Red Pepper Software

Red Pepper Software Statement of Work

Red Pepper Software, LLC	**Customer**
By (signature):	By (signature):
Name:	Name:
Title:	Title:
Date:	Date:
Red Pepper Primary Contact:	**Customer Primary Contact:**
Name:	Name:
Email:	Email

Parties:	Red Pepper Software, LLC ("**Delivery Team**")		
	("**Customer**")		
Effective Date:	Date of last signature hereto.		
Services:	As set forth in the attachment below.		
Term:	As set forth in the attachment below.		
Payment Terms:			
Additional Terms:	**Net 30** days following invoice		
Purchase Order Required?			
Email Address for Invoice Submission:			
Invoicing Instructions (if applicable):			
		PO number (if required):	
		Billing Address for Invoice Submission:	[________________________] Attn: [______________________] [________________________] [________________________]

Standalone
This Red Pepper Software Statement of Work (**"SOW"**) is between **Red Pepper Software, LLC ("Delivery Team")** and ____________________________ **("Customer")** for purposes of a custom project **("Project")** whose Scope and Objectives are specified below. RPS and Customer are sometimes referred to herein individually as a "**Party**," and collectively the "**Parties**." Qualtrics has developed a series of proprietary computer software programs that facilitate and automate the process of conducting surveys, polls, intercepts, and reports (the "**Software**"). Qualtrics provides its clients access to the Software as end users via an application service provider (ASP) model, in which Qualtrics uses, operates, and makes available the applicable software, network, systems, and other technologies in order to provide the Services (as defined below) to clients via the Internet and a web browser. For all purposes of this SOW, the term "Services" shall mean and refer to the specific version(s) of the Qualtrics survey, poll, reviews, intercept, and reporting service(s) specified herein and accessible at www.Qualtrics.com, another designated website, and/or ancillary products provided by Qualtrics. **Data Ownership:** Customer owns all right, title and interest in and to any responses, reports, personally identifiable information, and/or other information input or generated by or on behalf of Customer in connection with the Services (the "**Data**"). Customer shall have sole responsibility for the accuracy, quality, integrity, legality, reliability, appropriateness, and intellectual property ownership or right to utilize the Data. Notwithstanding the foregoing, for all purposes of this SOW, the Data shall be deemed to be Customer's Confidential Information and will not be utilized by RPS for any purpose other than performing its obligations under this SOW or as may otherwise be agreed to in writing by the Parties. **Confidentiality** *Non-Disclosure.* Delivery Team agrees that during the term of this Agreement and thereafter, except as expressly authorized in writing by Customer, it (a) will not use or permit the use of Confidential Information (defined below) in any manner or for any purpose not expressly set forth in this Agreement; (b) will not disclose, lecture upon, publish, or permit others to disclose, lecture upon, or publish any such Confidential Information to any third party without first obtaining Customer's express written consent on a case-by-case basis; (c) will limit access to Confidential Information to Delivery Team personnel who need to know such information in connection with their work for Customer; and (d) will not remove any tangible embodiment of any Confidential Information from Customer's premises without Customer's prior written consent. "Confidential Information" includes, but is not limited to, all information related to Customer's business and its actual or anticipated research and development, including without limitation (i) trade secrets, inventions, ideas, processes, computer source and object code, formulae, data, programs, other works of authorship, know-how, improvements, discoveries, developments, designs, and techniques; (ii) information regarding products or plans for research and development, marketing and business plans, budgets, financial statements, contracts, prices, suppliers, and customers; (iii) information regarding the skills and compensation of Customer's employees, contractors, and any other service providers; (iv) the existence of any business discussions, negotiations, or agreements between Customer and any third party; and (v) all such information related to any third party that is disclosed to Customer or to Delivery Team during the course of Customer's business ("Third Party Information"). Notwithstanding the foregoing, it is understood that Delivery Team is free to use information that is generally known in the public, trade, or industry; information that is not gained as a result of a breach of this Agreement; and Delivery Team's own skill, knowledge, know-how, and experience. **Logo and Likeness:** Delivery Team retains the limited license to use the logo and likeness of Customer in marketing and informational pieces. **Limitation of Liability.** EXCEPT AS EXPRESSLY PROVIDED HEREIN, IN NO EVENT SHALL EITHER PARTY BE LIABLE TO THE OTHER OR TO ANY THIRD PARTY FOR ANY INDIRECT, PUNITIVE, SPECIAL, EXEMPLARY, INCIDENTAL, CONSEQUENTIAL, OR OTHER DAMAGES OF ANY TYPE OR KIND (INCLUDING LOSS OF DATA, REVENUE, PROFITS, USE, OR OTHER ECONOMIC ADVANTAGE) ARISING OUT OF, OR IN ANY WAY CONNECTED WITH THE SOFTWARE, SERVICES, OR THIS SOW, INCLUDING, WITHOUT LIMITATION, THE USE OR INABILITY TO USE THE SERVICES, OR FOR ANY CONTENT OBTAINED FROM OR THROUGH THE SERVICES, ANY INTERRUPTION, INACCURACY, ERRORS, OR OMISSIONS, EVEN IF A PARTY HAS BEEN

SPECIFICALLY ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT SHALL EITHER PARTY'S TOTAL AGGREGATE LIABILITY HEREUNDER EXCEED THE AMOUNTS ACTUALLY PAID BY CUSTOMER TO RPS IN THE COURSE OF COMPLETION OF THE PROJECT.

