LISTRAK

Listrak CRM

SCOPE

- Listrak CRM includes the data integration and platform setup necessary for the use of the following CRM features:
    - **User Licenses** – Listrak will provide up to 5 Standard CRM User Licenses for dashboard access and data exploration within CRM.
    - **Data Visualization** – Over 70 pre-built, customizable data visualization tiles that contain a variety of analytic reports, including cohort analysis, pareto distributions, and survival analysis. These tiles can be customized and added to personal or shared team dashboards. Standard included dashboards are:
        - Customer Analytics
        - Customer Lifecycle
        - Customer Retention
        - Predictive Analytics
        - Sales Channel Performance
    - **Data Exploration & Insights** – Build custom reports using a unified customer data model containing:
        - Customer profile data
        - Order activity
        - Message engagement
        - Product purchase details
        - Predictive models

      Explore customer data to uncover insights and learn about the behaviors and patterns of your new and best customers.
    - **Audience Activation** – Users can create CRM audiences from any data visualization report displaying contacts. With these audiences, marketers can send targeted, relevant broadcast messages using simple filters. As shoppers enter or exit CRM audiences, trigger automated campaigns as behaviors occur. CRM audiences can also be added as an optional filter to any dashboard.
- Listrak will provide your team with the necessary integration information required to upload the following required data feeds if this has not already been completed for an existing Listrak solution. Integration includes your ecommerce order data and up to two (2) other order sources (i.e. POS, phone). Integrating and validating order sources beyond this scope is available for an additional cost.
    - If you are using Magento, Shopify, Big Commerce or Salesforce Commerce Cloud as your eCommerce platform, product/purchase/contact data can be pulled directly from your platform using Listrak's Magento module, Shopify App, or Listrak's Salesforce Commerce Cloud cartridge.
    - If you are **NOT** using Magento, Shopify, Big Commerce or Salesforce Commerce Cloud as your eCommerce platform, **OR** during data planning it is determined that data is needed in addition to what is available from the platform integrations listed above, **OR** have additional order sources (i.e. POS, phone, catalog), you will need to send the following data files to Listrak's FTP:

        - Product file
        - Customer file
        - Order receipt file
        - Order receipt items file
        - Historic orders file

- Listrak will provide the necessary information required (JavaScript or Listrak module) to integrate your website with conversion tracking, browse activity tracking and cart activity tracking if this has not already been completed for an existing Listrak solution. Listrak will perform up to two (2) rounds of technical integration verification.
- Listrak provides an online video training course on how to best utilize the Listrak CRM platform within your Listrak account. Contact your account manager for personalized training sessions.
- Additional support packages are available to assist clients with custom dashboard build-outs and data strategies. Any campaign recommendations provided are assumed to be implemented by the client; professional services are available for an additional cost.

CRM IMPLEMENTATION & SUPPORT SCOPE

Listrak CRM Implementation & Support includes an onboarding process to ensure clients are trained and able to maximize their use of the CRM platform. The following steps are included in onboarding:

Included for all CRM sales:

- **Data Review & Validation** (not to exceed 8 hours): A full review of transactional and customer data to ensure that key metrics such as revenue, order counts and subscribed contacts match up to retailer provided numbers for validation. This process also ensures that changed records appear for CRM reporting and analytics in a timely manner.
- **Self-Service Course Training:** Video courses online to help learn the basics of CRM dashboards and data exploration functionality.
- **Technical Support**: Standard support offering via email, phone or live chat. Success engineers are available 8:30am-8:00pm ET to answer questions related to viewing, building or otherwise customizing CRM dashboards and audience trigger.
    - Email – support@listrak.com
    - Phone – (717) 627-4528 x1
    - Live Chat – In app under Support > Live Chat & Notifications

Silver "Jump Start" Package (not to exceed 30 hours):

- **Pre-Built Dashboard Evaluations**: A collaborative session to review pre-built Listrak CRM dashboards and put custom modifications in place to better align dashboard visualizations with business goals. In a discovery call, Listrak analysts will review business objectives and outline updates to be made to any pre-built dashboards including unique order status or product information considerations.
- **Custom Dashboard Creation** (up to 15 analytics services hours; up to 3 custom training hours on custom dashboards): Following a discovery call, a custom dashboard may be decided upon and built by Listrak data analysts. Any custom dashboards will be defined and built by Listrak employees to give retailers a starting point to build out or modify any additional dashboards for their business. Listrak analysts will spend up to 15 hours building out custom dashboards and provide up to 3 hours of custom training based on dashboards delivered.

- **Custom Data Quality Review & Recommendations** (up to 2 rounds): A data review by Listrak data analysts to uncover any missing custom data valuable to a successful CRM strategy. Examples include customer preference or demographic data, unique order attributes or processes. Up to two (2) rounds of data review are included, additional effort or technical integration adjustments may require a statement of work.
- **Tailored Data Strategy** (up to 10 analytics services hours): Listrak analysts will work to understand all important business goals and objectives to build out a comprehensive data strategy intended to uncover areas of opportunity and growth. Up to 10 hours of analytics and strategy services team resources are included.
- **Creation of audiences** (up to 6 audiences): Based in findings from the data strategy, Listrak analysis will create up to 6 custom audiences that can be used to support campaign tactics recommendations.
- **Tailored Campaign Recommendations** (up to 3 campaign recommendations): Using the findings from the data strategy, up to three (3) campaign recommendations will be presented to the retailer along with message and workflow templates. Retailers may then take these recommendations and build out campaigns as they desire to add relevant and timely customer lifecycle messages to their overall marketing strategy.
    - Note: Campaign Implementation would be separate Professional Services fee.

Professional Services work not listed above will require a statement of work. Costs reflect implementation for only those solutions listed, not all future roadmap items. Out of scope or new/additional solutions may require a change order. Additional strategy and analyst support hours can be provided at a cost (see below).

OPTIONAL STRATEGY & ANALYTICS SERVICES SUPPORT

(PURCHASED FOR AN ADDITIONAL COST):

Gold Package (Ongoing support not to exceed 30 hours per quarter):

- **CRM Planning Sessions**: Listrak analysts will schedule planning sessions three (3) times per contracted year for discussions around retailer concerns, analytics or campaign ideas. This session will guide additional work to be performed on tuning dashboards and campaigns.
- **120-day Dashboard Review**: To ensure the Listrak CRM platform is providing maximum value to the retailer's business, our team of data analysts will review all dashboards three (3) times each contracted year to identify areas of opportunity based on campaign performance. They will also review relevant, new CRM data visualization insights observed from the Listrak community.
- **120-day Campaign Review**: By regularly reviewing CRM campaigns, our team of data analysts will review campaign statistics and performance three (3) times each contracted year to identify areas of opportunity. They will also review relevant, new CRM campaign strategies and insights observed from the Listrak community.

Platinum Package (Up to 10 hours / mo. for work performed by Listrak data analyst and/or digital strategist):

- **Custom Analytics Requests**: At any time during the contract, retailers may engage their assigned CRM analyst to request a custom analytics report or dashboard. These requests are best used when strategies and tactics evolve throughout the year and results need to be evaluated in real-time versus every four (4) months.
- **Strategic Recommendations**: As customer data requests become broader they require a deeper analysis that may involve a formal presentation of findings. These findings would then be translated into suggested campaign updates or insights into additional marketing opportunities.

Professional Services work will require a statement of work.