Professional Services Scope

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DEFINITIONS

- **Account:** Client's unique entity within the Listrak platform.
  - **Organization:** A secondary tier within Client's Listrak Account to hold one or more business entities.
  - **Domain:** A single business entity Client is contracted to operate within Client's Listrak Account.
  - **Merchant ID**: The unique Listrak identifier used to associate Client's Domain within Client's Listrak Integration and the Listrak platform.
- **Integration:** The process of connecting systems to enable seamless data exchange and automation.
  - **Listrak Integration:** The Integration between Client's website and the Listrak platform.
  - **Third-Party Integration:** Any Integration between Client's system or Client's vendor (something other than the Client's website) and the Listrak platform.
- **Contact:** An identifiable person who has engaged with Client's business in some way and is recorded in Client's Listrak Account.
  - **Subscriber:** A Contact who opts-in or indicates a desire to receive communications for Client's Domain.
  - **Unsubscriber:** A Subscriber who opts-out of receiving communications for Client's Domain.
  - **Resubscriber:** An Unsubscriber who opts-in to receive communications for Client's Domain.
  - **Customer:** A Contact who has purchased from Client's Domain, based on data in the Listrak platform.
- **Channel:** The specific medium by which Messages are delivered and consumed by a Contact (e.g., Email, SMS, Browser Push/Web Push, App Push, Website, etc.).
- **Solution:** Functionality in the Listrak platform to support Client's marketing tasks and activities (e.g., acquisition, segmentation, engagement, personalization, Triggered Message deployment, reporting).
  - **Data-Dependent Solution:** A Solution where the operation, functionality and effectiveness are dependent on Client's ability to deliver timely, compliant, and accurate data to the Listrak platform.

- **Experience:** A Listrak interface where the Contact interaction occurs online, while visiting Client's website or through a stand-alone webpage. (e.g., Popup, Landing Page, Preference Center.)
- **Composer:** The drag-and-drop email Message authoring tool in the Listrak platform.
- **Message:** An individual, often personalized piece of communication delivered to a Contact in a specific Channel (e.g., Email Message, SMS Message).
  - **Triggered Message:** A Message sent to a Contact or Subscriber based on the Listrak platform automatically acting on a pre-defined rule or functionality related to a Contact's subscription status, actions, or behaviors.
  - **System Message or System Response**: A universally available, specialized type of Triggered Message, typically sent to adhere to compliance requirements when a Contact takes specific actions.
  - **Transactional Message:** A Message sent to a Contact or Subscriber based on the Listrak platform receiving a Client-initiated signal indicating and including the required Message details.
  - **Broadcast Message:** A general, informational or promotion Message, not Triggered or Transactional, sent to Subscribers on Client's primary list for the associated Channel ("Master List").
- **Journey:** A structured, automated sequence of Triggered Messages designed to guide a Contact through a predefined Experience or lifecycle stage, based on the Contact's attributes, behaviors, or actions.
  - **Journey Hub:** Listrak's modern tool to create and orchestrate Journeys within and across Channels.
  - **Custom Event:** A specialized, Client-configurable method to trigger Contacts into a Journey, often through a file import, Listrak JavaScript Integration or Listrak API Integration.
  - **Segment Entry Event:** A specialized method to trigger a Contact into a Journey based on the Contact matching segmentation criteria defined in the Listrak platform.
  - **Custom Journey:** A Journey where the method to trigger a Contact into the Journey uses a Custom Event or Segment Entry Event.
  - **Standard Journey:** A Journey where the method to trigger a Contact into the Journey is not a Custom Event or Segment Entry Event and is associated with the Channels and/or Solutions included in Client's SOF for the Listrak platform. (e.g., List Subscription, Page Browse Abandonment, Product Browse Abandonment, Shopping Cart Abandonment, Purchase, Winback, Review Request, Back In Stock, Low Inventory, Price Drop, Replenishment, Inbound SMS, Shopify Transactional Messages).
  - **Conductor:** Listrak's classic tool to create and orchestrate email Journeys.
  - **Conversations:** The name of an email Journey built in Conductor.
- **Sender Code:** A unique identifier used to distinguish the sender of SMS Channel Messages.
- **Coupon Code:** A unique sequence of characters, a specialized image (e.g., barcode, QR code), or a specialized URL provided to a Contact which allows for the redemption of a discount, special offer, or promotion at Client's website, store, or business.
- **Campaign:** The combination of Solutions, Experiences, Journeys, and/or Messages working across one or more Channels to support Client's goal to drive a Contact behavior, purchase, or marketing outcome.
- **Listrak Program:** The combination of Client's contracted Listrak platform functionality, Integrations, Contacts, Channels, Solutions, Experiences, Journeys, Messages and Campaigns related to a contracted Domain within Client's Listrak Account.

IMPLEMENTATION SERVICES

OVERVIEW

Listrak “Implementation Services” is defined as: Client contracting Listrak through a Sales Order Form (“SOF”) for Listrak to provide professional services to help Client adopt or integrate Listrak platform contracted software to support Client’s relevant business operations.

This document details the methods and extent of Listrak and Client responsibilities and deliverables (“Scope”) related to Implementation Services.

- **Implementation Service Types:**
  - “Onboarding” refers to Implementation Services associated with Listrak creating Client’s initial Listrak Account or Listrak adding a new Channel or Domain to Client’s existing Listrak Account.
  - “Add-On” refers to Implementation Services associated with Listrak expanding the Listrak software for a Domain within Client’s existing Listrak Account.
  - “Replatform” refers to Implementation Services associated with Listrak updating a Domain within Client’s existing Listrak Account to operate with Client’s new website platform and is not included in this document. A Replatform requires a separate SOF, which will include the Replatform Scope.
- **Implementation Service Levels:** Within this document and Client’s SOF a service level identifier (e.g., Silver, Gold, Platinum) may be used to differentiate and clarify the Scope of Implementation Services.
- **Implementation Packages**: During Onboarding, the extent of Client’s contracted functionality level of the Listrak platform is identified in the SOF through a particular software “Suite” (e.g., Professional Suite, Enterprise Suite, Shopify Growth Suite). Given a Suite includes multiple and varied implementation requirements, the Implementation Services for a Suite is grouped under an “Implementation Package” which can be further refined with an Implementation Service Level (e.g., Gold Implementation Package).
- **Changes or Additions**: Client understands any work, task, requirement or deliverable Client wishes Listrak to perform outside or beyond the Scope associated with Client’s contracted Implementation Service Type, Implementation Service Level, Implementation Package, or previously agreed Scope: 1) will be subject to Listrak platform functionality at that time; 2) will require the change or addition, including any associated fees, be memorialized through an amendment to Client’s original SOF, or through a new SOF; and 3) may change client responsibilities, deliverables, and project timelines.

GENERAL, TECHNICAL & DESIGN IMPLEMENTATION

RESOURCES & COMMUNICATION

- **Resources:** Under any SOF including Implementation Services, a Listrak Onboarding Manager, or equivalent subject matter expert, will be assigned to serve as Client’s single point of contact throughout the delivery of the Implementation Services. Where and when applicable, the Onboarding Manager will collaborate with a cross-functional group of Listrak subject matter experts (e.g., Deliverability Analysts, Mobile Operations Specialists, Project Managers, Integration Consultants, Graphic Designers, Front-End-Developers, Implementation Specialists, Quality Analysts) in executing and delivering implementation requirements according to Scope.
- **Communication**: During the delivery of Implementation Services, email and securely shared forms, documents and file repositories will serve as the primary form of communication between Listrak and Client. At Listrak’s discretion, video conferencing software may be used for recurring meetings or when higher levels of visual and group collaboration are needed. Other communication methods, including

dedicated Microsoft Teams/Slack Channel between Listrak and the Client, or phone calls or text messaging to a Listrak employee's personal mobile device, are out of Scope.

ACCOUNT CONFIGURATION

- **Account Provisioning:** Under any SOF that creates Client's initial Listrak Account or adds a new Domain to Client's existing Listrak Account, Listrak will provision Client's Listrak Account (if applicable), and create the Domain-specific Listrak Merchant ID required to operate Client's Listrak Integration, standard and contracted Listrak platform functionality.
- **Account Structure:** Under any SOF that creates Client's initial Listrak Account or adds a new Domain to Client's existing Listrak Account, Listrak will consult Client to determine the most appropriate Listrak Account structure to align with Client's business needs before adding the Domain to Client's Listrak Account.
- **Account Owner & Users:** Under any SOF that creates Client's initial Listrak Account, Listrak will consult Client to determine the most appropriate contact to be assigned as the Listrak Account owner. Client is responsible for adding and maintaining all Domain-specific, non-Listrak users in Client's Listrak Account.

LISTRAK INTEGRATION

- **Documentation & Support:** Under any SOF including Implementation Services, Listrak will provide Client with the Listrak Merchant ID (if applicable), along with the required Listrak Integration documentation (e.g. JavaScript or Listrak Module) needed for Client to properly integrate Client's website with the Listrak platform to successfully operate contracted services included in Client's Listrak Program. A Listrak Onboarding Manager, Integration Consultant, or equivalent subject matter expert will provide up to two (2) hours of consultation services to assist Client in understanding Listrak Integration requirements, standards, and best practices.
- **Single Listrak Environment:** Client understands a contracted Domain within their Listrak Account operates in a single, production environment in the Listrak platform and that any additional Accounts or environment in Listrak (e.g., test Merchant ID; Listrak sandbox Account; Listrak demo Account, Listrak staging environment) are not part of Listrak standard functionality and are out of Scope.
- **Client-Side Installation, Development & Deployment**: Client is responsible for the installation and deployment of any Listrak Integrations or Listrak-related code operating in the Client's development/staging environment and/or production environment to support Client's Listrak Program, including, but not limited to: the construction, formatting and delivery of flat files, REST API data feeds, and REST API Integrations required to send Listrak Transactional Messages.
- **Testing & Validation:** For Client's Listrak Integration, Listrak will perform up to two (2) rounds of front-end testing and two (2) rounds of data validation in the Listrak platform to ensure Listrak technical Integrations and Listrak data Integrations are properly configured. Listrak will communicate any identified issues to Client and Client will be responsible for making any related updates/fixes in systems outside the Listrak platform.
- **Client Environments:** Client's systems typically include a development and/or staging environment and a production environment. Listrak strongly recommends Client first integrate on Client's staging environment and allow Listrak access to Client's staging environment to improve Listrak's ability to test, validate and assist Client with fixing any technical or data issues in advance of Client moving Listrak Integration to Client's production environment. Client understands foregoing integrating and testing on a staging environment may result in limiting testing opportunities, requiring unnecessary production revisions, and/or prolonging or delaying the final validation of Client's Listrak Integration. If Client is operating in more than one development environment, Listrak will perform validation on the environment that is most in parity with the production environment.

- **Data Accuracy:** Client will be responsible for ensuring the correct format and accuracy of data being sent to Listrak. Listrak is not liable for any consequences resulting from inaccurate or incomplete data provided by the Client**.** Client also understands the Listrak platform is not intended to be used for data hygiene or data cleansing.
- **Listrak Integration Exclusions:** The following tasks related to Listrak Integrations are all out of Scope: Listrak making direct development or code changes within Client's systems; Listrak managing or negotiating with Client's third-party vendors; Listrak developing customized or Client-specific Listrak Integrations or middleware; and Listrak making modifications to shared functionality within existing Listrak Integrations that fall outside the Listrak roadmap.