Termination for cause. This SOW shall automatically terminate without any further obligation and without liability of either party upon the occurrence of the following: (a) either party commits a material breach of this agreement which such Party fails to cure within thirty (30) days after receipt of written notice outlining such material breach from the other Party; or (b) either party becomes insolvent, acknowledges insolvency in any manner, ceases to do business, makes an assignment for the benefit of its creditors, or files a petition in bankruptcy.

Upon termination for cause the breaching party shall pay all reasonable and remaining undisputed fees (if any) resulting from the termination.

Cancellation for Convenience. Contract may not be canceled once fully executed if implementation has begun. If canceling prior to kickoff, cancellation for convenience will incur a 30% cancellation fee.

Holding or Delaying Project

The day of the Kickoff Call will be considered the official Project Start Date. The Project calendar will run continuously. If the Customer wishes to put the Project on "Hold" a documented request must be made and confirmed by the Delivery Team. Projects may be placed on hold one (1) time, for up to three (3) weeks. Additional hold time or Project calendar extensions may be available at $500 per week. Delivery Team will notify the Customer in advance if this fee is likely to accrue for delays or calendar extensions.

If the Customer wishes to delay the start of the Project, a documented request must be made and confirmed by the Delivery Team. Start delays in excess of 90-days may require an agreement addendum.

1. **Definitions**
    a. "Deliverables" refers to those implementation deliverables included in the Project Scope in Section 2.
    b. "Delivery Team" refers to the set of resources assigned by Red Pepper Software for fulfillment of project scope.
    c. "Project" refers to the project that is the cumulation of Deliverables to be provided under this Professional Services Exhibit.
    d. "Standard Business Hours" are 0900 to 1700 hours according to the time zone of the office in which Delivery Team is located (Mountain), unless otherwise agreed to in writing during the Project.

2. **Project Scope**
    a. Inclusions
        i. **Standard CX Foundation Use Case** including the following deliverables
            1. The deliverable descriptions are outlined in Schedule 1. Please note that **only the Deliverables listed immediately below are included in this Project**. Each line item represents a Deliverable and quantity
                a. CRM Integration Support (1)
                b. Dashboard Configuration (1)
                    i. (Max 5 pages, 20 widgets/survey, max 60 widgets total, max 3 roles, 1 source)
                c. Survey Configuration (1)
                d. XM Directory Support (1)
                e. Closed Loop Follow-Up Configuration (1)
                f. API Introductory Support (1)
                g. Text iQ Configuration (1)
                h. Website Feedback Support (1)
    b. Exclusions
        i. Anything not listed above is excluded from scope of the Project.
        ii. No customizations will be provided by the Delivery Team.
        iii. Year 2 Services are excluded from the scope of the Project. Qualtrics strongly recommends that the Customer purchases ongoing services for Year 2 that will help drive continual program success and improvements in XM competency. Customer should reach out to the Delivery Team to discuss options.

    c. Assumptions
        i. For the duration of the Project, Customer will provide the Delivery Team with access to Customer's Qualtrics brand (account) as a brand administrator.
        ii. Delivery Team and Customer will mutually agree to the list of specific browsers that should be tested as per Project requirements. Qualtrics' standard browser compatibility policy is specified in the "Browser Compatibility & Cookies" section of the Qualtrics support pages: (https://www.qualtrics.com/support/survey-platform/getting-started/browser-cookies/).

3. **Responsibilities**
    a. Delivery Team Responsibilities
        i. Engages with Customer throughout the Project, keeping the Customer informed of timelines and progress toward completion throughout the Project.
        ii. Shares training resources as appropriate for each Deliverable, which may be in the form of documentation, live online training, online materials, and/or free online webinars.
        iii. Offers guidance and support required to ensure Customer can fulfill the responsibilities listed in Schedule 1 for each Deliverable.
        iv. For projects that involve a new license setup, provides initial configuration of license and Qualtrics account, including creation of up to 3 brand administrator users.
        v. The purpose of the Project is to train Customer to be able to manage the program when the Project is complete. As such, the Delivery Team does not perform full setup and configuration of Qualtrics as a full-service implementation. Please see Schedule 1 for a list of Delivery Team and Customer responsibilities.
    b. Customer Responsibilities
        i. Engages actively throughout the Project, following a cadence decided with Delivery Team during kickoff call; changes or cancellations of any meetings require 24 hours' notice in order to avoid forfeiture of allotted time.
        ii. Manages User Acceptance Testing ("**UAT**") process and any special testing requirements, ensuring that each stage of the Project is complete and the scope of work has been met. This may include:

1. Uploading sample data to the Qualtrics platform to test system functionality and license settings.
2. Validating that scoped features and settings were implemented correctly and meet the requirements of the Project.
3. Engaging other stakeholders within Customer's organization as needed to test technical or functional aspects of the Qualtrics platform.

iii. As needed, provides resources to fill all required roles for successful implementation, which may include project sponsorship, signatory, stakeholder management, project coordination, customer experience lead, technical lead, operational support.

iv. Maintains all features included in the license after the implementation period, including any updates to Deliverables created during the Project, as well as the creation of any new Deliverables, including surveys and dashboards.

v. For projects that involve a new license setup, provides required information for setup of brand administrator accounts; brand administrator users may create additional user accounts and manage access to the license, in accordance with any limitations specified in the license terms.

4. Governance

a. Delivery Team will coordinate with Customer to schedule a Project kickoff call, at which time the Project begins. Timing of kickoff call will be mutually agreed between Delivery Team and Customer based on Delivery Team availability and Customer's milestones. It is estimated that the Project will begin within two (2) weeks after the Effective Date of this Service Order, subject to the Delivery Team's queue. The Project duration will last for up to eight (8) weeks. If additional weeks are needed those cost $500 p/week.

b. The Project is complete based on completion of delivery and Customer's acceptance, per the terms of the Acceptance Criteria section.

c. Unless otherwise agreed by both parties in writing, all interactions and meetings will be conducted in English, and will be conducted remotely, via phone, email, or video conference.

5. Acceptance Criteria

a. Once a Project phase is completed and the Delivery Team provides notification of the Deliverables for review and approval, the Customer will either (1) confirm the requirements have reasonably been met and sign off on the approval for the next implementation phase to begin or (2) reply to the Delivery Team, in writing, detailing the specific requirements that must still be met. Upon mutual agreement, both parties may agree to extend the time period for UAT, though additional time may impact Project timelines and budget and be subject to a Change Order (as defined below).

b. Deliverables are reviewed and signed off according to the following process:

i. Delivery Team will submit final drafts for review and sign-off at least 5 business days prior to the Deliverable completion date.

ii. Customer will sign off or report any issues within 5 business days of draft submission.

iii. The Delivery Team will correct reported issues within a mutually agreed time frame.

iv. Customer will provide written feedback and raise issues related to the reworked portion of the Deliverable within a mutually agreed time frame, and the Delivery Team will make changes necessary to resolve the issues.

v. Customer will provide final review and signoff on the reworked Deliverables within 2 business days.

vi. Deliverables will be considered accepted if the Customer does not provide written notification of Deliverable rejection within the timelines specified above.

6. Third Party Vendors and Products

a. Customer remains responsible for their own vendors and third parties providing services related hereto.

b. Delivery Team is not responsible for third party products obtained by Customer.

7. Change Orders

a. If Customer or Delivery Team wishes to change the scope of the Project, they will submit details of the requested change to the other in writing. Delivery Team will, within a reasonable time after such request is received, provide a written estimate to Customer of changes to Project cost, timeline, and/or scope.

b. Promptly after receipt of the written estimate, Customer and Delivery Team will negotiate and agree in writing on the terms of such change (a "Change Order"). Each Change Order complying with this Section will be considered an amendment to this Service Order.

8. Payments and Fees

Item(s)	Invoice Date	Price (USD)
CX Use Case Foundation Standard Implementation with Digital Lite	Date Signed	$6,750
	Total:	$6,750

Schedule 1: Implementation Deliverable Description Glossary

This outlines all Deliverables that *may* be included in a Qualtrics Implementation, along with associated Delivery Team and Customer responsibilities. **Deliverables listed below may not be included in the specific Project referenced in the above Service Order. <u>For a list of specific Deliverables included in this Project, refer to Section 2: Project Scope above.</u>**

Unless otherwise noted, all Deliverables will be configured using standard features available in the Qualtrics platform; custom features can be scoped and purchased separately through Qualtrics Engineering Services. For all Deliverables, Customer is responsible for any setup or configuration beyond what the Delivery Team provides as part of the Project, including additional surveys or dashboards, and any required translations for surveys, dashboards, reports, Website Feedback creatives, or any other features of the Qualtrics platform. **Customer will maintain all aspects of the Deliverables after completion of the Project.**

