Government Price Quotation

Qualtrics at Carahsoft

qualtrics XM

11493 SUNSET HILLS ROAD | RESTON, VIRGINIA 20190
PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
WWW.CARAHSOFT.COM | QUALTRICS@CARAHSOFT.COM

carahsoft.

TO: Edward Enriquez
Chief Financial Officer/City Treasurer
City of Riverside
3900 Main St
Fl 7
Riverside, CA 92501 USA

EMAIL: eenriquez@riversideca.gov

PHONE: (951) 826-5660

FROM: Michelle Gomez-Colon
Qualtrics at Carahsoft
11493 Sunset Hills Road
Reston, Virginia 20190

EMAIL: Michelle.Gomez-Colon@carahsoft.com

PHONE: (571) 662-3354 **FAX:** (703) 871-8505

TERMS:
Contract Number: 7-17-70-40-05
NASPO Master Contract Number: AR2472
Contract Term: 09/15/17 - 09/15/26
Shipping Point: FOB Destination
Credit Cards: VISA/MasterCard/AMEX
Remit To: Same as Above
Payment Terms: Net 45 (On Approved Credit)
Sales Tax May Apply

QUOTE NO:	49677852
QUOTE DATE:	08/28/2024
QUOTE EXPIRES:	09/27/2024
RFQ NO:	
SHIPPING:	ESD
TOTAL PRICE:	$73,523.93
TOTAL QUOTE:	$73,523.93

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE
		BASE YEAR				
1	5000246-AR2472	Customer Experience 5 Response Tier - 100000 - Responses, 1 Year Term - Upgrade/renewal only XM for People Teams Suite - Employees 2,730 Qualtrics, LLC - 5000246 Start Date: 10/01/2024 End Date: 09/30/2025		$54,761.05 COOP	1	$54,761.05
2	AR2472-QUA003-1762	Custom Implementation Expense Qualtrics Qualtrics, LLC - CUST-IMPL Start Date: 10/01/2024 End Date: 09/30/2025		$1,546.39 COOP	1	$1,546.39
3	AR2472-QUA003-1762	Custom Implementation Expense Red Pepper Qualtrics, LLC - CUST-IMPL Start Date: 10/01/2024 End Date: 09/30/2025		$17,216.49 COOP	1	$17,216.49
		BASE YEAR SUBTOTAL:				$73,523.93
		SUBTOTAL:				$73,523.93
			TOTAL PRICE:			**$73,523.93**
			TOTAL QUOTE:			**$73,523.93**

SUGGESTED OPTIONS

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE
		OPTION YEAR 1				
4	5000246-AR2472	Customer Experience 5 Response Tier - 100000 - Responses, 1 Year Term - Upgrade/renewal only XM for People Teams Suite - Employees 2,730 Qualtrics, LLC - 5000246 Start Date: 10/01/2025 End Date: 09/30/2026		$68,421.05 COOP	1	$68,421.05

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SUGGESTED OPTIONS

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE
		OPTION YEAR 1 SUBTOTAL:				$68,421.05
		OPTION YEAR 2				
5	5000246-AR2472	Customer Experience 5 Response Tier - 100000 - Responses, 1 Year Term - Upgrade/renewal only XM for People Teams Suite - Employees 2,730 Qualtrics, LLC - 5000246 Start Date: 10/01/2026 End Date: 09/30/2027		$68,421.05 COOP	1	$68,421.05
		OPTION YEAR 2 SUBTOTAL:				$68,421.05
		SUGGESTED OPTIONS SUBTOTAL:				$136,842.10

Qualtrics EULA: http://www.qualtrics.com/indirect-terms-of-service/

Prices shown do not include sales tax, GST, HST, VAT or other taxes that may apply. Applicable taxes will be presented on the invoice. Unless inserted as part of an order form, this quote does not constitute a contract and is based on current information about the project requirements. Timelines for associated projects may be provided in a separate order form. Unless inserted as part of an order form, actual costs may change once project requirements and timelines are finalized. Software total above does not include any additional services fees that may be applicable.

