  - a) Offering live Q&A sessions to address specific use cases and challenges
  - b) Providing documentation and self-paced learning resources for users to get familiar with the System
  - c) Up to two (2) preparation meetings with new Customer SALESmanago operational and technical stakeholder to prepare for the go-live
- 7) Design and implementation of workflows (up to 4), **not to exceed 4 SALESmanago workflows**
- 8) Final go-live of above-mentioned System implementations - onboarding and implementation review
  - a) Status report
  - b) Roadmap development and next steps
  - c) Review ongoing services needs
- 9) Project summary meeting

### 1.3. SALESmanago - Premium services offering

Number of Service Units: **90 SU**

- 1) Complete discovery sessions to determine business requirements for the workflows, contact forms, dashboards and other functionalities for Customer's live of the System, including
  - a) Kickoff meeting
  - b) Discovery session
  - c) Scope, schedule & reporting planning meeting
- 2) Provide access to the project portal established for complete project management
- 3) Work with Customer to fully populate and utilise the environment
  - a) Configure the System environment
  - b) User set-up
  - c) Email marketing account set-up
  - d) Customization of emails according to brand theme
  - e) Initial setup of the System business dashboard
- 4) Data discovery and architecture workshop
  - a) Work with the Customer to document the necessary attributes for the System contact and event data
  - b) Mentoring and documentation for maintaining all data imports and upload processes, and the ongoing integration of data
  - c) User Acceptance Testing (UAT) criteria
- 5) Transactional data mapping and transfer

**Unless agreed upon in writing, if data is not ready or available for integration with SALESmanago prior to the Implement phase of the engagement (typically, Week 3), this shall be excluded from project scope.**

- a) XML file integration
- b) DKIM (DomainKeys Identified Mail) and SPF (Sender Policy Framework)

- c) Historical transaction migration (up to and not exceeding 500,000 events)
- 6) Contact data integration
  - a) Initial load of contacts to the System
  - b) Pre-import data aggregation
  - c) Initial segmentation of contacts
- 7) Complete the training and enablement sessions and provide the Customers with:
  - a) Live Q&A sessions to address specific use cases and challenges
  - b) Providing documentation and self-paced learning resources for users to get familiar with the System
- 8) Design and implementation of workflows (up to 5), **not to exceed 5 System workflows**
- 9) Up to three (3) preparation meetings with new Customer System operational and technical stakeholder to prepare for the go-live
- 10) Final go-live of above-mentioned System implementations - onboarding and implementation review
  - a) Status report
  - b) Roadmap development and next steps
  - c) Review ongoing services needs
- 11) Project summary meeting

The list of services available within SU is shown below:

#### **Basic use cases**

##### ***[Use Case matrix: Audiences]***

Use Case	Starter	Pro	Ultimate	Service Unit (SU) cost
Unify Customer data from multiple sources	+	+	+	6
Segment Contacts based on their personal data	+	+	+	3.5
Gather declarative data and customer preferences		+	+	5
Increase efficiency of Google Ads		+	+	1.5
Prioritize high-value customers using RFM segments		+	+	3.5
Analyze website visitors		+	+	2
Maximize ROI from Meta and TikTok ads			+	1.5
Use Loyalty Program to increase customer retention			+	11
Create real-time dynamic segmentation			+	1.5

##### ***[Use Case matrix: Website Experience]***

Use Case	Starter	Pro	Ultimate	Service Unit (SU) cost
Acquire new leads and subscribers on your website	+	+	+	4.5
Display targeted pop-ups and landing pages	+	+	+	5.5

Build and analyze recommendation frames for your website		+	+	3
Engage with your customers in real-time through Live Chat		+	+	2.5
Drive purchases with Social Proof		+	+	0.5
Show personalized offers using banners on your website		+	+	0.5
Display real-time notifications directly on your website			+	3
Personalize website visitor experience with automations			+	2
Tailor user experience with custom scripts			+	6

**[Use Case matrix: Channels]**

Use Case	Starter	Pro	Ultimate	Service Unit (SU) cost
Send engaging email campaigns	+	+	+	2
Optimize email templates with A/B testing	+	+	+	3
Engage users via SMS channel		+	+	3
Reach your audience with Web Push notifications		+	+	3
Create urgency with countdown timers		+	+	1.5
Engage customers with birthday and recurring emails		+	+	3
Connect with your audience through messaging apps			+	1.5
Engage users with targeted push notifications in your mobile app			+	4
Use the latest technology trends in email channel			+	3

**[Use Case matrix: Recommendations]**

Use Case	Starter	Pro	Ultimate	Service Unit (SU) cost
Recover abandoned carts	+	+	+	4.5
Use recently viewed product recommendations	+	+	+	4.5
Increase sales and drive urgency with price drop notifications		+	+	2
Capture missed opportunities with back-in-stock campaigns		+	+	2
Create sophisticated recommendation scenarios		+	+	4
Engage visitors with an easy-to-setup wishlist		+	+	2
Improve shopping experience with AI-driven recommendations			+	4
Tailor your product recommendations with custom scripting			+	6
Customize recommendations with most advanced products filters			+	4