Deliverable + Description	Associated Responsibilities
Action Planning Configuration *The Action Planning module enables creation and management of action plans based on specific types of customer feedback. These action plans make it easier to address customer feedback and tackle the root causes of customer complaints.*	**Delivery Team Responsibilities** Configure one (1) Action Planning dashboard page, including one (1) Action Planning widget Configure one (1) dashboard with up to ten (10) widgets to enable reporting of Action Planning data. The widget(s) will be based on the Action Planning data set only. **Customer Responsibilities** Identify and configure specific fields within the Action Planning module.
Adobe Analytics Integration Support *Adobe Analytics integration allows survey responses to be passed back to Adobe Analytics. If using the Qualtrics Website Feedback functionality, Adobe Analytics variables from the website may be passed to Qualtrics as embedded data within a survey.*	**Delivery Team Responsibilities** Provide support to ensure Customer can fulfill responsibilities outlined below. **Customer Responsibilities** Identify Adobe Analytics variables to use in intercept logic, as well as website and Adobe Analytics variables to pass to a survey response. Create embedded data fields in the Qualtrics platform using Website Feedback to populate within Adobe Analytics. Configure the integration to enable sending survey responses to Adobe Analytics. ***Note:*** *Any questions about Adobe reports will be handled through Adobe Support.*
API Advanced Support *The Qualtrics REST API allows querying of the Qualtrics platform using common URL syntax. Advanced support includes more consulting time than introductory support.* *<u>Must be purchased with API introductory support.</u>*	**Delivery Team Responsibilities** Provide up to five (5) one-hour sessions including an overview of executing web service calls from the qualtrics platform using a web service task, and capabilities included in the website feedback in-app software development kit (SDK). Provide up to five (5) hours of API consulting, available during the implementation period, which can be used for support via conference calls or email. **Customer Responsibilities** Assign one or more developer (but no more than ten) with experience programming using RESTful API endpoints to Project tasks. Configure requests using DELETE, PUT, GET or POST requests. Own setup, maintenance, and troubleshooting of any integrations built using the Qualtrics REST API.
API Introductory Support *The Qualtrics REST API allows querying of the Qualtrics platform using common URL syntax.*	**Delivery Team Responsibilities** Provide Customer with available API documentation and provide guidance on API access. Provide up to two (2) one-hour sessions including an overview of Qualtrics system modules and common use cases in API usage. Provide up to two (2) hours of API consulting, available during the implementation period, which can be used for support via conference calls or email. **Customer Responsibilities** Ensure at least one (max of 10) developer familiar with the use of REST to access API endpoints is engaged in implementation Project. Configure requests using DELETE, PUT, GET or POST requests. Own setup, maintenance, and troubleshooting of any integrations built using the Qualtrics REST API.
Chat & Comms Integration Support *Slack integration allows you to automate notifications based on*	**Delivery Team Responsibilities** Advise on best practices for setting up a Slack survey in one of two ways, to be decided by Customer: Notify a channel when a survey has been answered based on predefined conditions. Send a one-question survey to a public Slack Channel.

survey feedback, or share a single-question survey within a public Slack channel.	**Customer Responsibilities** Download Qualtrics app and allow access to the Slack account. Configure a survey within the Qualtrics platform for integration with Slack. Determine which Slack survey setup is most appropriate, choosing from the two options provided above. Based on the survey setup chosen, either define the conditions for triggering slack notifications and provide message text for the integration, or add the custom survey to the desired Slack channel.
Closed Loop Follow-Up Configuration *Ticketing is a way to assign ownership of a task to an individual or role to enable quick action based on customer survey responses. Tickets can be managed within the Qualtrics platform through the follow-up page, and dashboards can be used to track relevant metrics.*	**Delivery Team Responsibilities** Configure logic and field sets for up to five (5) Tickets tasks. Create one (1) dashboard to enable reporting of ticketing-related metrics that can be gathered using standard ticketing functionality. **Customer Responsibilities** Define and configure logic behind ticket task creation and routing. If dynamic ticket assignment is desired, ensure the username of assignees are included as an Embedded Data field in each survey response. (Manual ticket assignment may be used as an alternative).
CRM Integration Support *The Customer Relationship Management ("CRM") integration enables data sharing and workflow integration between Customer's CRM and Qualtrics. Details around CRM-specific capabilities are available on Qualtrics' website support pages.*	**Delivery Team Responsibilities** Ensure permissions are enabled for CRM integration. Provide demonstration on the use of the CRM integration capability, which may include the following based on the CRM being integrated with: - Using workflow rules in CRM to trigger Qualtrics surveys. - Mapping survey responses into a CRM object, for access and reporting within CRM. **Customer Responsibilities** Ensure at least one (max of 10) CRM administrator(s) responsible for Customer's CRM environment is engaged in implementation Project. Ensure full access to a CRM account. Program surveys within Qualtrics platform to be used with CRM integration. Set up and implement all relevant CRM workflow rules required as part of this integration. Ensure availability of all required custom objects within CRM (e.g., survey record). As applicable, verify that Qualtrics survey data appears successfully within CRM environment. *Note: Qualtrics will not access Customer CRM environment as part of this Project. Customer must own and have full access to a CRM account.*
Custom Training/Demo - per hour *Training or Demo sessions can be given to any group within an organization to ensure familiarity with the product. Each session can last up to one hour and will be conducted by the Delivery Team or another Qualtrics product expert.*	**Delivery Team Responsibilities** Provide a one hour training session where the Customer will learn how the Solution is set up and how to manage it going forward. Delivery Team will allow for adequate Q&A during the training. These trainings can be recorded upon request from the Customer. **Customer Responsibilities** Arrange for the training/demo session with the Delivery Team and any attendees on the Customer side. Inform Delivery Team ahead of the scheduled training/demo if recordings are required. If cancellation is required, provide at least 24 hours' notice to the Delivery Team, or risk forfeiture of the allotted training/demo time.
Customer Service Integration Support *The Customer Service Integration feature enables the creation or updating of tickets within Customer's incident management application. Details around incident management-specific capabilities are available on Qualtrics' website support pages.* *Supported Customer Service Platforms are:* *Freshdesk* *JIRA* *ServiceNow* *Zendesk*	**Delivery Team Responsibilities** Support for integration for one (1) supported Customer Service system. Ensure permissions are enabled for incident management system integration. Provide demonstration on the use of the incident management integration capability, which may include the following based on the incident management system being integrated with: • Using criteria within a Qualtrics survey to create or update a ticket within the incident management system. • Reviewing available incident management ticket fields (e.g., Assignee ID, Priority, Status) that can be set as part of the Customer Service Integration feature. **Customer Responsibilities** Ensure at least one (max of 10) incident management system administrator responsible for Customer's incident management system environment is engaged in the implementation Project. Ensure full access to an incident management system account. Program surveys within Qualtrics platform to be used with incident management system integration. Set up and implement all relevant incident management system workflow rules required as part of this integration.