***** Please reference the contract vehicle, the Carahsoft Quote Number 49677852, and N45 payment terms on a resulting purchase order.**

***** By providing a PO, customer is hereby agreeing to the terms and conditions outlined within the order form below to include acceptance of a multi-year agreement.**
***** All invoices are due NET 45, Up Front. Invoices are not subject to acceptance of the services and are due upon receipt of a Carahsoft invoice.**
***** Customer's payment obligation for each contract year of the Agreement is conditioned upon the availability and appropriation of funds. If funds are not appropriated to support continuation of performance in a subsequent fiscal year period, Customer shall have the right to terminate the Agreement at the end of the then-current contract year with prior written notice to Qualtrics at least 30 days prior to the start of the next contract year (a "Non-Appropriation Termination"). In the event of a Non-Appropriation Termination, Customer will not be entitled to any refund of any prepaid fees and shall be responsible for payment of amounts incurred up to the date of such termination.**

Includes:
XM for People Teams Suite - Employees 2,730

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Order Form

Parties:	City of Riverside | CA 3900 Main St Fl 7 Riverside CA 92522 United States (“**Customer**”)	Carahsoft Technology Corp 11493 Sunset Hills Road, Suite 100 Reston, VA 20190 (“**Carahsoft**”)
Effective Date:	The date the order is processed.	
Governing Document:	This Order Form is subject to the Qualtrics Terms of Service at **http://www.qualtrics.com/indirect-terms-of-service/** (the “Agreement”). All capitalized terms used but not defined herein have the meanings given to them in the Agreement. If there is a conflict between the terms of the Agreement and this Order Form, *the contract vehicle will be first in order of precedence.*	
Attachments:	- Service Level Exhibit - Fees Exhibit - Cloud Service Exhibit	
Services:	As set forth in the exhibits attached hereto	
Term:	As set forth in the exhibits attached hereto	
Payment Terms:	As set forth in the exhibits attached hereto	
Additional Terms:		

Service Level Exhibit

Service Levels

1. **Availability**. Qualtrics will use commercially reasonable efforts to ensure that the Cloud Service will be available at all times, excluding when the Cloud Service is unavailable due to (a) required system maintenance as determined by Qualtrics (“**Scheduled Maintenance**”); and (b) causes outside of the reasonable control of Qualtrics that could not have been avoided by its exercise of due care, including any outages caused by: (i) the Internet in general; (ii) a Partner or End-Customer-caused event; or (iii) any Force Majeure Event (“**Availability**”).
2. **Scheduled Maintenance.** A minimum of five days’ advance notice will be provided by email to Partner or End Customer for all Scheduled Maintenance exceeding two hours. For Scheduled Maintenance lasting less than two hours, notice will be displayed on the login page.
3. **Downtime.** “**Downtime**” is defined as the Cloud Service having no Availability, expressed in minutes.
4. **Remedies for Downtime.** If Downtime exceeds a certain amount per month, Partner will be entitled, upon written request, to a credit (“**Fee Credit**”) based on the formula: Fee Credit = Fee Credit Percentage set forth below * (1/12 current annual Fees paid for Software affected by Downtime). All times listed immediately below are per calendar month.
    1. If Downtime is 30 minutes or less, no Fee Credit Percentage is awarded.
    2. If Downtime is from 31 to 120 minutes, Partner is eligible for a Fee Credit Percentage of 5%.
    3. If Downtime is from 121 to 240 minutes, Partner is eligible for a Fee Credit Percentage of 7.5%.
    4. If Downtime is 241 minutes or greater, Partner is eligible for a Fee Credit Percentage of 10.0%.

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Fees Exhibit

License Details

Start Date	End Date	Term in Months
First date of the initial period in the table below	Last date of the final period in the table below	36

Cloud Service Details

Period	Services	Price	Estimated Invoice Date	Payment Terms from Invoice	License Configuration
01-Oct-2024 TO 30-Sep-2025	Cloud Professional	$54,761.05 $15,051.54	Effective Date	Net 30	49677852
01-Oct-2025 TO 30-Sep-2026	Cloud Professional	$68,421.05 $3,711.34	01-Sep-2025	Net 30	49677852
01-Oct-2026 TO 30-Sep-2027	Cloud Professional	$68,421.05 $0.00	01-Sep-2026	Net 30	49677852
Total		**USD $210,366.03**			

Prices shown do not include applicable taxes. Applicable taxes will be presented on the invoice.

Excess Use
The Cloud Service is subject to Usage Metrics and volume specified in the Order Forms and Documentation. Any use of the Cloud Service that exceeds this scope shall incur additional fees. Fees accrue from the date the excess use began. Customer will execute an Order Form for additional quantities of the applicable Usage Metrics promptly upon Qualtrics' request, and/or pay any invoice for excess use, which will be sent on the next anniversary of the current annual period with net 30 payment terms. Customer will pay for excess use based on Qualtrics' prices on the date the excess use began.