THIRD-PARTY INTEGRATIONS

- **Third-Party Integration Support:** Within the ecosystem of technology, platform and agency partners that can seamlessly connect to the Listrak platform, Client can enlist Listrak to help configure a Third-Party Integration. The level of Third-Party Integration support Listrak can provide will depend on the method used to connect Listrak and the Third-Party Integration:
    - Method 1: Client will rely on the third-party to manage the connection of the third-party system to Client's Listrak Program, with Listrak providing initial instructions and some assistance to help Client validate the Integration is working properly.
    - Method 2: Client will rely on Listrak to manage the connection of the third-party system to Client's Listrak Program and validate the Integration is working properly.
- **Implementation as part of Onboarding:** A Listrak Onboarding Manager, or equivalent subject matter expert will assist Client in configuring, connecting, and validating up to five (5) Third-Party Integrations.
    - Listrak will provide guidance to Client on recommended approach for any Campaign related to Third-Party Integrations. Any creation of Journeys or Messages specifically related to Third-Party Integration is Client's responsibility and out of Scope.
- **Implementation as an Add-On:** As part of a SOF for the addition of a Third-Party Integration to Client's Listrak Program, a Listrak Integration Consultant, or equivalent subject matter expert will provide up to four (4) hours of technical assistance in configuring, connecting and validation one (1) Third-Party Integration.
    - Listrak will provide guidance to Client on recommended approach for any Journeys, Messages or Message content related to Third-Party Integrations. Any creation of Journeys or Messages specifically related to Third-Party Integration is Client's responsibility and out of Scope, unless specifically included in an applicable SOF.

DESIGN

- **Branding Assets**: Under any SOF for Implementation Services including design, Client will provide Listrak with Client's branding assets (e.g. hi-res logo, fonts, lifestyle or product imagery, brand copy, visual guidelines, style guidelines, etc.…), and Listrak will make every effort to produce a cohesive visual aesthetic based on the assets provided. The creation or updating of any Client's branding, visual, or digital style guide by Listrak is out of Scope.
- **Fonts:** If Client requires custom fonts that are not Listrak system fonts or available through Google fonts, Client will supply the custom font files (TTF, WOFF, or WOFF2) to Listrak; or supply any number of Adobe Project IDs that house respective Adobe Fonts. Client understands if a Listrak Solution does not allow the use custom fonts, Listrak will use the closest matching system font available.
- **Specialized Assets:** Advanced photo manipulations and animations by Listrak are out of Scope. If desired, Client must provide such animations, GIFs, other custom images/graphics to Listrak.

- **Client-Provided Design:** The ability or extent to which Listrak will use a Client-provided Experience or Message design ("Client-provided design") will depend on Client's contracted Implementation Service Level. For any Client-provided design, Client will supply Listrak with all final design and content assets for desktop view in layered Photoshop, XD, or Figma format, along with details for each Message outlining execution elements such as links, subject line, preheader, etc. All Client-provided designs are assumed to be 100% correct and final. Listrak will use Client-provided design to build responsive emails in Composer or HTML according to Implementation Service Level, final creative assets, and Client preference. If Listrak determines Client-provided design is not compatible with responsive layouts or Composer, or requires edits, Client is responsible for making revisions and adjustments and resubmitting new creative to Listrak prior to Listrak proceeding with proofing or Message design.
- **Dynamic Content:** Dynamic content is Listrak platform functionality that uses Listrak segmentation criteria to display or suppress email content based on an individual Contact's profile. While Dynamic Content can help personalize Email Messages, excessive, unnecessary or overuse of Dynamic Content in an Email Message has the potential to impact the speed of message deployment. For that reason, Listrak recommends dynamic content be reserved only for email Messages where the use is critically necessary to meet Client's legal or compliance requirements. If dynamic content is used in an email Message, Listrak recommends the total number of dynamic content variations (the number of dynamic content blocks, multiplied by the number of variations within the blocks) be the lowest number possible to achieve the desired result, and ideally total no more than 20 (twenty). For example: a Message containing 4 dynamic content blocks with 5 variations in each block, is within the recommended allowance (4x5=20); or a Message containing 2 dynamic content blocks with 10 variations in each block is within the recommended allowance (2x10=20). However, a Message containing 5 dynamic content blocks with 8 variations in each block would exceed the recommended allowance (5x8=40).
- **Proofing & Approvals:** Under any Implementation Service Level where Listrak is producing designs, Listrak will use digital proofing software to provide Client with up to two (2) rounds of design feedback. Under any Implementation Service Level where Listrak is using Client-provided design, Listrak will use digital proofing software to provide Client with one (1) round of design feedback (as feedback should be minor or unnecessary when using Client-provided design). Listrak typically asks for Client feedback on any digital proof be provided within 48 hours. Once Client approves digital proofs, Listrak will proceed with building the Campaign. Any changes requested by Client after proof approval can be made by Client after the Campaign is launched by Listrak. If Client fails to provide design feedback in a timely fashion, or if the proofing and approval process exceeds the allotted rounds of Client feedback, Client understands it could delay the launch of the Campaign and/or may require Listrak and Client agree to a separate SOF to adjust the Implementation Service Level, Implementation Package and/or cover unexpected or additional design fees.
- **Testing & Launch:** After building out any Campaign according to the approved proofs, Listrak will conduct internal quality assurance testing, validating acceptable form, functionality, and rendering across a selection of the most prevalent devices, email clients and browsers. Upon Listrak internal approval, Listrak will launch the Campaign per the scheduled launch date mutually agreed to between Listrak and Client. If Client wishes to do Client-review or make additional edits between Listrak internal approval and the scheduled launch date, Client can do so with the understanding Client assumes responsibility for any final testing and launch.
- **Post Launch:** If Client wishes to enlist Listrak to modify or optimize a previously launched Campaign, Client understands it may be counted toward Client's contracted service level or require a separate SOF.
- **Broadcast Marketing Design:** Unless specifically contracted under a dedicated, custom SOF, Listrak is not responsible for designing, building, updating, testing, or deploying Broadcast Messages sent as part of Client's daily, promotional or seasonal activities.
- **Design Service Levels:**

- Silver: Client or Client's designated third-party will be responsible for designing, building, testing, and launching all campaigns in the Listrak platform. Listrak will provision Client's Listrak Account with any applicable Listrak email Message or Journey Hub templates and Client will be eligible to receive up to two (2) hours of virtual training from a Listrak subject matter expert on Listrak template usage, design and testing best-practices.
- Gold: Listrak will leverage Client-provided branding assets, Client's selection from Listrak templates, and standard Listrak Composer drag-and-drop design functionality to build all in-Scope Experiences, Messages, and Campaigns. In cases where the Scope of a Standard Journey includes multiple Messages, Listrak will adjust key elements to differentiate the Messages (e.g., subject line, headline, body copy), but the overall design layout, structure and aesthetic will stay the same from Message to Message. Listrak design of any in-Scope email Messages outside Standard Journeys, email Messages used in Custom Journeys or email Transactional Messages will be based on Client's generic email Message template and/or Listrak standard design best-practices. Fully custom Listrak design, Listrak use of Client-provided designs, use of custom HTML components in Composer, and email Messages designed fully in HTML are out of Scope.
- Shopify Growth Suite: Design service level will be equivalent to Gold Implementation.
- Platinum: Listrak will create custom designs and/or leverage Client-provided designs to build in-Scope Experiences, Messages and campaigns using existing Listrak platform functionality. Email Messages may be built using Listrak Composer and/or HTML.

PROMOTIONS & COUPON CODES

- **Advanced Promotion Logic:** During Onboarding, the use different promotional strategies or Coupon Codes in a single Journey that may require split logic, A/B testing or separate messages is out of Scope.
- **Promotion Strategy:** Listrak will advise Client on recommended best-practices for Coupon Code usage in Messages. Client has final decision on Coupon Code inclusion or exclusion for in-Scope Messages.
- **Coupon Codes in Journey Hub:** Coupon Codes assigned by Journey Hub, to a Contact in a specific Journey, can be used in Messages to the Contact that are sent in that specific Journey. Upon the Contact exiting that specific Journey, any Coupon Codes associated to that specific Journey are no longer available. Any process to permanently "write" a Journey Hub-assigned Coupon Code to a profile field on the Contact's record is out of Scope.
- **Coupon Code Creation & Management:** The Listrak platform does not create or generate Coupon Codes. For any Coupon Codes used in Client's Listrak Program, Client is responsible for: configuring, testing, managing and extracting Coupon Codes from Client's website or business systems; uploading, replenishing and maintaining any Client Coupon Codes held within and distributed by the Listrak platform; and if applicable, managing any Shopify Price Rules used in Client's Listrak Account through Client's Listrak Integration with Shopify.
- **Coupon Code Redemption Tracking:** The Listrak platform and Client's Listrak Integration do not keep track of Coupon Code redemptions, nor is Listrak responsible for Coupon Code performance.

CHANNEL IMPLEMENTATION

EMAIL CHANNEL

Under any SOF that creates Client's initial Listrak Account or adds a new Domain to Client's existing Listrak Account, and includes the Email Channel, the following Scope applies to each contracted Domain:

- **Master List Set Up & Initial Import:** Listrak will create and configure Client's Master List for email and import Client's existing and legacy Master List Subscribers and Unsubscribers and relevant data from a

Client-provided list matching Listrak's import criteria. Except for any contact data synchs created through Client's Listrak Integration, Listrak accessing third-party systems to generate or compile Contact or Subscriber data, along with Listrak performing data hygiene on Client's data is out of Scope.

- **Branding Settings:** Listrak will provide guidance to Client in branding Email lists in Client's Listrak Account, including assisting Client's decision on an appropriate sender name and from address. Listrak will create a proper domain alias, bounce domain, SFP record, DKIM record, and DMARC record and provide to Client. Client is responsible for making any necessary updates to the DNS records for Client's Domain.
- **IP Warm-Up Plan:** Listrak will use existing engagement data included in the Client-provided list, along with Client's Broadcast Email sending circulation and frequency, to develop a custom Broadcast Email IP Warm-Up plan for Client. Listrak will create, and share with Client, Subscribers to incrementally include in Email Broadcast Messages sent through the Listrak platform, and the Subscribers to simultaneously and incrementally exclude from Email Broadcast Messages sent through Client's non-Listrak Email platform. Client is responsible for the creation and scheduled deployment of all Broadcast Messages, sent from any Email platform, and the management and synchronization of subscription statuses in Listrak for any Contacts also held in any system outside the Listrak platform.
- **Subscription Points:** Listrak will assist Client in configuring up to ten (10) Email acquisition sources at Client's website ("Subscription Points") to capture Email Master List Subscribers. Subscription point configuration and capture method (i.e., Listrak Integration, JavaScript, API) will vary based on Client's website platform, systems, and Listrak Integration.
- **Basic Broadcast Email Template:** If requested by Client, Listrak will create one (1) basic Broadcast Email Template, built in Listrak Composer, and comprised of a generic header, footer, hero/main content area, and top categories banner.
- **Re-Engagement Custom Journey:** If Implementation Services under a SOF are associated with Onboarding a Listrak Suite, subject to Client's contracted Implementation Service Level, Listrak will advise Client on how to build, or build for Client, a Re-Engagement Custom Journey. Listrak will consult with Client to determine the engagement criteria for the Segment Entry Event (e.g., Subscribed 90 days ago and never clicked). Listrak Design Support will align with contracted Implementation Service Level and the Scope below:
    - <u>Silver:</u> Message design and build, and Journey build by Client. Listrak recommends Client build one (1) "Re-Engagement" Custom Journey, using a Segment Entry Event matching Client's re-engagement criteria, with at least one (1) Message per contracted Channel within the Journey.
    - <u>Gold:</u> Listrak templated build of one (1) "Re-Engagement" Custom Journey, using a Segment Entry Event matching Client's re-engagement criteria, with one (1) templated Message per contracted Channel.
    - <u>Platinum:</u> Listrak templated build of one (1) "Re-Engagement" Custom Journey, using a Segment Entry Event matching Client's re-engagement criteria, with one (1) custom Message per contracted Channel.
- **All Other Email Program Components:** Any other Email-related Implementation Services provided by Listrak under Client's SOF will follow the Email-specific Scope outlined in the "Solutions, Services and Campaigns Scope" section of this document, based on: Client's contracted Listrak Solutions; and the contracted Implementation Service Type, Implementation Service Level or Implementation Service Package.