	Ensure availability of all required custom objects within the incident management system (e.g., survey record). As applicable, verify that Qualtrics survey data appears successfully within the incident management system environment. *Note: Qualtrics will not access Customer incident management system environment as part of this Project. The Customer must own and have full access to an incident management system account.*
Dashboard Configuration *Dashboards can be used to share the results of ongoing research programs by mapping one or more data sources into dynamic visualizations called widgets. Widgets dynamically present data in graphs, pictures, and tables. Dashboard pages can be used to group widgets in impactful ways. Both pages and widgets can be filtered, edited, and shared with restrictions based on audience needs and security levels.*	**Delivery Team Responsibilities** Design and program all survey(s) that are to be mapped to dashboards. Conduct a scoping and design call with Customer upon commencement of license to agree upon dashboard content and layout. Configure one (1) dashboard with up to three (3) pages, including up to twenty (20) widgets per page, after the surveys have been programmed by Customer. Connect the dashboard to one or all of the surveys purchased as part of this Project. Map up to twenty (20) survey questions and up to thirty (30) embedded data fields per survey to the dashboard. Configure up to three (3) user roles; grant role-based access to the dashboard, including access to specific pages and responses, as defined by Customer. Create needed user accounts, either manually or via batch upload, and ensure that any users who require data restrictions or role-based access have appropriate attributes saved in the Qualtrics platform. **Customer Responsibilities** Determine key metrics to be used in the dashboard. Define and share with Delivery Team specific role-based access requirements for dashboard, specific pages, and responses.
Data Isolation Setup *All Qualtrics data and brands are protected with the utmost care. However, for those who wish to have more control over security settings, Data Isolation allows Brand Administrators a wide range of customization options, including user login tracking, additional password requirements, lockout settings based on failed login attempts, and much more.*	**Delivery Team Responsibilities** Configure Customer's Qualtrics license to support this security feature. Validate that advanced security features have been successfully implemented.
Frontline Feedback Support *Frontline Feedback is used to collect, organize, and prioritize suggestions from users in your Qualtrics license. Each feedback request contains a set of attributes with important information about the request. Users may interact with the feedback request by commenting, voting, and categorizing feedback requests. You can prioritize requests through sorting, filtering, and searching capabilities as well as view feedback in aggregate through the use of dashboards.*	**Delivery Team Responsibilities** Conduct one (1) custom training for the feedback moderator, and up to one (1) end user stakeholder session for the Frontline Feedback feature. Configure one (1) Frontline Feedback Project, including sharing permissions, notifications, custom statuses and one (1) dashboard page to view the collected feedback. **Customer Responsibilities** Performs responsibilities necessary for the Project and as outlined in this Statement of Work.
Marketo Integration Support *Marketo integration allows you to generate links in Qualtrics and assign them to leads from a static list in Marketo. Each generated link is immediately stored in a Marketo Lead Field, and a token may be inserted into a Marketo email campaign to assign personalized survey links to each unique lead.*	**Delivery Team Responsibilities** Provide support to ensure Customer can fulfill responsibilities outlined below. **Customer Responsibilities** Create the API-only user, create a new service, and enter Marketo IDs into Qualtrics. Generate links and distribute them to contact lists as appropriate.