Order Form

Cloud Service Exhibit

Cloud Service Renewal (not applicable to pilots or proofs of concept). Upon expiration of the full contract term as set out in the Fees Exhibit ("Initial Term") and each subsequent renewal term, the Cloud Service will automatically renew for a successive one-year term with a price increase of no more than 5% at such renewal, unless either party provides written notice of non-renewal or modification at least 90 days prior to the end of the applicable term.

[Description of Services on following page]

Order Form

	YEAR 1
	49677852

CLOUD SERVICE

EX

XM for People Teams Suite - Employees 2,730

	YEAR 2
	49677852

CLOUD SERVICE

EX

XM for People Teams Suite - Employees 2,730

	YEAR 3
	49677852

CLOUD SERVICE

EX

XM for People Teams Suite - Employees 2,730

XM for People Teams use is subject to the Definitions and Product Terms located at: https://www.qualtrics.com/EX-terms/

Qualtrics permits Customer to process a limited number of characters (as defined at https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/translate-text-responses) through its translation functionality per subscription year ("**Translation Limit**") at no charge. Qualtrics, at its discretion, reserves the right to strictly enforce this limit.

Order Form

Professional Services Exhibit: SSO Configuration

Customer agrees that Carahsoft may use subcontractors to deliver any portion(s) of the Project at Carahsoft's discretion.

1. **Definitions**
   a. "Delivery Team" refers to the SET of resources assigned for fulfillment of project scope. "Project" refers to the SSO Configuration to be provided under this Professional Services Exhibit.
   b. "Standard Business Hours" are 0900 to 1700 hours according to the time zone of the office in which Delivery Team is located, unless otherwise agreed to in writing during the Project.

2. **Project Scope**
   a. Inclusions
      i. SSO (Single Sign-On) Configuration
   b. 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.

3. **Responsibilities**
   a. Delivery Team Responsibilities
      i. Provide documentation, specifications, and requirements for SSO set-up.
      ii. Conduct Q&A session with Customer and Customer IT/SSO team to identify any potential roadblocks, including a non-standard SSO system.
      iii. Configure a test brand to validate SSO setup.
      iv. Provide configuration details for the test brand and a login URL for setup validation.
      v. Provide support in troubleshooting any errors that arise in the test instance.
      vi. Test the SSO setup within a test brand before transferring to the live brand.
      vii. After successful testing of the configuration, provide configuration details to the Customer for the live brand, then transfer the configuration to the live brand.
   b. Customer Responsibilities
      i. Provide key configuration details of SSO system as requested by Qualtrics, dependent on the type of SSO connection.
      ii. If customer SSO can support it, ensure SSO is set up to pass any user attributes required for dashboard permissioning.
      iii. Ensure that a user in the Customer's IdP can successfully login to the Qualtrics platform using their SSO credentials.
      iv. Manages User Acceptance Testing ("UAT") process and any special testing requirements.

4. **Governance**
   a. Delivery Team will reach out to Customer after completion of request survey within the timeline specified in request survey to schedule a Project kickoff call or coordinate via email. Timing of kickoff call will be mutually agreed between Delivery Team and Customer based on Delivery Team availability and Customer's milestones.
   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 videoconference.

5. **Acceptance Criteria**

a. Once SSO Configuration is completed and the Delivery Team provides notification for review and approval, the Customer will either (1) confirm the requirements have reasonably been met and sign off on the approval 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. SSO Configuration will be reviewed and signed off according to the following process:

   i. Delivery Team will provide configuration details to the Customer for the live brand and transfer the configuration to the live brand 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 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 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 within 2 business days.

   vi. SSO Configuration will be considered accepted if the Customer does not provide written notification of SSO Configuration 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. Qualtrics 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.

Statement of Work

Customer agrees that Carahsoft may use subcontractors to deliver any portion(s) of the Project at Carahsoft's discretion. Carahsoft currently intends to use Red Pepper. Qualtrics will provide notice to Customer if the delivery subcontractor changes.

