Listrak Self-Service: Welcome Series

SOLUTION DESCRIPTION

Listrak's Welcome Series includes email acquisition sources (aka "subscription points" or "web forms") to be used as trigger points for the Welcome Series. Each subscription point will need to be set up to ask for the visitor's email address and funnel their information into Listrak.

The Welcome Series also includes a series of email messages (typically three) to nurture new subscribers and guide them toward being an engaged customer.

YOUR RESPONSIBILITIES:

Integration:
- Integrate your website with Listrak's platform, if this step has not already been completed for an existing Listrak solution, in accordance with integration guides provided by Listrak
- Create any necessary web forms on your website to be used as email acquisition sources (aka "subscription points"), and hook them up to trigger Welcome Series emails by using HTML form code, JavaScript, or API

Application Setup, including the following:
- Setup your Listrak platform account utilizing Thrive, Listrak's learning management system to include:
  - Generate the necessary external events, and segmentation required for the solution
  - Setup the necessary Listrak Conductor Conversation to automatically deploy your messaging
  - Map subscription points within subscription settings
- Additional setup may be required for the Listrak Recommendations solution investment, including:
  - Creation of solution Merchandise Blocks (within the Listrak Recommendations Engine)
  - Creation of solution Recipes (within the Listrak Recommendations Engine)

Content & Creative:
- Write, design, code, and implement all messages for your solution using Listrak Composer, or your preferred HTML builder.
- If a Listrak Recommendations Solution investment has been made, you may insert product recommendations into the message

Quality Control
- Utilize and complete provided verification checklists to test the integration and solution for functionality and accuracy in accordance with how the solution is expected to perform

LISTRAK'S RESPONSIBILITIES:

Integration Guidance:
- 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:
- Setup your merchant within the Listrak platform
- Enable all necessary settings for access to Thrive, Listrak's learning management system
- Generate the necessary list for your solution.
- Ongoing release notes and educational articles through Listrak's Knowledge Base

Content & Creative:
- Provide template options for your messaging will be available for use within our in-platform email builder, Listrak Composer.

Quality Control:
- Provide quality testing checklists for setup verification and pre-deployment testing for you to complete
- Up to two (2) rounds of testing for functionality and accuracy, in accordance with how solution is expected to perform

OUT-OF-SCOPE:
- **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.

- **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.

- 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.**

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