Native Application Feedback Support *Website / App Feedback projects are a great way to reach out to your website visitors. You can create professional and beautiful graphics that appear in special conditions to advertise something or to request feedback. You can also customize when you want to approach visitors.*	**Delivery Team Responsibilities** Support Customer in configuration of application intercept (1) purchased as part of this Project. Advise Customer in obtaining code from the Qualtrics platform for use in application feedback intercepts. Review configured application intercepts to verify best practices are followed and intercepts are ready for production. **Customer Responsibilities** Configure the application intercepts to be used for sourcing survey participants. Build Website Feedback surveys using the Qualtrics Platform. Deploy and maintain Website Feedback code on applicable Customer-owned domains.
Offline App Setup	**Delivery Team Responsibilities** **Ensure Customer's account is enabled for Offline App access.** **Set up one of the surveys included in this project for Offline App access.**
Org Hierarchy and User Setup - up to 1000 users *Org Hierarchy and User Setup eliminates the need to manually create user accounts for existing user groups by uploading in batches. User accounts are created with appropriate roles and attributes as defined by the Customer.*	**Delivery Team Responsibilities** Upload batch files of users with associated role/attributes. **Customer Responsibilities** Provide a list of users and associated roles/attributes in a standard file format specified by Delivery Team.
Predict iQ Support *PredictIQ uses survey responses and embedded data to predict whether individual respondents will eventually churn.*	**Delivery Team Responsibilities** Provide demonstration on the use of the Predict iQ capability, including the following: ● Creating a prediction model using a Churn embedded data value. ● Using the Churn Probability and Churn Prediction features of the Data Analysis tab. ● The use of actions to manage real-time churn alerts. ● How to use historical data to create a Churn model. Assist in the creation of one (1) Churn model in a single survey, and, if desired, configure one (1) trigger based on the Churn variable. **Customer Responsibilities** Import any historical data required as part of this Project. Create one (1) Churn variable within the Qualtrics platform. ***Note:*** *Predict iQ requires a minimum of 500 survey responses from customers that have churned in order to predict future Churn; 5,000 or more responses will provide best results. If this amount of data is not available during implementation, test data may be generated. Customer must understand prediction models and is responsible for deciding how Predict iQ will be configured.*
Salesforce Integration Support *Salesforce integration is an out-of-the-box integration that allows for surveys to be triggered and sent to recipients from Salesforce and information to be mapped from a survey back into Salesforce. Surveys can be triggered from Salesforce events and survey response data can be sent back to Salesforce.*	**Delivery Team Responsibilities** Ensure permissions are enabled for Salesforce integration. Provide demonstration on the use of the Salesforce integration capability, including the following (up to 3 one hour meetings): ● Using workflow rules in Salesforce to trigger Qualtrics surveys. ● Mapping survey responses into a Salesforce object, for access and reporting within Salesforce. **Customer Responsibilities** Ensure at least one (max of 10) Salesforce administrator(s) responsible for the Customer's Salesforce environment is engaged in implementation Project. Ensure full access to a Salesforce account. Program surveys within Qualtrics platform to be used with Salesforce integration. Set up and implement all Salesforce workflow rules required as part of this integration. Ensure availability of all required custom objects within Salesforce, eg. (Survey Record). Verify that Qualtrics survey data appears successfully within Salesforce environment. ***Note:*** *Qualtrics will not access Customer Salesforce environment as part of this Project. Customer must own and have full access to a Salesforce account.*
SSO Configuration *With Single Sign-On (SSO), users can log into the Qualtrics platform using their organization's internal login*	**Delivery Team Responsibilities** Provide documentation, specifications, and requirements for SSO set-up. Conduct Q&A session with Customer and Customer IT/SSO team to identify any potential roadblocks, including a non-standard SSO system. Configure a test brand to validate SSO setup.

