



Welcome Series

SOLUTION DESCRIPTION

The Welcome Series solution deploys strategic brand introductory emails to new email contacts who have subscribed through an integrated acquisition source on your site.

SCOPE

Up to three (3) emails:

- **Three (3) Welcome Series Emails:** Deployed automatically based on email subscription at strategic intervals

Integration Guidance:

- Provide information required to setup up to (6) email acquisition sources (aka "subscription points") to trigger deployment of Welcome Series messages. Depending on your website platform, subscription point integration options may include a pre-built Listrak module, JavaScript, API, or HTML form code
- Provide information required to integrate your website with Listrak's platform, if this step has not already been completed for an existing Listrak solution, in accordance with Listrak's integration guides

Application Setup, including the following:

- Generate the necessary list, external events, and segmentation required for the solution
- Configuration of solution settings
- Up to one (1) Listrak Conductor Conversation
- Upload of supplied dynamic or static coupons

Custom Content Strategy & Creative:

Option 1: Listrak Creative:

- Listrak will generate a custom-designed message for your approval, based on your job start requirements including, but not limited to: branding guidelines, promotional suggestions, product selections, copywriting, images, layout requests, etc.
 - Each email will be built upon the same design wireframe for visual brand consistency; elements within the body of each email can change, but the overall layout will remain consistent.
- (optional) Up to two (2) rounds of content or creative revisions to the messages prior to the conversion to HTML.

Option 2: Client Provided Creative:

- Listrak will provide a selection of mobile-friendly, responsive-ready, Photoshop PSD email wireframes so you can choose the layout that best matches your needs
- For each message, Listrak expects that you will:
 - Design within the bounding boxes; content that extends outside of a bounding box will likely render the design inappropriate for responsive use
 - Provide designs in the original layered Photoshop PSD file
 - Include all fonts and linked images
 - Design for desktop rendering only; Listrak will provide a mobile layout based on our responsive design best-practices
- Listrak will review the PSD file(s) you return and provide one (1) round of suggested changes if your design does not adhere to best practices as defined by Listrak

- If changes are required, it is expected by Listrak that you will:
 - Make the suggested changes and return the files back to us
 - (optional) If you do not wish to make the changes, you may elect to use the design as is in a non-responsive format
- Listrak will code all finalized compositions

Quality Control

Creative Testing:

- All creative will be proofed and tested for rendering functionality in the following as applicable to the solution:
 - Supported email clients include: Yahoo, Gmail, Outlook 2007 or later, Apple Mail 9 or later, and limited AOL
 - Supported mobile clients include: Android 4.4 or later, Gmail App, iPhone 5s (iOS7) or later, iPhone6, iPhone6 plus, iPhone 6s, iPhone 6s plus, iPhone 7, iPhone 7 plus, iPad (Retina), and iPad Mini
 - Supported desktop browsers clients include: Internet Explorer 9 or later, Firefox (latest version), Chrome (latest version), and Safari (latest 2 versions)
 - Supported mobile browsers: Chrome for Android (latest 2 versions), Chrome iOS, Mobile Safari (latest 2 versions), Android browser, and Firefox for Android

Solution Testing:

- Up to two (2) rounds of testing for functionality and accuracy, in accordance with how solution is expected to perform

LIMITATIONS

- **Primary Email Modifications:** Listrak will allow minor copy modifications to tweak the first welcome message per acquisition source. This applies to minor copy edits to the first welcome message only; if you request additional copy, design, or layout modifications to a message, the resulting message will be considered a unique message and will be deducted from the three (3) messages included in your Welcome Series. If you desire more than three (3) messages, Professional Services fees may be incurred at the prevailing billable rate.
- **Responsive Design:** Responsive design may require creative changes to client-provided designs. If we need to perform these changes, all revisions must be approved by you.

OUT-OF-SCOPE

- **Changes to Client-provided Creative:** All creative and content provided to Listrak is assumed to be correct, and any changes that are required or requested of Listrak may incur Professional Service fees at the prevailing billable rate. Changes to responsive layouts and HTML tests beyond the one (1) included round of revisions, after the creative design has been approved and converted to HTML, or once the solution is approved may incur Professional Service fees at the prevailing billable rate.
- **Changes to Listrak-provided Creative:** Changes to creative and content beyond the two (2) included rounds of revisions or once the creative or content is approved may incur Professional Service fees at the prevailing billable rate.
- **Unique Creative per Message:** All messages within the solution will be designed per the same wireframe for visual brand consistency. Elements within the body of each email can change, but the overall layout will stay the same. If you desire wholly new design per message, necessary Professional Services design fees may be charged at the prevailing billable rate.
- **Updates/Break-Fix:** If you modify an email's original HTML (as provided by Listrak), your website, or eCommerce platform/provider in any way that would affect the solution or any technical integrations with Listrak, necessary Professional Service fees may be charged at the prevailing billable rate to

troubleshoot and resolve resulting issues. The same applies to client-caused break-fix scenarios within the Listrak application.

- **Additional Solution Functionality Testing:** Testing and troubleshooting of technical integration beyond the two (2) included rounds of verification may incur Professional Service fees at the prevailing billable rate. If troubleshooting requires the assistance/participation of a Listrak Developer, the same billable rate may apply
- Any changes to the solution scope as provided from Listrak may require a statement of work and additional investment. A custom scope definition will be provided in a separate document for your review.
- **Any feature or functionality not expressly addressed in this scope document is considered out-of-scope by default.**