SMS CHANNEL

Under any SOF that creates Client's initial Listrak Account or adds a new Domain to Client's existing Listrak Account, and includes the SMS Channel, the following Scope applies to each contracted Sender Code:

- **Preparation for Sender Code Provisioning or Migration:**

- Compliance Audit: Prior to provisioning a new Sender Code or initiating the migration of an existing Sender Code, Listrak will conduct a SMS compliance audit of Client's website, and if applicable, Client's existing SMS program and Subscribers. Listrak will share the audit results with Client, along with any changes or clarifications needed to meet SMS compliance requirement and proceed with provisioning or migrating a Sender Code (e.g., updating mobile compliance language at Client's Privacy Policy or Terms and Conditions page at Client's website, confirming the authenticity of existing SMS subscribers, etc.…).
    - Client is responsible for reviewing compliance audit results and making the final decision on any recommended changes.
- Brand Vetting & Registry: Prior to provisioning a new Sender Code or initiating the migration of an existing Sender Code registered in the United States, Listrak will work with client to gather the required information needed to submit, on behalf of Client, the documents required to complete the Registry Vetting Process, a mandatory compliance step overseen by the CTIA (Cellular Telecommunications Industry Association designed to ensure all entities using Short Codes for messaging are legitimate, compliant and traceable.
    - Client is responsible for providing Listrak with the required details (e.g., Client's W9, FEIN/Federal Tax ID, physical mailing address, etc.), as well as designating point of contact at Client's business to verify details about Client's business to an external brand vetting partner.

- **Sender Code Provisioning or Migration:**
    - Listrak will work with Client to gather the required information needed to submit, on behalf of Client, the documents required to provision a new Sender Code or migrate Client's existing Sender Code, in the associated country, for the available and applicable contracted SMS Channel services (e.g. Marketing SMS, MMS and/or Transactional SMS, MMS).
        - For a Sender Code migration, Listrak will draft a Letter of Authorization, to be signed by Client, to determine if Client's Sender Code is associated with Listrak's SMS aggregator. If the Sender Code is not associated with Listrak's SMS aggregator, Listrak will work with Client to gather the required information needed to submit, on behalf of Client, a Migration Letter signed by Client, to initiate the release of the Sender Code from the current Sender Code lease holder.
        - Client understands approval or migration timelines are subject to factors outside Listrak's control such as: seasonality; carrier approval; and, if appliable, the current Sender Code lease holder.
        - Client understands that outside of Listrak, the range, deployment and delivery of SMS Messages is subject to the type of Sender Code, the prevailing laws in the country where the SMS Messages are being sent, and aggregator and carrier allowances and capabilities.
- **Compliance Training:** Before Client's Sender Code can go live in the Listrak platform, Client is required to attend a Listrak SMS compliance training. If Client's Sender Code is categorized as "SHAFT" (i.e., related to selling products within the categories of Sex, Hate, Alcohol, Firearms and Tobacco), Client must attend a live, virtual Listrak SHAFT-specific SMS compliance training. For all other Sender Codes, Client must attend a pre-recorded, virtual Listrak SMS compliance training. Client is responsible for ensuring its marketing program complies will all Federal and State laws.
- **System Messages:** Listrak will use templated, compliant language to configure SMS System Messages in the Listrak platform (e.g., Stop, Help, Info, Failure, Invalid Reply, etc.) for Client's Sender Code.
- **Contact Card:** A Contact Card is a Virtual Contact File (.vcf or vCard), which is a standard file format for storing contact information for a person or business. Sending SMS Subscribers a Contact Card (as an MMS Message) and encouraging SMS Subscribers to create/save the contact can help Client with branding Client's SMS Subscriber experience. By default, Listrak will create one (1) Contact Card for Client's Sender Code and incorporate the associated MMS message in the List Subscription Standard Journey.

- **Quiet Hours:** Quiet Hours is a SMS Message delivery setting that restricts SMS Message sends to a specific time. For any SMS Message being added to Client's Listrak Program by Listrak, at the time of implementation, Listrak will apply the recommended best-practice for quiet hours.
- **Message Format:** By default, all SMS Messages created by Listrak for Client will be SMS/Text messages, except in cases where the only acceptable format is an MMS Message (e.g., "Contact Card" Message). Listrak creation of MMS Messages is out of Scope but remain available to Client.
- **Master List Set Up & Initial Import:**
  - For any approved or migrated Sender Code, Listrak will create and configure Client's SMS Master List. If Client's Sender Codes is non categorized as SHAFT, Listrak will configure Client's SMS Master List to use a "Double-Opt In," which requires the contact provide prior, expressed, written consent before being subscribed to the Sender Code. If Client's Sender Code is categorized as SHAFT, Listrak will configure Client's SMS Master List to use an "Age Gate," which requires the contact provide a date of birth that meets a specific age threshold before being subscribed to the Sender Code.
  - If Client is migrating an existing SMS program, Client will provide Listrak with a SMS Subscriber file within 48 hours' after sending a "Sunset Message" (i.e., the last message sent by Client in Client's previous SMS messaging system). Within 7 days, Listrak will import compliant Subscribers into Client's SMS Master List, along with any relevant data from a Client-provided list matching Listrak's import criteria, and Client will send a "Sunrise Message" (i.e., the first message sent by Client through the Listrak platform).
  - If Client wishes to import any SMS Contacts identified by the Listrak compliance audit as "non-compliant Subscribers," Client will be required to sign a waiver indicating Client's decision to import the non-compliant Subscribers is being done against Listrak's recommendation.
  - Except for any contact data synchs created through Client's Listrak Integration, Listrak accessing third-party systems to generate or compile Contact or Subscriber data or Listrak performing data hygiene on Client's data is out of Scope.
- **Subscription Points:** Listrak will assist Client in configuring up to six (6) SMS acquisition sources at Client's website ("Subscription Points") to capture SMS Master List Subscribers. Subscription point configuration and capture method (i.e., Listrak Integration, JavaScript, API) will vary based on Client's website platform, systems, and Listrak Integration.
- **Branded Links:** The Listrak platform will automatically shorten URLs used in SMS Messages to follow a Listrak platform standard format such as: https://ltrk.co/[unique-link-value]. If Client wishes to rebrand the ltrk.co portion of the shortened URL used in Client's SMS Messages, Listrak will provide guidance to Client in how to configure the required CNAME subdomain record in Client's DNS Host. Client is responsible for making any necessary updates to the DNS records for Client's Domain and understands the character count of Client-branded links in SMS Messages may be greater than the Listrak platform standard format.
- **Keyword Campaigns:** Keyword Campaigns provide Contacts with an alternate way to subscribe to Client's SMS Sender Code by texting a specific word or phrase to the Sender Code to initiate the subscription. Listrak will consult with Client to determine up to five (5) relevant Keyword Campaigns and Listrak will use templated, compliant language to build one (1) SMS Message per Keyword Campaign.
- **Monthly, Recurring SMS Message:** If Client's Sender Code is provisioned and approved for promotional marketing purposes, Listrak will create one (1) templated recurring SMS Message linking to Client's website and configured to send monthly to all SMS Master List Subscribers on a date selected by Client.
- **Join SMS Email Banner & SMS Subscribe Landing Page:** If Client is adding the SMS Channel to a Domain also operating the Email Channel in Listrak, and Client's Sender Code is provisioned and approved for promotional marketing purposes, Listrak will create one (1) templated Join SMS Banner in Listrak

Composer that links to a templated, Listrak-created SMS Subscribe Landing Page. Client is responsible for incorporating the Join SMS Banner into any Email Messages.

- **Transactional SMS:** If Client's Sender Code is provisioned and approved for Transactional SMS Messages, Client may send SMS Transactional Messages through the Listrak Rest API, or, if applicable, selected SMS Transactional Messages through Client's Listrak Shopify Integration and Journey Hub.
    - Listrak will create and configure Client's SMS Transactional Message List (if needed).
    - For SMS Transactional Messages to be sent through the Listrak REST API, Listrak will create up to eight (8) SMS Transactional Message "Shells" and provide Client with suggested, default copy for each message. Client is responsible for: the creation of any additional SMS Transactional Messages; creation or modification of SMS Transactional Message copy; adding SMS Transactional Message tracking parameters into the Listrak platform; generating any required SMS REST API Integration credentials in the Listrak platform; creating the required REST API call, including Message content and links; and all testing and validation of SMS Transactional Messages.
    - If applicable, for SMS Transactional Messages able to be sent through Client's Listrak Shopify Integration, Listrak will create each available Transactional Message Journey in Journey Hub and the default copy for each appliable SMS Transactional Message. Client is responsible for: any modification of SMS Transactional Message copy; adding SMS Transactional Message tracking parameters into the Listrak platform; and all testing and validation of SMS Transactional Journeys and Messages.
- **All Other SMS Program Components:** Any other SMS-related Implementation Services provided by Listrak under Client's SOF will follow the SMS-specific Scope outlined in the "Solutions, Services and Campaigns Scope" section of this document, based on: the type of SMS Messages permitted on Client's Sender Code; Client's contacted Listrak Solutions; and the contracted Implementation Service Type, Implementation Service Level or Implementation Service Package.
    - <u>Amending Email Experiences:</u> If Client is adding the SMS Channel to a Domain already operating the Email Channel in Listrak and using active Experiences for Email acquisition, Listrak will add an SMS acquisition step in up to three (3) active acquisition Experiences. If Client's Sender Code is categorized as SHAFT, Listrak will consult Client on any necessary updates required to meet SHAFT compliance.
    - <u>Amending Email Journeys:</u> If Client is adding the SMS Channel to a Domain already operating the Email Channel in Listrak and using Standard Journeys, Listrak will add SMS Messages to active Standard Journeys and Custom Journeys included in Onboarding Scope. For any Standard Journey or Custom Journey included in Onboarding Scope that are not active in Client's Listrak Program, Listrak will create the Standard Journey or Custom Journey with the associated number of in Scope SMS Messages. If Client's Sender Code is categorized as SHAFT, Listrak will consult Client on any necessary updates to Journeys to meet SHAFT compliance (e.g., filtering out specific types of products). Unless otherwise included in the SOF, the addition, creation, or modification of Email Messages in Standard Journeys or Custom Journeys is out of Scope.

<u>SOLUTION & CAMPAIGN IMPLEMENTATION</u>

ADVANCED SEGMENTATION PACKAGE

- **Definition:** No longer included or required if Client's Listrak Account was created after January 1, 2025, Advanced Segmentation Package (ASP) is a Data-Dependent Solution available to Clients operating on Listrak's legacy/classic platform. ASP synchronizes and automatically writes Customer data in up to fifteen (15) purchase fields and Customer browse activity data in up to nine (9) profile fields under a field group labeled "FA Customer Metrics" on the Master List for a single Domain in Client's Listrak Program to create additional segmentation opportunities.