system, providing a seamless user experience, and allowing simple attribution of responses. *SSO is configured using standard Qualtrics SSO capabilities. For an overview of supported SSO types and system requirements, see https://www.qualtrics.com/support/survey-platform/sp-administration/single-sign-on/.*	Provide configuration details for the test brand and a login URL for setup validation. Provide support in troubleshooting any errors that arise in the test instance. Test the SSO setup within a test brand before transferring to the live brand. After successful testing of the configuration, provide configuration details to the Customer for the live brand, then transfer the configuration to the live brand. **Customer Responsibilities** Provide key configuration details of the SSO system as requested by Qualtrics, depending on the type of SSO connection. If customer SSO can support it, ensure SSO is set up to pass any user attributes required for dashboard permissioning. Ensure that a user in the Customer's IdP can successfully login to the Qualtrics platform using their SSO credentials.
Stats iQ Describe/Relate Support *Stats iQ automatically runs statistical tests and visualizations then translates results into simple language that anyone can put into action.* *The Describe capability visualizes and summarizes a variable, enabling you to get a feel for how your data is structured, examine any issues with your data, and think up hypotheses to explore later.* *The Relate capability explores the relationships between variables. When you select two variables and Relate, Stats iQ will choose the appropriate statistical test based on the structure of the data, run that test, then translate the results into plain English.*	**Delivery Team Responsibilities** Provide support to ensure Customer can fulfill responsibilities outlined below. **Customer Responsibilities** Configure Stats iQ for the Describe and Relate capabilities, including selecting variables, relating topics, and running analyses.
Survey Configuration *Survey configuration ensures your survey is designed and configured according to best practices and your requirements.*	**Delivery Team Responsibilities** Build all required surveys and reports using the Qualtrics platform, with design and review input from Customer. Configure automated survey distribution through channel(s) supported by the platform (e.g. email, SMS, etc.). Perform testing through generating test responses, survey preview, or other appropriate in-platform means to validate the survey setup and flow. Develop, apply and maintain any custom code (e.g., CSS, JavaScript, HTML) applied to the survey (additional Engineering Services costs will apply for such support to be activated) **Customer Responsibilities** Complete up to two (2) survey reviews per survey with Delivery team against Customer's survey experience and reporting requirements. Validate that all responses are collected in the format expected before the first project is launched.
Survey Data Migration (One-Time; Up to 50,000 responses) *Survey Data Migration involves the managed import of suitably formatted legacy/third party survey (response) data into the Qualtrics platform.*	**Delivery Team Responsibilities** Guide the Customer in configuring up to one (1) target survey to contain legacy/third party survey data. Guide the Customer in formatting legacy/third party survey data in to the associated Qualtrics Import format. Guide the Customer in importing up to one (1) formatted legacy/third party survey data file into Qualtrics. Confirm the correct import of up to one (1) legacy/third party data file into Qualtrics. **Customer Responsibilities** Provide the legacy/third party survey data. Take guidance from the Delivery Team on the initial one (1) import file. Format and import any additional legacy/third party data beyond the initial one (1) file.
Survey Review *Survey review ensures your survey is designed according to best practices.*	**Delivery Team Responsibilities** Complete up to two (2) survey reviews per survey with Customer to ensure all logic, embedded data, survey options and instrumentation are implemented correctly for both survey experience and reporting requirements. Perform testing through generating test responses, survey preview, or other appropriate in-platform

	means to validate the survey setup and flow. **Customer Responsibilities** Build all required surveys and reports using the Qualtrics platform, with advice and support from Delivery Team. Develop, apply and maintain any custom code (e.g., CSS, JavaScript, HTML) applied to the survey. Manage survey distribution through channel(s) supported by the platform (e.g. email, SMS, etc.). Validate that all responses are collected in the format expected before the first project is launched.
Survey Translation Support - per language, per survey *Multiple languages can be added to a single survey within the Qualtrics platform, allowing localization of survey display language while maintaining all responses within a single dataset.*	**Delivery Team Responsibilities** Advise Customer on how to use the Qualtrics platform to load survey translations. Assist with troubleshooting as needed. **Customer Responsibilities** Load data to Qualtrics platform. Conduct all required translation of survey questions, messages, etc.
Tableau Integration Support *Tableau integration makes Qualtrics data available for use in Tableau dashboards. This integration enables you to view Qualtrics survey data alongside all other data included in your dashboards.*	**Delivery Team Responsibilities** Advise on the steps to connect Qualtrics with Tableau. **Customer Responsibilities** Ensure that the either current version of Tableau or any of the prior 2 updates are used for the integration. Configure all Tableau dashboards using survey response data from the Qualtrics platform. Verify that Qualtrics survey data appears successfully within the correct Tableau environment.
Theme Configuration *Dynamic themes allow you to send surveys that align with your brand. Themes are made up of a logo, primary color, and background image/color.*	**Delivery Team Responsibilities** Create survey theme for Customer, in accordance with any limitations specified in the license terms. **Customer Responsibilities** Submit theme logos, styles, and colors using the Qualtrics Theme Builder.
Text iQ Configuration *Text iQ enables search and categorization of textual responses into topics.* *The system automatically generates recommendations, and users can manually add topics using enhanced search functionality that includes stemming and spell check for expanded results.*	**Delivery Team Responsibilities** Merge topics from up to three (3) text questions into a dashboard for reporting purposes. Configure up to one (1) dashboard page, including up to ten (10) widgets, to visualize the results of the topic analysis. **Customer Responsibilities** Manually create topics as required for the Project. Determine topics to include in the analysis from manually-created or automatically recommended topics. ***Note:*** *The system will make best-effort recommendations for automatic topic creation, though Qualtrics recommends a minimum of 10,000 comments per field for best performance of automatic topic creation.*
Vanity URL Setup *Host your Qualtrics surveys, dashboards, and user accounts on a custom web address to ensure alignment with your company brand.*	**Delivery Team Responsibilities** Coordinate efforts of Customer IT team and Qualtrics Technical Operations team as required to set up the Vanity URL. Configure Vanity URL, including certificate registration and domain setup. ***Note:*** *Customer's first year license fee must be paid in full before work can commence on vanity URL setup. This is due to the fact that Qualtrics must purchase and register certificates for the vanity domain and make configuration changes with their Content Delivery Network (CDN).*
Website Feedback Support *Website / App Feedback projects are a great way to reach out to your website visitors. You can create professional and beautiful graphics that appear in special conditions to advertise something or to request feedback. You can also customize when you want to approach visitors.*	**Delivery Team Responsibilities** Support Customer in configuration of domain(s) and intercept(s) purchased as part of this Project. Advise Customer in obtaining code from the Qualtrics platform for use in Website Feedback intercepts. Review configured web intercepts to verify best practices are followed and intercepts are ready for production. **Customer Responsibilities** Configure the web intercepts to be used for sourcing survey participants. Build Website Feedback surveys using the Qualtrics Platform. Deploy and maintain Website Feedback code on applicable Customer-owned domains. Build creative elements of Website Feedback, including popovers, feedback tabs, side bars, etc. Configure Website Feedback intercepts, including the logic determining when to present creatives.
XM Guided Solution & Solution	**Delivery Team Responsibilities**