Carahsoft	**Riverside City**
By (signature):	By (signature):
Name:	Name:
Title:	Title:
Date:	Date:
Carahsoft Primary Contact:	**Customer Primary Contact:**
Name:	Name:
Email:	Email:

Parties:	Carahsoft ("**Delivery Team**")		
	Riverside City ("**Customer**")		
Effective Date:	Date of last signature hereto.		
Services:	As set forth in the attachment below.		
Term:	As set forth in the attachment below. This Statement of Work ("SOW") is being performed under the terms of the Master Service Agreement ("MSA") dated March 11, 2024. If there is a conflict in a term between the MSA and this SOW, the SOW will govern.		
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
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 customers 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 customers 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.* Service Provider agrees that during the term of this Statement of Work 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 Statement of Work; (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 Service Provider 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 Service Provider during the course of Customer's business ("Third Party Information"). Notwithstanding the foregoing, it is understood that Service Provider 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 Statement of Work; and Service Provider's own skill, knowledge, know-how, and experience. **Processing of Personal Data**. Customer acknowledges and agrees that Delivery Team may need to collect and process personal data of Customer’s natural-person end users or customers (collectively, “Personal Data”) in the course of the Services to adequately provide software deliverables and solutions. In such circumstances, Delivery Team will collect and process Personal Data only as a delivery team and processor acting on behalf of Customer, according to the written instructions of Customer. In no event will Delivery Team be a controller or joint controller with Customer for processing of Personal Data. Delivery Team will not directly or indirectly sell any Personal Data or retain, use, or disclose any Personal Data for any reason other than for the purpose of providing the Services to Customer under the terms of this agreement and in accordance with applicable privacy laws. To the extent Delivery Team may receive, maintain, use, process, or disclose Personal Data on behalf of Customer in circumstances or with respect to Personal Data that is subject to strict U.S. consumer privacy laws (such as CPRA or VCDPA) or international data protection laws (such as GDPR) that require a formal data processing agreement (a “DPA”), Customer acknowledges and agrees that Delivery Team shall engage in processing all Personal Data subject to the terms of Delivery Team’s separate DPA, available at the following link and incorporated herein by reference: https://redpeppersoftware.com/data-processing-agreement/ **Logo and Likeness:** Service Provider 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 $515.46 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 ninety (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 Statement of Work.
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 EX Engagement Implementation** including the following deliverables
      1. Please note that **only the Deliverables listed immediately below are included in this Project**. Each line item represents a Deliverable and quantity.
         a. EX Project Management and Training (1)
         b. EX Survey Configuration (1)
         c. EX Dashboard Configuration (1)
            i. (Max 3 pages, 20 widgets/survey, max 60 widgets total, max 3 roles, 1 source)
         d. EX Engagement Org Hierarchy Advisement (1)
         e. Action Planning Configuration (1)
         f. Access to Best Practice XM Solution (1)
         g. EX Simple Mail Transfer Protocol (SMTP) Relay Setup (1)
         h. Text iQ Configuration (1)

   ii. **Standard EX Lifecycle Implementation** including the following deliverables
      1. Please note that **only the Deliverables listed immediately below are included in this Project**. Each line item represents a Deliverable and quantity.
         a. EX Project Management and Training (1)
         b. EX Survey Configuration (1)
         c. EX Dashboard Configuration (1)
            i. (Max 3 pages, 20 widgets/survey, max 60 widgets total, max 3 roles, 1 source)
         d. Access to Best Practice XM Solutions
         e. EX Simple Mail Transfer Protocol (SMTP) Relay Setup (1)
         f. EX Lifecycle Triggers & Directory Import Setup (1)
            i. Does not include a hosted SFTP server
         g. XM Directory Automations Support (1)
            i. Does not include a hosted SFTP server
         h. Text iQ Configuration (1)

   iii. **On Demand Hours**
      1. Delivery Team will be available for a total of **twenty (20) On Demand hours** to be used during the defined project duration. These hours may be used for any of the following activities:
         a. Guidance on project structure and design
         b. Guidance on project configuration
         c. Guidance on SFTP hosting transfer
         d. General project status calls
         e. Research and respond to emailed questions
         f. General training
      2. Consulting hours are intended to be used for project-specific guidance. Any support required beyond the included hours may require a new, signed statement of work with additional fees. For general product questions, we recommend using the online resources at qualtrics.com/support or contacting the Qualtrics Support team. These services do not count towards consulting services.