- Purchase Fields: Average Order Value; Average Reorder Days; Customer Flag; First Order Date; Gender; Last Order Date; Order Count; Projected Order Date; Purchase Sources; Recent Items Purchased; Recent Items Purchased Overflow; Spent One Year; Spent Two Year; Spent Three Year; Spent Total
- Browse Fields: Last Browsed Brand; Last Browsed Category; Last Browsed Subcategory; Last Site Visit; Most Browsed Brand; Most Browsed Category; Most Browsed Subcategory; Recent Items Browsed; Recent Items Browsed Overflow
  NOTE: Browse fields require Client's Listrak Program be contracted for Browse Abandonment.

- **Eligibility:** Included via an applicable Add-On SOF if Client's Listrak Account is operating on Listrak's legacy/classic platform. Not required or applicable on Listrak Accounts created after January 1, 2025.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

ALERT SUITE

"Alert Suite" is a group of Listrak Solutions (Back In Stock; Low Inventory; and Price Drop) that send specialized product notification Messages to eligible Contacts via Standard Journeys.

BACK IN STOCK ALERT

- **Definition:** Part of Listrak Alert Suite, Back In Stock Alert, is a Data-Dependent Solution that triggers eligible Subscribers into a Standard Journey to receive Triggered Messages when the inventory level of an eligible product meets Client's pre-defined quantity threshold set in the Listrak platform.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Subscription Method: Client to choose one (1) of the subscription methods below.

  - Implicit Subscription: Subscribers created through identifiable visitors browsing out of stock products at Client's website are eligible to enter one (1) "Back In Stock Notification" Standard Journey to receive Messages when the inventory level in the Listrak platform for the eligible product matches the back in stock criteria configured in the Listrak platform.
  - Explicit Subscription: Subscribers created through a Client-managed sign-up form for eligible products at Client's website are eligible to enter one (1) "Sign Up Notification" Standard Journey to confirm the act of explicitly signing up to receive a back in stock notification, and one (1) "Back In Stock Notification" Standard Journey to be alerted when the product is back in stock. Two other optional Standard Journeys may be included, subject to Client's Listrak Integration, sending the required product data to the Listrak platform: an "Expiration Notification" Standard Journey to confirm if a product is still out of stock after a pre-defined period; and a "Discontinued Notification" Standard Journey to confirm if a product with a back in stock request has been discontinued. Messages are sent based on the Subscriber signing up to receive a Back In Stock Alert for the eligible product, regardless of the period between sign up and when the product comes back in stock.

    Client simultaneously operating both types of Subscription methods under one Domain is out of Scope.

  Journeys & Messages: One (1) Standard Journey (if implicit subscription method), or up to four (4) Standard Journeys (if explicit subscription method) can be added to Client's Listrak Program. Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Silver: Message design and build, and Standard Journey build by Client. Listrak recommends Client send at least one (1) Triggered Message per contracted Channel within each Journey.

- Gold: Listrak templated build of one (1) “Back In Stock Notification” Standard Journey (if implicit subscription method), or a minimum of one (1) “Back In Stock Notification” Standard Journey and one (1) “Sign Up Notification” Standard Journey (if explicit subscription method). One (1) “Expiration Notification” Standard Journey and one (1) “Discontinued Notification” Standard Journey are optional and subject to the accuracy of Client providing the required product data. Listrak templated design of one (1) Triggered Message per contracted Channel within each Journey.
- Platinum: Listrak custom build of one (1) “Back In Stock Notification” Standard Journey (if implicit subscription method), or a minimum of one (1) “Back In Stock Notification” Standard Journey and one (1) “Sign Up Notification” Standard Journey (if explicit subscription method). One (1) “Expiration Notification” Standard Journey and one (1) “Discontinued Notification” Standard Journey are optional and subject to the accuracy of Client providing the required product data. Listrak custom design or Listrak use of Client-provided design of one (1) Triggered Message per contracted Channel within each Journey.

Other Considerations & Client Responsibilities:

- The quantity and deployment of Back In Stock Alert Messages is dependent on Client’s Listrak Integration properly identifying and subscribing eligible website visitors, and regularly updating inventory levels, discontinued status, and other relevant product data.
- Client understands Back In Stock Alert settings in the Listrak platform universally apply to all products for the contracted Domain and that individual product settings are not available.
- Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client’s Listrak data.

LOW INVENTORY ALERT

- **Definition:** Part of Listrak Alert Suite, Low Inventory Alert is a Data-Dependent Solution that triggers eligible Contacts into a Standard Journey to receive Triggered Messages when the inventory level of a product, browsed or carted within an eligible look back window, drops below Client’s pre-defined quantity threshold set in the Listrak platform.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Journey & Messages: One (1) “Low Inventory” Standard Journey can be added to Client’s Listrak Program. Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Silver: Message design and build, and Standard Journey build by Client. Listrak recommends Client send at least one (1) Triggered Message per contracted Channel.
  - Gold: Listrak templated build of one (1) “Low Inventory” Standard Journey, and Listrak templated design of one (1) Triggered Message per contracted Channel.
  - Platinum: Listrak custom build of one (1) “Low Inventory” Standard Journey. Listrak custom design or Listrak use of Client-provided design of one (1) Triggered Message per contracted Channel.

  Other Considerations & Client Responsibilities:

  - The quantity and deployment of Low Inventory Alert Messages is dependent on Client’s Listrak Integration properly identifying and subscribing eligible website visitors and regularly updating inventory levels and other relevant product data.
  - Client understands Low Inventory Alert settings in the Listrak platform universally apply to all products for the contracted Domain and that individual product settings are not available.

- Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client's Listrak data.

PRICE DROP ALERT

- **Definition:** Part of Listrak Alert Suite, Price Drop Alert is a Data-Dependent Solution that triggers eligible Contacts into Standard Journey to receive Triggered Messages when the price of a product, browsed or carted within an eligible look back window, drops below Client's pre-defined dollar or percentage threshold set in the Listrak platform.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Journey & Messages: One (1) "Price Drop" Standard Journey can be included in Client's Listrak Program. Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Silver: Message design and build, and Standard Journey build by Client. Listrak recommends Client send at least one (1) Triggered Message per contracted Channel.
  - Gold: Listrak templated build of one (1) "Price Drop" Standard Journey, and Listrak templated design of one (1) Triggered Message per contracted Channel.
  - Platinum: Listrak custom build of one (1) "Price Drop" Standard Journey. Listrak custom design or Listrak use of Client-provided design of one (1) Triggered Message per contracted Channel.

  Other Considerations & Client Responsibilities:

  - The quantity and deployment of Price Drop Alert Messages is dependent on Client's Listrak Integration properly identifying and subscribing eligible website visitors and regularly updating product price, product sale price and other relevant product data.
  - Client understands Price Drop Alert settings in the Listrak platform universally apply to all products for the contracted Domain and that individual product settings are not available.
  - Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client's Listrak data.

BIRTHDAY CAMPAIGN (DATE-BASED CAMPAIGN)

- **Definition:** A Birthday Campaign uses a combination of Listrak functionality to capture and save a Subscriber's birthday (a date formatted as MM/DD/YYYY) to a standard Listrak profile field, and using a Segment Entry Event, trigger eligible Subscribers into Custom Journeys to receive Triggered Messages based on the value present in the Subscriber's birthday profile field.
  - Alternate Campaigns: While Birthday is the most common date-based campaign, any other profile field Client is capturing as a date formatted as MM/DD/YYYY can be used to execute a Date-Based Campaign in the same manner and Scope as the Birthday Campaign defined below. (e.g., Wedding Anniversary, House Anniversary, Retirement, Due Date, etc.).
  - Date-Based Campaigns triggered by dates or data held outside a Contact profile field or using data or dates not structured in a MM/DD/YYYY format are out of Scope.
- **Eligibility:** One campaign included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Birthday Capture:

- Client's Listrak Preference Center will serve as the primary method to enable Subscribers to provide their birthday. If Client does not have a Listrak Preference Center, Listrak will use standard Listrak Landing Page functionality to build a Listrak-hosted, templated, stand-alone "Birthday Capture" Landing Page to enable Subscribers to provide their birthday in the required format.
- Any other Birthday capture methods (e.g., website forms, popups, file import, API, point of sale) are out of Scope but remain available to Client.

Journeys & Messages: Two (2) "Birthday" Custom Journeys are used to execute a Birthday Campaign:

- "Birthday Collection" Custom Journey: Subscribers are triggered into the Journey when matching the criteria of an associated, Listrak-created "Birthday Collection" Segment (Standard birthday profile field is empty; and most recent subscribe date is 30 or 60 or 90 days ago). The criteria of the "Birthday Collection" Segment ensures Subscribers without a birthday, are messaged no more than three times over 90 days, though Client may amend the criteria as desired to increase or decrease entry quantity and/or frequency. Upon entering the "Birthday Collection" Custom Journey, Subscribers will receive Triggered Messages with links to allow the Subscriber to provide their birthday via Client's Listrak Preference Center or Listrak-hosted "Birthday Capture" Landing Page.
  - Other Birthday Collection methods and messages are out of Scope but remain available to Client.
- "Birthday Celebration" Custom Journey: Subscribers are triggered into a Custom Journey when matching the criteria of the associated, Listrak-created "Birthday Celebration" Segment (Today is equal to the Month and Day of the date in the standard birthday field OR Today is X number of days before the Month and Day of the date in the standard birthday field.). Subscribers will receive Triggered Messages with Client's desired Birthday content.
  - Other Birthday Celebration methods and messages are out of Scope but remain available to Client.

Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

- Silver: Message design and build, and Journey build by Client. Listrak recommends Client launch a "Birthday Collection" Custom Journey and a "Birthday Celebration" Custom Journey, with at least one (1) Triggered Message per contracted Channel within each Journey.
- Gold: Listrak templated build of one (1) "Birthday Collection" Custom Journey and one (1) "Birthday Celebration" Custom Journey. Listrak templated design of one (1) Triggered Messages per contracted Channel within each Journey.
- Platinum: Listrak templated build of (1) "Birthday Collection" Custom Journey and one (1) "Birthday Celebration" Custom Journey. Listrak custom design or Listrak use of Client-provided design of one (1) Triggered Message per contracted Channel within each Journey.

Other Considerations & Client Responsibilities:

- Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client's Listrak data.

BROWSE ABANDONMENT

- **Definition:** Browse Abandonment is a Data-Dependent Solution that triggers Subscribers into Standard Journeys to receive Triggered Messages based on the Subscriber leaving Client's website before adding products to a shopping cart or completing a purchase.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

Journeys & Messages: Two (2) Browse Abandonment Standard Journeys can be included in Client's Listrak Program:

- "Product Browse Abandonment" Standard Journey: Subscribers enter the Journey if the last page viewed before abandoning Client's website was a product detail page, and specific product details (e.g., image, product title, product URL, etc.) are available to personalize the Message content in the Journey.
- "Page Browse Abandonment" Standard Journey: Subscribers enter if the last page viewed before abandoning Client's website was any page other than a product detail page.

Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

- Silver: Message design and build, and Standard Journey build by Client. Listrak recommends Client launch a "Product Browse Abandonment" Standard Journey and a "Page Browse Abandonment" Standard Journey, with at least one (1) Triggered Message per contracted Channel within each Journey.
- Gold: Listrak templated build of one (1) "Product Browse Abandonment" Standard Journey and one (1) "Page Browse Abandonment" Standard Journey. Listrak templated design of two (2) email Triggered Messages and one (1) Triggered Message for any other contracted Channel within each Journey.
- Platinum: Listrak custom build of one (1) "Product Browse Abandonment" Standard Journey and one (1) "Page Browse Abandonment" Standard Journey. Listrak custom design or Listrak use of Client-provided design of two (2) email Triggered Messages and one (1) Triggered Message for any other contracted Channel within each Journey.