---

**Estimated costs of the individual activities of the Onboarding Services**

Implementation Components	Service Units (SU)	Scope of Implementation
Database Import	1	One CSV file
Historical transactions Import	5	One CSV file with up to 500 000 external events
Scoring Rules Creation	0.5	Setting up 8 default scoring rules
Ad-hoc Rule Creation	0.5	Two ad-hoc rules with a maximum of 10 elements each
Funnel and Automation Processes Creation	1.5	One funnel with up to 4 stages and automation processes moving contacts between stages
Segmentation Center Setup	1	Up to 5 segments
Pop-up / Form / Landing Page Creation	1.5	One creation from Custom Modal Designer / Advanced Form Creator / Landing Page Creator
Confirmation Email Creation	1	One Confirmation Email from Email Designer Studio (EDS)
Welcome Email Process Creation	0.5	One single channel workflow
Welcome Email Template Creation	1	One email template from EDS
Importing Discount Coupons	0.5	One CSV file
Graphic Pop-up / Exit Pop-up creation	1	One creation from Custom Modal Designer / Graphic Pop-up Designer
Sender's Account Creation	0.5	One sender's account creation and confirmation
Newsletter Template Creation and Sendout	1.5	One email template from EDS sent to the defined segment
AB test Email Templates Preparation	2.5	Two email templates from EDS with minor differences for A/B testing
AB test Sendout Process	0.5	One AB test
Email Template with Basic Dynamic Scenario Creation	2	One email template from EDS with one recommendation frame with basic dynamic scenario
Abandoned Cart Workflow Setup	0.5	One single channel workflow
Email Template with Custom Discount Coupon	1	One email template from EDS with discount coupon
Abandoned Cart Reminder Workflow Setup	0.5	One single channel workflow
Last Viewed Products Workflow Setup	0.5	One single channel workflow
Customer Preference Center Setup	2.5	One Customer Preference Setup
Customer Preference Center Verification Email Creation	1	One Email from Email Designer Studio (EDS)
Customer Preference Center Email Campaign - Email Creation and Sendout	1.5	One Email from Email Designer Studio (EDS)
Static Custom Audiences Creation	0.5	4 Static Custom Audiences with up to 6 conditions each
Dynamic Audiences Creation	1	4 Automation Process with up to 10 elements each
RFM Panel Setup	0.5	One RFM panel
Email Template for Premium Customers and Automation Process responsible for it's sendout	1.5	One Email from Email Designer Studio (EDS) and one Automation Process

Email Template for Lost Premium Customers and Automation Process responsible for it's sendout	1.5	One single channel workflow
Segmentation Matrix Creation	0.5	Two segmentation matrices with a maximum of 10 elements each
Interest Levels Funnel and Automation Processes Creation	1.5	One funnel with up to 4 stages and automation processes moving contacts between stages
Creation of Recommendation Frame with Basic Scenario (Last Viewed, Abandon Cart, Static Products)	1	One Recommendation Frame
Live Chat Consultants Creation	0.5	Up to 10 Consultants Profiles
Live Chat Creation (with contact form) and Implementation	1.5	One Live Chat
Shortcuts Library Creation	1	Library with up to 25 shortcuts
Social Proof Creation and Implementation	0.5	One Social Proof
Dynamic Banner Setup	0.5	One dynamic banner
Phone numbers manual Import	0.5	One CSV file
Lead Generation elements edit	1	Up to 2 Lead Generation elements edit (to include field for phone numbers collection)
SMS templates creation	0.5	Up to 3 SMS templates
SMS sendout	0.5	Up to 3 SMS mass sendouts
Enriching automation process with SMS communication	0.5	Up to 2 Automation Processes edit (to include SMS as Communication Channel)
Web Push Consent Form Creation and Implementation	0.5	One Consent Form
Mass Web Push Creation and Sendout	1	Up to 3 Web Push Templates creation and sendout
Dynamic Web Push Templates Creation	0.5	Up to 3 dynamic Web Push Templates Creation
Enriching automation process with Web Push communication	0.5	Up to 2 Automation Processes edit (to include Web Push as Communication Channel)
Lead Generation Web Push creation and sendout	0.5	One Web Push creation and sendout
Newsletter Template with Countdown Timer Creation and Sendout	1.5	One Email from Email Designer Studio (EDS)
Birthday Email Template preparation and sendout process setup	1.5	One Email from Email Designer Studio (EDS)
Recurring Email Template preparation and sendout process setup	1.5	One Email from Email Designer Studio (EDS)
Dynamic Email Template with price-drop products	1	One Email from Email Designer Studio (EDS)
Multichannel price-drop automation process implementation	0.5	One multichannel workflow with max. 10 elements
Web push/SMS/Custom Audience creation for price-drop process	0.5	One web push/SMS/custom audience
Dynamic Email Template with back-in-stock products	1	One Email from Email Designer Studio (EDS)
Multichannel back-in-stock automation process implementation	0.5	One multichannel workflow with max. 10 elements
Web push/SMS/Custom Audience creation for back-in-stock	0.5	One web push/SMS/custom audience
Personal Shopping Inbox Creation (Notifications Tab)	1	One Personal Shopping Inbox including Notifications Tab

Preparation and scheduling of PSI notifications	1	Up to 5 PSI Notifications
Webflow preparation	0.5	Up to 2 Webflows
Web push to be used in webflow preparation	0.5	Up to 3 Web Push Templates Creation
Newsletter Template with Countdown Timer Creation and Sendout	1.5	One Email from Email Designer Studio (EDS)
Birthday Email Template preparation and sendout process setup	1.5	One Email from Email Designer Studio (EDS)
Recurring Email Template preparation and sendout process setup	1.5	One Email from Email Designer Studio (EDS)
Dynamic Email Template with price-drop products	1	One Email from Email Designer Studio (EDS)
Multichannel price-drop automation process implementation	0.5	One multichannel workflow with max. 10 elements
Web push/SMS/Custom Audience creation for price-drop process	0.5	One web push/SMS/custom audience
Dynamic Email Template with back-in-stock products	1	One Email from Email Designer Studio (EDS)
Multichannel back-in-stock automation process implementation	0.5	One multichannel workflow with max. 10 elements
Web push/SMS/Custom Audience creation for back-in-stock	0.5	One web push/SMS/custom audience