   iv. **Engineering Services**
      1. SFTP Site Creation
      2. Hosting of SFTP Site - Year 1 only

b. Exclusions
   i. Anything not listed above is excluded from scope of the Project.
   ii. No coding customizations will be provided by the Delivery Team.
   iii. Year 2 Services are excluded from the scope of the Project. Delivery Team 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 live online training, online materials, and/or free online webinars.
   iii. Offers guidance and support required to ensure Customer can fulfill the responsibilities listed.
   iv. For projects that involve a new license setup, provides initial configuration of license and Qualtrics account, including creation of up to three (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.
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 twenty-four (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 Statement of Work, subject to the Delivery Team's queue. The Project duration will be as follows:
   i. Week 1 – 16: EX Engagement and EX Lifecycle. If additional weeks are needed or requested by Customer, the cost is $500 p/week.
   ii. Week 1-4: SFPT Site Creation. If additional weeks are needed or requested by Customer, the cost is $500 p/week.
   iii. Week 1-52: Annual Hosting. This Annual Hosting does not renew. Customer will need to migrate automations from Delivery Team's server to Customer server.
   iv. Office Hours. The available Office Hours can be scheduled as one (1) hour sessions up to twice a month for twelve (12) months beginning immediately upon completion of initial implementation. At the conclusion of the Office Hours duration, any unused hours will not roll over.
      1. This Statement of Work renews annually with the same terms and conditions. If Customer wishes to discontinue office hours they must provide written notice to the Delivery Team thirty (30) days prior to the annual renewal date, which is the date this Statement of Work is fully executed by both parties.
b. 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 five (5) business days prior to the Deliverable completion date.
   ii. Customer will sign off or report any issues within five (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 two (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 Statement of Work.

8. Payments and Fees

Item(s)	Invoice Date	Price (USD)
Standard EX Engagement Implementation Standard EX Lifecycle Implementation On Demand Hours (Year 1 Only) SFTP Site Creation Hosting of SFTP Site – (Year 1 only)	Date Signed	$3,608.25 $3,608.25 $3,711.34 $515.45 $2,061.86
	Total:	$13,505.15

Schedule 1: Implementation Deliverable Description Glossary

For a list of specific Deliverables included in this Project, refer to Section 2: Project Scope above.

The following glossary 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 Statement of Work.**

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 Delivery Team 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
Access to Best Practice XM Solution	**Delivery Team Responsibilities** Review and provide Qualtrics best practices documentation. Provide training on accessing Qualtrics XM Solutions within the Catalog. **Customer Responsibilities** Performs responsibilities necessary for the Project and as outlined in this Statement of Work.
Action Planning Configuration *Delivery Team will review and provide guidance on existing Customer action planning materials and recommendations for enhancements.*	**Delivery Team Responsibilities** Review of pre-existing Customer action planning materials (e.g., manager guides, HRBP training materials, action plan templates). Provide recommendations for improvements and guidance on action planning best practices; no new or custom content will be developed for Customer. Provide baseline Suggested Actions by survey items, with no customization. Provide guidelines on the use of the Action Plan dashboard feature. **Customer Responsibilities** Provide relevant inputs as requested by Delivery Team for review.
Action Planning Custom Toolkit *Collaboratively design customized action planning materials to support the employee feedback program.*	**Delivery Team Responsibilities** Review of historical Customer action planning materials (e.g., manager guides, HRBP training materials, action plan templates). Collaborate on redesign of new supporting action planning materials, based on Qualtrics best practice, including: how to interpret and share results, how to create and mobilize action. Run 2 rounds of revisions. Provide baseline Suggested Actions by survey items, with customization and 2 rounds of revision. Provide guidelines on the use of the Action Plan dashboard feature. **Customer Responsibilities** Provide relevant inputs as requested by Delivery Team for review.
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.* *Must be purchased with API introductory support.*	**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 developers (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. **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.