Other Considerations & Client Responsibilities:

- The quantity and deployment of Browse Abandonment Messages is dependent on Client's Listrak Integration properly identifying and subscribing eligible website visitors and regularly updating relevant product data.
- Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client's Listrak data.

EMAIL MESSAGES

- **Definition and Eligibility:** Apart from Email Messages included in Onboarding, standard Solution Scope or Email Transactional Messages, Client can contract Listrak through a SOF to build or rebuild Email Messages to support Client's Listrak Program.
- **Implementation:**

NEW EMAIL MESSAGE

- Listrak Design Support will align with the contracted Implementation Service Level to create one (1) new Email Message.
- If Client's Listrak Program includes Email Product Recommendations, Listrak will create one (1) new Email Merchandise Block or insert one (1) existing Email Merchandise block into the message.
- If applicable, Listrak will insert the new Email Message into an existing Journey. Creation of a new Standard Journey or Custom Journey is out of Scope, unless specifically included in an applicable SOF.

EMAIL MESSAGE REBUILD: CONDUCTOR TO JOURNEY HUB

- Listrak will update one (1) existing Conductor Email Message to be compatible with Journey Hub functionality, with message updates being solely limited to the required changes needed to achieve Journey Hub compatibility. The complete redesign of the Message is out of Scope.
- Client understands achieving Journey Hub compatibility may require the complete removal of Message elements, or modifications to Message creative related to incompatible criteria, logic, or data structures.

- Listrak will build or update the Standard Journey or Custom Journey associated with the respective Message. The update of any active or existing Journey Hub Messages is out of Scope.
- Client understands the migration of Conductor Conversation Messages into Custom Journeys and Journey Messages may require Client modify or rebuild data imports or Integrations required to maintain functionality (e.g., file import, API, Third-Party Integration). In such cases, Listrak will consult with Client to outline the requirements. Listrak rebuild of any data imports or Integrations is out of Scope, unless specifically included in an applicable SOF.

EMAIL MESSAGE REBUILD: HTML TO COMPOSER

- Listrak will create one (1) Listrak Composer Email Message from one (1) existing Email Message designed in HTML.
- Client understands achieving a Listrak Composer Email Messages may require the complete removal, or modification of any HTML Message creative that is incompatible with Listrak Composer.
- If the Email Message being rebuilt is a Triggered Message in a Journey, Listrak will replace the applicable HTML Email Message in the Journey with the new Composer Email Message.

EXCHANGE

- **Definition:** Exchange is a Data-Dependent Solution that enables Client to synchronize Listrak audiences with Facebook/Instagram and Google. Listrak Exchange also enables Client to synchronize acquired Facebook Lead Ad Subscribers to Listrak in real-time.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and configuration guidance.

  Client Responsibilities:

  - Connecting Client's Facebook Lead Ad account, Client's Facebook Business Manager account or Client's Google Ads account with Exchange.
  - The selection, synching and ongoing creation and management of connected audiences.
  - Creative set up, budgeting, billing and payment for ads running in systems outside Listrak.
  - Creation of any List Subscription Standard Journey or Triggered Messages for Lead Ad Contacts.

EXPERIENCE BUILDER

- **Definition:** Experience Builder is a Solution that enables Client to quickly and easily, design and deploy popup Experiences using an intuitive drag-and-drop editor, a library of pre-built templates, with little to no HTML or CSS coding required. Client's SOF will specify the contracted Experience Builder software level (e.g., "Experience Builder Standard" or "Experience Builder Plus").
- **Eligibility:** Included in Onboarding any Experience Builder software level or through an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Deliverables: Listrak Design Support will align with contracted Implementation Service Level, the contracted Experience Builder software level, and the Scope below:

  - Silver:

        - **As part of Onboarding**: Listrak templated build of three (3) single- or multi-Channel subscription Experiences (Entry, Persistent Button, Exit). If Client's SOF includes a marketing SMS sender code, Listrak templated build of one (1) SMS-only subscription Experience. All Experiences subject to Client's contracted Experience Builder software level and existing Experience Builder functionality.
        - **As an Add-On:** Client responsible for design, test and launch of all Experiences.
    - Gold: Listrak templated build of three (3) single- or multi-Channel subscription Experiences (Entry, Persistent Button, Exit). If Client's SOF includes a marketing SMS sender code, Listrak templated build of one (1) SMS-only subscription Experience. All Experiences subject to Client's contracted Experience Builder software level and existing Experience Builder functionality.
    - Platinum: Listrak custom build of three (3) single- or multi-Channel subscription Experiences (Entry, Persistent Button, Exit) using Listrak custom design or Listrak use of Client-provided design. If Client's SOF includes a marketing SMS sender code, Listrak custom build of one (1) SMS-only subscription Experience using Listrak custom design or Listrak use of Client-provided design. All Experiences subject to Client's contracted Experience Builder software level and existing Experience Builder functionality.
- **Additional Experiences:** Once Experience Builder has been implemented, or during Initial Implementation of Experience Builder, Client can contract Listrak to create any number of additional Experiences beyond Scope through a separate Gold or Platinum Implementation Services SOF, with Listrak Design Support to align with contracted Implementation Package or Implementation Service Level.
    - Gold: Listrak templated build of one (1) single- or multi-Channel Experience, subject to Client's contracted Experience Builder software level and existing Experience Builder functionality.
    - Platinum: Listrak custom build of one (1) single- or multi-Channel Experience using Listrak custom design or Listrak use of Client-provided design, subject to Client's contracted Experience Builder software level and existing Experience Builder functionality.
- Experiences including SMS Acquisition: The validation, testing and launch of any Experience including any SMS acquisition step, will only proceed after Client's Sender Code has been formally approved.

INTELLIGENCE SUITE

"Intelligence Suite" is a group of AI-powered Listrak Solutions designed to provide Client with additional, automated ways to further personalize Client's Listrak Program at scale, including: AI Channel Affinity; Email Product Recommendations; Predictive Analytics; Predictive Content; and Website Product Recommendations.

Where applicable, the extent of functionality and Scope for Intelligence Suite Solutions will be subject to the Intelligence Suite level associated with the Listrak platform Suite included in Client's SOF, as stated below:

- "Intelligence Suite Plus" is included with Listrak Professional Suite or Enterprise Suite
- "Intelligence Suite Standard" is included only with Shopify Growth Suite.

AI CHANNEL AFFINITY

- **Definition:** Part of Listrak Intelligence Suite, AI Channel Affinity is a Data-Dependent Solution that provides Client with the ability to build more targeted or refined segments and leverage Journey Hub splits based on a Contact's implicitly preferred Channel.
- **Eligibility:** Included in Onboarding any Intelligence Suite or an applicable Add-On SOF under a Domain contracted for two or more Channels.
- **Implementation:** (Intelligence Suite Standard or Intelligence Suite Plus)

  Technical: Listrak Solution enablement.

Deliverables: Listrak addition of AI Channel Affinity split in up to three (3) Journeys (typically Page Browse Abandonment, Product Browse Abandonment and Shopping Cart Abandonment). Existing cross-Channel Messages will be duplicated and reordered under each split, prioritizing the delivery of the Channel-specific Message before non-Channel specific Messages. Any additional or new Messages to be created by Client or by Listrak via a separate SOF.

EMAIL PRODUCT RECOMMENDATIONS

- **Definition:** Part of Listrak Intelligence Suite, Email Product Recommendations is a Data-Dependent Solution that provides Client with functionality to customize the criteria, appearance, and insertion of highly personalized and relevant product recommendations into Messages. Algorithms used to generate product recommendations are based on machine learning, Client's preferences, and/or Message recipient's preferences, browse and purchase behaviors.
- **Eligibility:** Including in Onboarding any Intelligence Suite or through an applicable Add-On SOF.
- **Initial Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Intelligence Suite Plus:

  - Email Merchandise Block Design: Listrak templated design of three (3) email Merchandise Block Design (2-column x 1 row or 2 rows; 3-column x 1 row or 2 rows; and 4-column x 1 row or 2 rows) using the same design style and leveraging standard merchandise block functionality.
  - Recipes: Listrak templated creation of eight (8) product recommendation algorithms ("Recipes"): Top Sellers; What's New; Recent Activity; Gateway Products; Similar Products; Frequently Bought Together; Purchase This That; and Trending.
  - Email Merchandise Block Build: Listrak build of twenty (20) email Merchandise Blocks, using one (1) email Merchandise Block Design and the application of one (1) associated Recipe per email Merchandise Block as follows: Broadcast (Top Sellers); Broadcast (What's New); Broadcast (Recent Activity); Welcome (Gateway Products); Page Browse (Top Sellers); Product Browse (Similar Products); Shopping Cart Abandonment (Frequently Bought Together); Price Drop (Frequently Bought Together); Low Inventory (Frequency Bought Together); Back In Stock (Frequently Bought Together); Post Purchase (Top Sellers); Post Purchase (What's New); Post Purchase (Purchase This That); Post Purchase (Trending); Replenishment (Frequently Bought Together); Birthday (Top Sellers); Churn Prevention (Top Sellers); Loyalty (Recent Activity); Re-Engagement (Trending); Transactional (Purchase This That).
  - Merchandise Block Application: Listrak insertion of the applicable email Merchandise Block into each email Triggered Messages in the associated Standard Journey. (i.e., "Welcome (Gateway Products)" email Merchandise Block inserted into each email Welcome Message in a List Subscription Journey.)
  - Client Responsibilities: Insertion of any email Merchandise Block into email Broadcast Messages; email Triggered Messages within Custom Journeys; email Transactional Messages; or where placement and rendering of the Merchandise Block in an email Messages is done through dynamic content.
  - Recurring Recommendations Email: Listrak templated design of one (1) email Message with the main Message content consisting of six (6) to twelve (12) product recommendations, rendered through one (1) email Merchandise Block Layout using up to three (3) Recipes, scheduled to send on a recurring basis (e.g. monthly) to Client's chosen segment.

  Intelligence Suite Standard: (applicable only during Onboarding Shopify Growth Suite)

  - Merchandise Block Design: Listrak templated design of one (1) email Merchandise Block Design (2-column x 1 row or 2 rows; or 3-column x 1 row or 2 rows; or 4-column x 1 row or 2 rows) leveraging standard merchandise block functionality.

- Recipes: Listrak templated creation of two (2) product recommendation algorithms (“Recipes”): Client to choose from: Top Sellers; What’s New; Gateway Products; or Trending.
- Merchandise Block Build: Listrak build of two (2) email Merchandise Blocks, using email Merchandise Block Design and the application of one (1) different Recipe per email Merchandise Block.
- Merchandise Block Application: Listrak insertion of one (1) email Merchandise Block into each email Triggered Message in Standard Journeys. Client will choose which email Merchandise Block to use within each Standard Journey or defer to Listrak making the choice.
- Client Responsibilities: Insertion of any email Merchandise Block into email Broadcast Messages; email Triggered Messages within Custom Journeys; email Transactional Messages; or where placement and rendering of the Merchandise Block in an email Messages is done through dynamic content.
- Recurring Recommendations Email: Listrak templated design of one (1) email Message with the main Message content consisting of four (4) to eight (8) product recommendations, rendered through one (1) Merchandise Block Layout using up to two (2) Recipes, scheduled to send on a recurring basis (e.g. monthly) to Client’s chosen segment.

- **Refresh Implementation as an Add-On:**

  Requirements: Client contracted for Intelligence Suite Plus; Email Product Recommendations already enabled in Client’s Listrak Program; Client’s Listrak Integration properly sending data; and Client has completed Onboarding.