Playbook *XM Guided Solutions provide pre-configured surveys, expert-validated methods, and dashboards tailored to the Customer's CX Use Case..*	Provide Customer with access to use case specific guided solution consisting of pre-built Survey(s) and Dashboard. Provide Customer access to the use case specific solution playbook. Conduct a 1 hour meeting to review the solution playbook with Customer. Customer can choose to use the above described Dashboard Configuration and/or Survey Review Implementation Deliverables to support Customer specific configurations to the Survey and Dashboard projects provided as part of the XM Guided Solution. If Customer chooses not to do so, then no additional configuration support is provided for the XM solution.
XM Directory Automations Support *XM Directory Automations is a feature within XM Directory, where you can configure scheduled automations to import contacts from a file, and/or configure distributions to be sent to contacts in a mailing list. The file may be transferred via SFTP (either a customer-hosted SFTP account or a Qualtrics-hosted SFTP account) or the Qualtrics File Service (QFS). Note that there may be additional services costs for a Qualtrics-hosted SFTP Account.*	**Delivery Team Responsibilities** Provide consultation on setting up one (1) Contact Import Automation and/or one (1) Distribution Automation, including ● **One (1) Import file** ● **Automation message library setup** ● **File processing rules support** ● **Field mapping (Up to forty (40) fields) and row exclusions rules** ● **One (1) distribution logic set** ● **Frequency of distribution (hourly, daily, weekly)** Provide all documentation available related to XM Directory Automations. Assist Customer in testing automation configuration and troubleshooting for up to four (4) hours. Review configuration and verify best practices are followed. **Customer Responsibilities** Configuration and testing of additional Contact Import and Distribution Automations, if required. Configuration and testing of additional Distribution Logic sets, if required If Customer is using a Qualtrics-provided SFTP server, information required by Qualtrics Engineering such as IP Address range information will be provided to Qualtrics within one (1) week of the Project kickoff date. If the related IP Address/Range is not wholly owned and managed by Customer, the IP Address/Range may be subject to review and approval by the Qualtrics Security Operations team, which may result in additional delays to the project schedule. If Customer is using their own SFTP server, the credentials for this server will be provided to Qualtrics within one (1) week of the Project kickoff date. Provide an import file matching the following: ● **UTF-8 Encoding** ● **CSV delimited format** ● **Up to 10,000 records per file** ● **Plaintext or PGP-encrypted** ● **Has a header row with at least the following mandatory fields:** ○ **Field containing Contact Email Address** ○ **Field containing Contact First Name** ○ **Field containing Contact Last Name** Provide a sample of the file for upload/import on the Project kickoff date. Provide all requested technical information required promptly, including sample files, IP ranges for whitelisting if appropriate, library messages, and other information. Configuration of Qualtrics XM Directory (opt outs, deduplication, contact frequency, sampling logic, and quota management). Have Qualtrics API access enabled on Customer's Qualtrics license. Qualtrics API license is priced separately and not included in this Service Order. Have Qualtrics XM Directory Automations enabled on Customer's Qualtrics license. Qualtrics XM Directory Automations is priced separately and not included in this Service Order.
XM Directory Support *XM Directory is a contact management platform that allows you to create and update contact information in one central database and send surveys directly to mailing lists, decrease the number of duplicate contacts easily to prevent repeat uploads, and manage your global opt-outs from the directory. You can also limit the amount of*	**Delivery Team Responsibilities** Provide consultation on contact frequency, deduplication, sample upload, embedded data fields, and ideal license configuration. Review configuration and verify best practices are followed. See also **XM Directory Automations Support**. **Customer Responsibilities** Manage, clean, and upload a sample file and all panel files to Qualtrics platform. Create sample plans or weighting matrices as appropriate. Build integrations between Qualtrics platform and Customer databases as required for this Project.

times a respondent can be contacted by your brand to prevent response fatigue and improve the survey taking experience.	