	Note: Any custom coding required as part of the API setup must be done by Customer. Delivery Team does not offer assistance or consultation on custom coding.
Benchmark Mapping and Data Load *Benchmarks are loaded into dashboards and displayed as a comparison column in the dashboard widgets for all dashboard users.*	**Delivery Team Responsibilities** Review and map existing survey content to any applicable benchmark as specified in Benchmark Access. Load number of licensed benchmark(s) from the standard World Norm cuts into Customer dashboard as a comparison for this project. **Customer Responsibilities** Conduct user acceptance testing as needed to verify that the data load was successful.
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).
Contact Frequency	**Delivery Team Responsibilities** Provide training session on setup of contact frequency settings. **Customer Responsibilities** Define the frequency in which recipients should receive messages from the Qualtrics platform.
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** Conduct a scoping and design call with Customer upon commencement of license to agree upon dashboard content and layout. Create one (1) dashboard and connect it to one (1) survey, after survey has been programmed. (Any delays in completing the design and programming of the survey may result in a delay of the survey mapping in the dashboard.) Map up to twenty (20) survey questions and up to ten (10) embedded data fields to the dashboard. Configure dashboard with up to three (3) pages, including up to twenty (20) widgets per page. (Dashboard to be built in English only, using standard features. More details on product capabilities may be found on Qualtrics Support web pages available at www.qualtrics.com/support) Create up to three (3) dashboard access permissions and roles and send dashboard invites. Assign dashboard access permissions in the Qualtrics platform for all relevant stakeholders. Prior to the dashboard launch, run a pre-launch review to walk through configurations and distribution setup. Provide training of technical setup of dashboard to core delivery team. **Customer Responsibilities** Design and confirm setup of all survey(s) that are to be mapped to dashboards. Determine survey and key metrics to be used in the dashboard. Validate that the correct data has been mapped, widgets and filters work as expected, and user permissions are set accurately. Verify that roles and permissions are correct to ensure that any users who require data restrictions or role-based access have appropriate attributes saved in the Qualtrics platform. Maintain the dashboard after the implementation period, including the addition of further surveys, changes in layout, and changes in access for dashboard users. Provide dashboard end-user training.
Dashboard Roles Management	**Delivery Team Responsibilities** Conduct training session on role creation. Support creation of role-based access to the dashboard, including access to specific pages and responses, as defined by Customer. **Customer Responsibilities** Setup users specific to specified roles. Prepare any necessary files of users to be imported into role access. Define and program restriction levels for created roles.
Historical Data Advisement *Historical survey data may be loaded into the dashboard for this project, adding additional context and trend information to newly-collected scores.*	**Delivery Team Responsibilities** Provide guidance on up to two (2) data import(s) per project, with up to one (1) year of historic data each. Import the populated participant and response data files into the container survey, and use the participant data to generate one historical hierarchy. Provide to Customer templates for participant data (if required) and response data. The survey may include up to up to thirty (30) questions, including up to thirty (30) embedded data fields. **Customer Responsibilities** Configure a new survey or create a copy of an existing survey to be used as a container for historical data import. Populate participant data and response data templates with historical data to be imported into Qualtrics platform. Map the historical hierarchy to the current project hierarchy, if required. ***Note:*** *Any delays in providing survey questionnaire, final participant data and final response data files may result in a delay of mapping historical data into dashboard(s).*
Lifecycle Triggers & Directory Import Setup *With Directory Import and Lifecycle Automations, you can automate the pulling of HRIS records into your employee directory and trigger Lifecycle survey invitations.*	**Delivery Team Responsibilities** Provide assistance to the Customer covering the configuration and setup of (1) Employee Directory Import using either Qualtrics File Server (QSF) API endpoint or SFTP connector with customer-hosted SFTP server. Provide documentation related to Qualtrics File Service (QSF) and SFTP Connector. Provide guidance and assistance in configuration, testing and troubleshooting of: ● File processing rules ● Scheduling (hourly, daily, weekly) ● PGP encryption Provide assistance to set up one (1) Lifecycle survey automation trigger. **Customer Responsibilities** If using SFTP connector, Customer will provide their own SFTP server. (Qualtrics-hosted or Delivery Team- hosted SFTP service must be scoped and purchased separately.) Acquire any necessary login credentials before import is scheduled. Provide a properly structured CSV file for import. Set up additional imports if more than one is required.
Org Hierarchy Advisement	**Delivery Team Responsibilities**