  Deliverables: Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Silver: Not Available.
  - Gold:
    - Email Merchandise Block Design: Listrak templated design of three (3) email Merchandise Block Design (2-column x 1 row or 2 rows; 3-column x 1 row or 2 rows; and 4-column x 1 row or 2 rows) using the same design style and leveraging standard merchandise block functionality.
    - Recipes: Listrak templated creation of eight (8) product recommendation algorithms (“Recipes”): Top Sellers; What’s New; Recent Activity; Gateway Products; Similar Products; Frequently Bought Together; Purchase This That; and Trending.
    - Email Merchandise Block Build: Listrak build of twenty (20) email Merchandise Blocks, using one (1) email Merchandise Block Design and the application of one (1) associated Recipe per email Merchandise Block as follows: Broadcast (Top Sellers); Broadcast (What’s New); Broadcast (Recent Activity); Welcome (Gateway Products); Page Browse (Top Sellers); Product Browse (Similar Products); Shopping Cart Abandonment (Frequently Bought Together); Price Drop (Frequently Bought Together); Low Inventory (Frequency Bought Together); Back In Stock (Frequently Bought Together); Post Purchase (Top Sellers); Post Purchase (What’s New); Post Purchase (Purchase This That); Post Purchase (Trending); Replenishment (Frequently Bought Together); Birthday (Top Sellers); Churn Prevention (Top Sellers); Loyalty (Recent Activity); Re-Engagement (Trending); Transactional (Purchase This That).
    - Client Responsibilities: All Email Message updates, including the removal of old email Merchandise Blocks and the insertion of new email Merchandise Blocks. Product Recommendations maintenance, including the identification and removal of Merchandise Blocks and Recipes no longer used or needed by Client.
  - Platinum:
    - Email Merchandise Block Design: Listrak consultation with Client and custom design of three (3) different email Merchandise Block Designs using standard merchandise block functionality.

- Recipes: Listrak consultation with Client and custom creation of up to twenty (20) product recommendation algorithms (“Recipes”).
- Email Merchandise Block Build: Listrak build of twenty (20) email Merchandise Blocks, using any of the newly created custom email Merchandise Block designs and applying one (1) to four (4) of the newly created Recipes per email Merchandise Block.
- Client Responsibilities: All Email Message updates, including the removal of old email Merchandise Blocks and the insertion of new email Merchandise Blocks. Product Recommendations maintenance, including the identification and removal of Merchandise Blocks and Recipes no longer used or needed by Client.

PREDICTIVE ANALYTICS

- **Definition:** Part of Listrak Intelligence Suite, Predictive Analytics is a Data-Dependent Solution that uses historical data, statistical algorithms and machine learning to help identify the likelihood of future outcomes and make those insights actionable to Client via segmentation criteria that can be used to filter and Message Contacts.
- **Predictive Analytics Segmentation Criteria:** Predicted Lifecycle Stage (active, at risk, churned); Likelihood to Open an Email (within the next 14 days); Likelihood to Click an Email (within the next 14 days); Likelihood to Unsubscribe from an Email (within the next 14 days); Likelihood to Purchase (within the next 14 days); Brand Affinity; Category Affinity; Subcategory Affinity; Coupon Affinity (likely to purchase with a coupon); Discount Affinity (likely to purchase using a discount); Predicted Future Spend (Percentile over the next 12 months); Predicted Future Spend (Value over the next 12 months); Project Order Date.
  - NOTE: Coupon Affinity and Discount Affinity only work if Client passes coupon and discount information in order files.
- **Eligibility:** Including in Onboarding any Intelligence Suite or through an applicable Add-On SOF.
- **Implementation as part of Onboarding:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Segment Creation: Listrak to create six (6) Predictive Analytics Segments: At Risk; Churned; Customers with Highest Future Spend; Most Likely to Open; Most Likely to Purchase; Most Likely to Unsubscribe.

  Custom Journeys & Messages: Predictive Analytics creates the opportunity for Client to include “Churn Prevention” Custom Journeys (i.e., Journeys where Subscribers are triggered by changes in their Customer lifecycle stage). Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Silver: Message design and build, and Journey build by Client. Listrak recommends Client build two (2) “Churn Prevention” Custom Journeys, using separate Segment Entry Events for Contacts “At Risk” and “Churned,” with at least one (1) Message per contracted Channel within each Journey.
  - Gold: Listrak templated build of two (2) “Churn Prevention” Custom Journeys, using separate Segment Entry Events for Contacts “At Risk” and “Churned,” with one (1) templated Message per contracted Channel, per Journey.
  - Platinum: Listrak custom build of two (2) “Churn Prevention” Custom Journeys, using separate Segment Entry Events for Contacts “At Risk” and “Churned,” with one (1) custom Message per contracted Channel, per Journey.
- **Implementation as an Add-On:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

Segment Creation: Listrak to create six (6) Predictive Analytics Segments: At Risk; Churned; Customers with Highest Future Spend; Most Likely to Open; Most Likely to Purchase; Most Likely to Unsubscribe.

PREDICTIVE CONTENT

- **Definition:** Part of Listrak Intelligence Suite, Predictive Content is a Data-Dependent Solution that allows Client to use Listrak functionality to dynamically insert personalized content from Client's website into email Messages based on the Contact's general-, page- and product-browse activity.
- **Eligibility:** Included in Onboarding Listrak Intelligence Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, including: a strategy review of Client's site for content inclusion; initial setup of URL definition rules within the Predictive Content Manager; and validation of content data populated in the Predictive Content manager.

  Considerations: Content items will only be recommended if the Listrak content crawler can find a good Title, Image, and Description. URLs used within the Content Manager's URL rules settings page are recommended to be easily distinguishable as content by hosting the content within a content category page so that the URL contains a path that specifically identifies the resource in the host Domain. (e.g., www.example.com/blog/article1). Design elements and attributes included in a content block design (e.g., product image, title) are limited to those passed to Listrak via the personalization Integration. In rare cases, if the content crawler is blocked, Client can whitelist the Listrak crawler on their side using: User-Agent contains "listrak." The Predictive Content Solution is available for email only. If specific content is required, Listrak will provide information guidance on how to integrate meta tags directly on Client's website.

WEBSITE PRODUCT RECOMMENDATIONS

- **Definition:** Part of Listrak Intelligence Suite, Website Product Recommendations is a Data-Dependent Solution that provides Client with functionality to customize the criteria, appearance, and insertion of highly personalized and relevant product recommendations into Client's website.
- **Eligibility:** Including in Onboarding any Intelligence Suite or through an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and delivery of Listrak documentation to instruct Client on how to insert and design Website product Recommendations on Client's website.

  Intelligence Suite Plus:

  - Website Merchandise Block Build & Recipes: Listrak creation of four (4) merchandise blocks to include between two (2) and twelve (12) products each, and four (4) website product recommendation algorithms ("Recipes").
  - Website Merchandise Block Placement & Design: Client responsible for inserting and designing website merchandise blocks used in Client's website. Listrak recommends incorporation into pages such as: Homepage, Category Page, Website Product Detail Page, No Search Results Page, Shopping Cart. Client is responsible for final website rendering and accepts certain third-party systems may impact or impede rendering (e.g., ad blockers).

  Intelligence Suite Standard: (applicable only during Onboarding Shopify Growth Suite)

  - Website Merchandise Block Build & Recipes: Listrak creation of two (2) website merchandise blocks to include between two (2) and twelve (12) products each, and two (2) Website Product Recommendation algorithms ("Recipes").

- Website Merchandise Block Placement & Design: Client responsible for inserting and designing Website Merchandise Blocks used in Client's website. Listrak recommends incorporation into pages such as: Homepage, Category Page, Website Product Detail Page, No Search Results Page, Shopping Cart. Client is responsible for final website rendering and accepts certain third-party systems may impact or impede rendering (e.g., ad blockers).
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JOURNEY HUB

- **Definition:** Journey Hub is a standard part of Listrak platform functionality, which enables Client to quickly and easily, create and orchestrate Journeys within and across Channels using a combination of Journey Hub triggered events that are universally available or subject to Client's contracted Solutions.
- **Eligibility:** Apart from any Journey included in Onboarding or Transactional Messages, Client can contract Listrak to build a Custom Journey or Standard Journey through an Add-On SOF.

CUSTOM JOURNEY

Implementation as an Add-On:

- Listrak to consult with Client to gather business requirements, make recommendations for Journey logic, and build a Custom Journey using existing Journey Hub functionality.
  - For a Custom Journey triggered by a Segment Entry Event, Listrak to work with Client to create the required Segment.
  - For a Custom Journey triggered by a Custom Event, Listrak to provide technical guidance to enable Client to configure the Custom Event (file import, Listrak JavaScript Integration or Listrak API Integration).
- The correct operation of the Custom Journey logic is subject to the accuracy of Client's Listrak data, including, if applicable, any Integrations related to triggering a Custom Event.
- The configuration of any Third-Party Integration or other Integration related to triggering a Custom Event, or the creation or update of any related Journey Messages is out of Scope, unless specifically included in an applicable SOF.
- Any Client-requested Journey logic beyond existing Journey Hub capabilities is out of Scope.

STANDARD JOURNEY

Implementation as an Add-On:

- Listrak to consult with Client to gather business requirements, make recommendations for Journey logic, and build a Standard Journey using existing Journey Hub functionality.
- Listrak creation of a Standard Journey and the correct operation of the Standard Journey is subject to the applicable Solution included in Client's contracted Domain, and the accuracy of Client's Listrak data.
- The creation or update of any related Journey Messages is out of Scope, unless specifically included in an applicable SOF.
- Any Client-requested Journey logic beyond existing Journey Hub capabilities is out of Scope.

LANDING PAGE

- **Definition:** Landing Pages are a standard part of Listrak platform functionality, which enables Client to quickly and easily, design and deploy stand-alone, Listrak-hosted webpages using an intuitive drag-and-drop editor, with little to no HTML or CSS coding required. A single Landing Page can be used to accomplish the business goal, or multiple Landing Pages can work together to create a Landing Page Experience.

- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation as part of Onboarding:**

  Subscribe Landing Pages: Listrak templated build of up to two (2) Listrak-hosted, stand-alone, Acquisition Landing Page Experiences: Email Subscribe; and SMS Subscribe, using existing Landing Page functionality and consisting of two (2) pages: One (1) page to capture Email or Phone Number for SMS; and one (1) Form Submission Confirmation Page with a link back to Client's website.

  Email Unsubscribe Landing Page: Listrak templated build of one (1) Listrak-hosted, stand-alone Email Unsubscribe Confirmation Landing Page, using existing Landing Page functionality to provide a Client-branded experience confirming an Email Unsubscribe request and providing a link back to Client's website for email Subscribers who clicked a universal Unsubscribe link on Email Messages not associated with Client's Preference Center.

  - Any custom design or integration of these Landing Pages into Client's website is out of Scope.
- **Implementation as an Add-On:**

  Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Gold: Listrak templated design and build of one (1) Landing Page Experience, using existing Landing Page functionality to meet Client's subscription/data acquisition or informational needs. Landing Page will consist of up to three (3) pages: Up to two (2) pages to capture data (Email, and/or Phone Number and/or up to five (5) additional fields); and one (1) Information or Form Submission Confirmation Page with one (1) link back to Client's website. Landing Pages can be stand-alone, or Client can follow Listrak instructions to embed the Landing Page into Client's website.
  - Platinum: Listrak custom design and build one (1) Landing Page Experience, using existing Landing Page functionality to meet Client's subscription or data acquisition needs. Landing Page will consist of up to three (3) pages: Up to two (2) pages to capture data (Email, and/or Phone Number and/or up to five (5) additional fields); and one (1) Information or Form Submission Confirmation Page with up to three (3) different links of Client's choosing. Landing Pages can be stand-alone, or Client can follow Listrak instructions to embed the Landing Page into Client's website.