Organization hierarchies allow you to manage manager-employee relationships throughout your organization.	Upload employee data file as provided by Customer. Generate one (1) organization hierarchy in the Qualtrics EX Platform. Provide guidance to Customer on employee data import and generation of additional hierarchies. **Customer Responsibilities** Provide a single CSV (Comma Separated Values) data file to the Delivery Team with all required information to set up reporting hierarchy, as well as manager dashboard access specifications. Perform any data cleanup required to ensure successful import. Configure permissions to provide or restrict access to any or all of the employee data loaded into the Qualtrics platform.
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.*
Project Management and Training *Project management and training ensures that your projects have dedicated help with regular meetings and documentation.*	**Delivery Team Responsibilities** Build and manage project plan based on features included in Customer's license and requirements of Customer's program. Hold regular project management meeting to review progress against project plan. **Customer Responsibilities** Provide necessary inputs to build and manage project plan. Ensure relevant stakeholders attend regular meetings. Fulfill all items listed under Customer Responsibilities in this contract and Glossary in the timeframe set out in the project plan.
Report Configuration	**Delivery Team Responsibilities** Provide support/training on creation and customization of one (1) standard report. **Customer Responsibilities** Configure report to align with business needs.
Sender Policy Framework (SPF) Record Setup *An SPF record can be used to grant permission for another entity to send mail on their behalf, as if it has been sent from the original domain owner.*	**Delivery Team Responsibilities** Verify that SPF record exists on the Customer domain. Set permission for Customer domain to send email as coming from Customer's Qualtrics brand. **Customer Responsibilities** Ensure that SPF setup is completed by the administrator of the Customer domain prior to SPF setup on Customer's Qualtrics brand.
Simple Mail Transfer Protocol (SMTP) Relay Setup *An SMTP relay involves sending emails from Qualtrics email servers to Customer email servers with the instruction to forward them to the originally intended recipient (the individual potential respondent in each case).*	**Delivery Team Responsibilities** Test the SMTP connection before enabling the relay for all outgoing email from Customer's Qualtrics brand. Provide IP ranges as needed. **Customer Responsibilities** Ensure that Customer organization maintains email server capable of handling multiple simultaneous connections from Qualtrics and sending multiple emails per second (<150ms response time is desirable). Provide detailed parameters for forming the relay, including domain information and user credentials if required. If required, coordinate with Customer technology to whitelist Qualtrics email server by IP range.
Single Sign-On (SSO) Configuration *With Single Sign-On (SSO), users can log into the Qualtrics platform using their organization's internal login system, providing a seamless user experience, and allowing simple attribution of*	**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. Provide configuration details for the test brand and a login URL for setup validation.

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 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 SSO system as requested by Delivery Team, dependent 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.
Survey Configuration *Delivery Team will build and configure the logic and look and feel of your survey.*	**Delivery Team Responsibilities** Configure one (1) survey with up to thirty (30) questions and up to thirty (30) embedded data fields using standard out-of-the-box functionality, in English only. Complete up to two rounds of revisions. Prior to the survey launch, run a pre-launch review to walk through configurations and distribution setup. **Customer Responsibilities** Provide documentation clearly outlining survey content. Provide feedback on survey drafts provided by Delivery Team. Nominate test respondents, manage internal communication and completion milestones for any User Acceptance Testing. Validate that all responses are collected in the format expected before the first project is launched.
Survey Invitation Distribution Setup	**Delivery Team Responsibilities** Configure up to one (1) survey distribution from the Qualtrics platform. Customer Responsibilities Provide all necessary information needed for distribution setup.
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.
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.*
Theme Configuration *Custom theme allows you to brand your survey look and feel with specific colors and graphics.*	**Delivery Team Responsibilities** Provide link to Custom Theme survey. Load custom theme into Customer brand. **Customer Responsibilities** Complete the Custom Theme survey, providing necessary colors, graphics etc.

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 Delivery Team 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 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 Delivery Team-hosted SFTP account) or the Qualtrics File Service (QFS). Note that there may be additional services costs for a Delivery Team-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 Delivery Team-provided SFTP server, information required by Delivery Team Engineering such as IP Address range information will be provided to Delivery Team 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 Delivery Team 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 Delivery Team 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 Statement of Work. Have Qualtrics XM Directory Automations enabled on Customer's Qualtrics license. Qualtrics XM Directory Automations are priced separately and not included in this Statement of Work.

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 times a respondent can be contacted by your brand to prevent response fatigue and improve the survey taking experience.*	**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.
XM Directory Advanced 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 times a respondent can be contacted by your brand to prevent response fatigue and improve the survey taking experience.*	**Delivery Team Responsibilities** Provide consultation on transactional data, distribution funnel reporting, and multiple directories. Review configuration and verify best practices are followed. **Customer Responsibilities** Build integrations between Qualtrics platform and Customer databases as required for this Project. Maintain any lists, integrations or settings configured as part of this Project. ***Note:*** *Does not include automations support - support for XM Directory Automations must be purchased in addition to this deliverable.*