POPUP PRO (ON-SITE ACQUISITION)

- **Definition:** Replaced by Experience Builder in July 2025, Popup Pro (also known as "On-Site Acquisition") is a classic Solution still available to Clients contracted for the Solution and enables Client to design and deploy popup Experiences using a library of pre-built templates and custom HTML/CSS.
- **Eligibility:** Through an applicable Add-On SOF to create an additional Popup, provided Popup Pro was enabled and in use by Client prior to July 2025.
- **Implementation:**

  Additional Popup: Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Gold: Listrak templated build of one (1) single- or multi-Channel Popup, subject to existing Popup Pro functionality.
  - Platinum: Listrak custom build of one (1) single- or multi-Channel Popup, using Listrak custom design or Listrak use of Client-provided design, subject to existing Popup Pro functionality.

  Exclusions: Creation of new Messages, Conversations or Journeys related to the new Popups, or modification of existing Messages, Conversations or Journeys related to the new Popup is out of Scope.

POST PURCHASE

- **Definition:** Post Purchase is a Data-Dependent Solution that leverages Client's Customer purchase behavior and order data to trigger Customers into Standard Listrak Journeys to receive Triggered Messages. Post Purchase enables Client to easily and systematically re-engage Customers to help increase purchase frequency and Customer lifetime value.
- **Post Purchase Entry Events:** Post Purchase offers several Standard Journey entry events:

  POST PURCHASE

  - A generic "Post Purchase" Standard Journey event that triggers Customers into a Standard Journey after making a purchase, allowing Customers to receive Triggered Messages after a configurable period.
  - Some popular Post Purchase Journeys include:
    - "Thank You" often sent 1-7 days after purchase.
    - "Cross-Sell" or "Up-Sell" often sent 14-30 days after a purchase.
    - "Flagship Product" often sent 7-14 days to Customers who never purchased Client's flagship product(s)

  REVIEW REQUEST

  - A specialized "Post Purchase" Standard Journey event that triggers Customers into a Standard Journey based on Client's order data indicating the shipment or delivery an order or order item, allowing Customers to receive Triggered Messages after a configurable period.
  - Timing of Review Request Messages varies by Client's Listrak Integration and business needs. In most cases, sending a Review Request Message 30 days after delivery of the entire order usually provides enough time for the Customer to use the product(s) to provide a relevant review. If Client's Listrak Integration with Client's website is not a Shopify integration, Client may have additional timing options for Message delivery based on Client's order data in the Listrak platform indicating an individual product status as "shipped" or "complete."
  - Client's Listrak Integration with Shopify
  - The extent and method used to populate "Write a Review" products and links in Review Request Messages will vary based on Client's Listrak Integration and/or use of Third-Party Integrations (e.g., generic link to the product page or specialized link to write a review).

  WIN BACK

  - A specialized "Post Purchase" Standard Journey event that triggers Customers into a Standard Journey based on Client's order data indicating the Customer's last purchase date matching a configurable period between 30 days and 365 days since last purchase.
  - Timing of Win Back Messages varies by Client, with 90 days being a popular starting point. Some Clients send sooner (e.g., 30 or 60 days) or additional touch points (120, 180, 270 days, etc.…).
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Journeys & Messages: Given the generic and flexible nature of Post Purchase Standard Journeys, any number of Post Purchase Standard Journeys can be added to Client's Listrak Program. Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

- Silver: Message design and build, and Journey build by Client. Listrak recommends Client launch at least four (4) “Post Purchase” Standard Journeys with at least (1) Triggered Message per contracted Channel within each Journey.
- Gold: Listrak templated build of up to four (4) “Post Purchase” Standard Journeys, and templated design of one (1) Triggered Message per contracted Channel within each Journey. Listrak will consult with Client to determine the most appropriate Standard Journeys, with the Journeys below as a general best-practice.
  - Post Purchase “Thank You” (3 days after any purchase)
  - Post Purchase “Cross-Sell / Up-Sell” (14 days after any purchase)
  - Review Request (30 days after product or order delivery)
  - Win Back (90 days after the last purchase)
- Platinum: Listrak custom build of four (4) “Post Purchase” Standard Journeys based on Listrak and Client determination of the most appropriate Journeys. Listrak custom design or Listrak use of Client-provided designs of one (1) Message per contracted Channel within each Journey.

Other Considerations & Client Responsibilities:

- The quantity and deployment of Post Purchase Messages is dependent on Client’s Listrak Integration properly providing and updating relevant Customer, product, and order data.
- The deployment of any Post Purchase Standard Journey based on any trigger other than order date is subject to Client properly updating order item, order statuses and other relevant order data in Listrak.
- Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client’s Listrak data.

PREFERENCE CENTER

- **Definition:** A Preference Center is a Listrak designed, maintained, and hosted series of Client-branded webpages to enable Client’s Contacts to enter and manage profile data, subscription, and communication preferences specific to Client’s Master List under one Domain.
- **Eligibility**: Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Design: Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Silver or Gold: Listrak templated build of a Preference Center with four (4) pages: Form/Manage Preferences; Form Submission Confirmation; Unsubscribe Confirmation/Resubscribe; Error. Preference Center Form with six (6) standard fields: Email; Mobile Number (if applicable); First Name; State; Zip Code; Birthday (MM/DD format), and up to five (5) additional fields.
  - Platinum: Listrak custom build of a Preference Center using Listrak custom design or Listrak use of Client-provided design, including four (4) pages: Form/Manage Preferences; Form Submission Confirmation; Unsubscribe Confirmation/Resubscribe; Error. Preference Center Form with six (6) standard fields: Email; Mobile Number (if applicable); First Name; State; Zip Code; Birthday (MM/DD format), and up to five (5) additional fields.

  Operation & Installation:

  - The link to “Manage Preferences” is intended to be used on email Messages sent from Client’s Master List. Listrak will provide Client with the proper link to include in the footer used on Client’s Master List, as well as update any Saved Content footer or email template associated with Client’s Master List.

- Client can choose to operate Preference Center as a stand-alone Listrak webpage, or Client can load the Preference Center at Client's website via a div tag placed on a web page that is not located in an area that requires the user to log-in. (e.g. Preference Center needs to be accessible via a single link click from an Listrak email).

Exclusions: The Preference Center functions and processes listed below are out of Scope:

- Listrak Preference Centers that span multiple Domains or multiple lists in Client's Listrak Account.
- Listrak Preference Centers that manage subscription settings by type of Listrak Message or Journey.
- Listrak Preference Centers that also integrate with a Third-Party.
- Offering Subscribers an "opt-down" or Message frequency choice.
- Using the Listrak platform to capture, transmit, or store the reason(s) for unsubscribing.

REACTIVATE

- **Definition:** Reactivate is a Listrak service that examines inactive email Subscribers on Client's Master List and provides Client with a segmentation strategy for Client to efficiency reengage the inactive Subscribers.
- **Eligibility:** Included in an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak will consult with Client to determine the criteria to define "inactive" Master List email Subscribers (i.e., last send date greater than 365 days ago, etc.…). Listrak will conduct a one-time analysis of the inactive Subscribers and identify the Subscribers Client should unsubscribe from the Master List and the Subscribers Client should attempt to reactivate. Listrak will consult with a Listrak Deliverability Analyst, or equivalent subject matter expert to make the appropriate Subscriber updates on Client's Master List, including adding a profile field to "flag" reactivate eligible Subscribers and providing Client with a recommended Broadcast email send cadence for the reactivate eligible Subscribers.

  Execution: Client is responsible for following Listrak's recommended Broadcast email send cadence and incorporating reactivate eligible Subscribers into Client's Broadcast email marketing messages.

  Reporting: Approximately 30 days after Client begins incorporating reactivate eligible Subscribers into Client's Broadcast email marketing messages, or after Client has sent at least one Broadcast email Message to reactivate eligible Subscribers, Listrak will conduct a one-time activity analysis of the reactivate eligible Subscribers and provide Client with the results of the Reactivate effort.

REPLENISHMENT

- **Definition:** Replenishment is a Data-Dependent Solution that triggers Customers into a Standard Journey to receive Triggered Messages when the time elapsed between the Customer's previous purchase of an eligible product aligns with the reorder cadence set by Client in the Listrak platform or automatically calculated by the Listrak platform.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Journey & Messages: One (1) "Replenishment" Standard Journey can be included in Client's Listrak Program. Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Silver: Message design and build, and Journey build by Client. Listrak recommends Client send at least one (1) Triggered Message per contracted Channel.

- Gold: Listrak templated build of one (1) “Replenishment” Standard Journey, and Listrak templated design of one (1) Triggered Message per contracted Channel.
- Platinum: Listrak custom build of one (1) “Replenishment” Standard Journey. Listrak custom design or Listrak use of Client-provided design of one (1) Triggered Message per contracted Channel.

Other Considerations & Client Responsibilities:

- By default, any new product added into Client’s Listrak product database is not eligible for Replenishment, therefore the quantity and deployment of Replenishment Messages is dependent on: Client’s Listrak Integration properly providing and updating relevant Customer, product and order data; and Client using the Replenishment Dashboard in the Listrak platform to update, manage and maintain the products eligible to be included in the Replenishment Standard Journey.
- At Client’s request, Listrak will include an optional “Remind Me Later” Replenishment Message, which is a resend of the first Replenishment Triggered Message using one (1) “Remind Me Later” button in the first Message design that will use a Listrak DataStamp Offset System Field to present the deadline to click the button (typically 14 days after the Message was sent) and the associated period of time that will elapse between the Customer’s click and the send of the requested “Reminder” Message (typically 7 days after an eligible click). Upon clicking the button, the Customer will be directed to a Listrak templated Landing Page confirming the Remind Me Later request was clicked. For clicks that occur before the deadline, Customers will proceed within the Journey to receive the associated Reminder Message.
- Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client’s Listrak data.

SHOPPING CART ABANDONMENT

- **Definition:** Shopping Cart Abandonment is a Data-Dependent Solution that triggers Subscribers into a Standard Journey to receive Triggered Messages based on the Subscriber leaving Client’s website after adding products to a shopping cart, but before completing a purchase.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  Technical: Listrak Solution enablement and relevant Listrak Integration support, testing and validation.

  Journey & Messages: A “Shopping Cart Abandonment” Standard Journey can be included in Client’s Listrak Program. Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - Silver: Message design and build, and Journey build by Client. Listrak recommends Client send at least one (1) Triggered Message per contracted Channel.
  - Gold: Listrak templated build of one (1) “Shopping Cart Abandonment” Standard Journey. Listrak templated design of three (3) email Triggered Messages, two (2) SMS Triggered Messages, and one (1) Triggered Message for any other contracted Channel.
  - Platinum: Listrak custom build of one (1) “Shopping Cart Abandonment” Standard Journey. Listrak custom design or Listrak use of Client-provided designs of three (3) email Triggered Messages, two (2) SMS Triggered Messages, and one (1) Triggered Message for any other contracted Channel.

  Client Responsibilities:

  - The quantity and deployment of Shopping Cart Abandonment Messages is dependent on Client’s Listrak Integration properly identifying and subscribing eligible website visitors and regularly updating relevant product and order data.

- Client understands cross-device cart recreate functionality varies by website platform. If Client desires this functionality but Client's website cart recrate functionality is incompatible with Listrak Journey Hub functionality, Client will need to build a custom method to provide the required cart recreate link via Client's Listrak Integration.

Other Considerations:

- Quantity and content of SMS Cart Abandonment Messages will be subject to compliance standards.
- Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client's Listrak data.

TRANSACTIONAL EMAIL MESSAGES

- **Definition:** Transactional Email Messages use core Listrak platform functionality to send a Message to a Contact when the Listrak platform receives a signal (e.g., API call) from Client's website or other system to trigger the applicable Message, including the required message details. Due to the subject matter of Transactional Email Messages, sending usually not restricted by a Contact's subscription status.
  - **Shopify Transactional Email Messages:** If Client's Shopify website is using Listrak's Shopify Integration, selected Transactional Email Messages can be sent through Listrak via Journey Hub.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

As part of Onboarding:

Technical: Listrak to execute required platform configuration, creation of up to thirty-five (35) profile fields for Transactional Message use and provide Client with instructions to create Client's API User credentials. Listrak to deliver the applicable Transactional Email Message Integration guide and testing instructions to Client.

Messages: Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

- Silver: Message design, build and final testing by Client.
- Gold: Listrak templated design and render testing of up to eight (8) Transactional Emails. Client responsible for creation of any additional messages, and final end-user testing of all messages (including any/all message variations and dynamic content elements).
- Platinum: Listrak custom design and render testing of up to eight (8) Transactional Emails. Client responsible for creation of any additional messages, and final end-user testing of all messages (including any/all message variations and dynamic content elements).

Implementation as an Add-On:

Technical: Listrak to execute required platform configuration, including the creation of API user credentials and the creation of up to thirty-five (35) profile fields for Transactional Message use. Listrak to deliver the applicable Transactional Email Message Integration guide and testing instructions to Client.

Messages: Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

- Silver: Message design, build and final testing by Client.
- Gold: Listrak templated design and render testing of one (1) Transactional Email. Client responsible for final end-user testing (including any/all message variations and dynamic content elements).
- Platinum: Listrak custom design and render testing of one (1) Transactional Email. Client responsible for final end-user testing (including any/all message variations and dynamic content elements).

Other Considerations & Client Responsibilities:

- o Client understands Transactional Email Message setup (including available functionality, layout, customizations, and data) will vary based on Client's website platform.
- o Email subscription status is often not considered when sending Transactional Email Messages. If Client uses Listrak Transactional Message functionality to send Email Messages, Client is responsible for ensuring Email Transactional Messages triggered by Client are compliant with all applicable laws.
- o If Client wishes to "resend" a Transactional Message, Client must use the applicable "resend" API call. The Listrak platform does not offer "resend" functionality in the user-interface.
- o Transactional Email Messages containing dynamic content, segmented by products purchased, spend thresholds, split tests, or other factors may be limited within the Listrak platform and will require coding by Client to make and test the appropriate API calls.
- o Transactional Email Messages are sent to a single recipient. Multiple recipients per send is not possible or in Scope.
- o If Client wishes to Blind Carbon-Copy or "BBC" Transactional Email Messages, BCC functionality will be subject to the existing capabilities of the Listrak platform, and the capabilities of Client's email system receiving the BCC messages. Any BCC message sends will count toward Client's contracted email allotment. Carbon Copy or "CC" functionality is out of Scope.
- o Shopify Transactional Email Messages sent via Listrak will be configured using Listrak Journey Hub. Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client's Listrak data.

WELCOME SERIES (LIST SUBSCRIPTION)

- **Definition:** A List Subscription Standard Journey is a core Listrak platform function that triggers Subscribers into a Standard Journey to receive a series of Triggered Messages (e.g., "Welcome Series") based on the Contact subscribing or resubscribing to a list.
- **Eligibility:** Included in Onboarding a Listrak Suite or an applicable Add-On SOF.
- **Implementation:**

  <u>Technical:</u>

  - o Outside of List creation in Client's Listrak Account, no formal Solution enablement is required.
  - o If the respective list is a Master List associated with a contracted Domain in Client's Listrak Account, Listrak will provide relevant Listrak Integration support, testing, validation.

  <u>Journey & Messages</u>: A List Subscription Standard Journey can be included in Client's Listrak Program. Listrak Design Support will align with contracted Implementation Service Level and the Scope below:

  - o <u>Silver:</u> Message design and build, and Journey build by Client. Listrak recommends the following Messages by Channel and Subscriber type:
    - ▪ Three (3) email Triggered Messages to New Subscribers and Resubscribers
    - ▪ One (1) email Triggered Message to Existing Subscribers
    - ▪ Three (3) SMS Triggered Messages to New Subscribers: two (2) "Welcome" Messages and one (1) "Contact Card" Message
    - ▪ Two (2) SMS Triggered Messages to Resubscribers: one (1) "Welcome" Message and one (1) "Contact Card" Message
    - ▪ One (1) Triggered Message to Subscribers in any other contracted Channel.

- Gold: Listrak templated build of one (1) “List Subscription” Standard Journey. Listrak templated design of the following Messages by Channel and Subscriber type:
  - Three (3) email Triggered Messages to New Subscribers and Resubscribers
  - One (1) email Triggered Message to Existing Subscribers
  - Three (3) SMS Triggered Messages to New Subscribers: two (2) “Welcome” Messages and one (1) “Contact Card” Message
  - Two (2) SMS Triggered Messages to Resubscribers: one (1) “Welcome” Message and one (1) “Contact Card” Message
  - One (1) Triggered Message to Subscribers in any other contracted Channel.
- Platinum: Listrak custom build of one (1) “List Subscription” Standard Journey. Listrak custom design or Listrak use of Client-provided designs of the following Messages by Channel and Subscriber type:
  - Three (3) email Triggered Messages to New Subscribers and Resubscribers
  - One (1) email Triggered Message to Existing Subscribers
  - Three (3) SMS Triggered Messages to New Subscribers: two (2) “Welcome” Messages and one (1) “Contact Card” Message
  - Two (2) SMS Triggered Messages to Resubscribers: one (1) “Welcome” Message and one (1) “Contact Card” Message
  - One (1) Triggered Message to Subscribers in any other contracted Channel.

Other Considerations & Client Responsibilities:

- Triggered Messages in List Subscription Standard Journeys are unique from other Journeys in that the Subscriber’s Message send sequence is isolated to the specific Channel in which the subscription occurred, operating independently from any subscription activity that may occur in other Channels. (i.e., Email Messages are sent independently from SMS Messages, and vice versa, etc.)
- If Client chooses to use coupon codes in Welcome Messages, a new coupon code will be assigned to a Contact for each new Channel subscription event and will be cleared from the Subscriber’s profile upon exiting the List Subscription Standard Journey for that Channel.
- Any Client-requested Journey logic beyond Listrak Standard Journey configuration Scope will be subject to Implementation Service Level, existing Journey Hub capabilities and Client’s Listrak data.

STRATEGY SERVICES

OVERVIEW

Listrak "Strategy Services" is defined as: Client contracting Listrak through a Sales Order Form ("SOF") for Listrak to provide Client with educational tools and ongoing professional assistance to:

1) Encourage Client to maximize adoption and use of the Listrak platform.
2) Assist Client in analyzing and understanding Listrak Program performance.
3) Provide Client with guidance and strategic recommendations to help Client achieve Client's business goals and maximize the ROI of Client's Listrak Program.

The extent of Strategy Services for a single contracted Domain within Client's Listrak Program will be identified through a "Strategy Package" and a coordinating service level identifier (e.g., Bronze, Silver, Gold, Platinum).

This document details extent of Listrak responsibilities and deliverables for each Strategy Package ("Strategy Scope").

Client understands any work, task, requirement, or deliverable Client wishes Listrak to perform outside or beyond the Strategy Scope associated with Client's contracted Strategy Services or Strategy Package will require the change or addition, including any associated fees, be memorialized through an amendment to Client's original SOF, or through a new SOF.

PROGRAM OPTIMIZATION

A "Program Optimization" is defined as: a formal request submitted by Client and/or by Listrak on behalf of Client, for Listrak internal teams to leverage standard Listrak functionality and Client's existing Listrak configuration/integrations to complete a single modification to an existing component in Client Listrak Program.

- **Program Optimization Allotment & Usage:**
  - An annual allotment of Program Optimizations may be included in a Client's SOF and/or as part of Client's contracted Strategy Package.
  - Client may submit up to two (2) Program Optimizations per calendar month.
  - Listrak will track and provide Client with visibility into the usage of their annual allotment of Program Optimizations.
  - Client may not use or apply Program Optimizations to Listrak services that require a dedicated or separate SOF..
  - Any unused Program Optimizations remaining at the end of Client's annual contract term will expire and may not be rolled over into the next annual contract term.
  - Client may add Program Optimizations to their Listrak Agreement and/or increase their contracted annual allotment through a separate Listrak SOF, subject to the current Listrak price at that time.
- **Types of Program Optimization Requests:** A Program Optimization can be proposed by the Client and/or Listrak, and will generally fall into one of four main types of requests:
  - Create or modify a Listrak Experience (e.g. popup experience, landing page).
  - Create or modify a Journey, including Journey entry, logic, and/or message(s) within the Journey.
  - Create or update a single program component (e.g. email template, saved content, product recommendations merchandise block).

    - Create and run a test, including defining test logic and success criteria, and if applicable, apply the winning strategy at the conclusion of the test to the applicable Experience, Journey or Campaign.

- **Acceptance & Delivery:**
    - Client requests for a Program Optimization must include all applicable assets, business requirements, and instructions related to the Program Optimization for the request to be formally accepted.
    - Once formally accepted, Listrak will strive to complete the request within 10-15 business days. Client recognizes the timeframe for actual completion and delivery of any Program Optimization will be unique and is subject to delay based on factors including but not limited to: the complexity of the request; potential changes made after the original request was accepted; delays in Client approvals; holidays or office closures; and Listrak's current project queue at the time of the request.
- **Rejections & Exclusions:** Listrak reserves the right to reject a proposed Program Optimization if the request requires a separate Listrak agreement or Listrak sales order form, or requires a custom Listrak statement of work, or matches any of the following criteria:
        - Adding a new domain, channel or Listrak solution to the Client's Listrak program.
        - Adding a new Listrak integration and/or third-party integration to the Client's Listrak program.
        - Updating the Client's Listrak program to align with the Client's website replatform.
        - Creating functionality that does not exist in the Listrak application.
        - Upgrading the Client's Listrak program to a newer version of the Listrak application.
    - If a request for Program Optimization is rejected, Listrak will notify the Client as to the reason and, if applicable, potential next steps (e.g. request requires a separate SOF).

BRONZE STRATEGY PACKAGE

- **Annual Program Optimizations:** Not included.
- **Email Account Support:** Client can submit Listrak Account and platform questions via email and receive a response via email from a member of the Listrak Client Success Team.
- **Optional Quarterly Check-In:** At Client's request, a member of the Listrak Client Success Team will meet with Client up to one (1) time every three (3) months for a "Check-In" Call. The duration of each Check-In Call will be up to one (1) hour and will be conducted via video conferencing software. During the Check-In Call, Listrak will provide Client with general program performance insights, propose optimization opportunities, and review new Listrak functionality.

SHOPIFY STRATEGY PACKAGE

- **Annual Program Optimizations:** Client will receive (four) 4 Program Optimizations.
- **Dedicated Account Manager:** An Account Manager within the Listrak Client Success Team will be assigned to serve as Client's primary point of contact to help Client understand, optimize, and grow Client's Listrak Program for the contracted Domain.
- **Monthly Program Insights & Assistance:** Client's dedicated Account Manager will meet with Client up to one (1) hour, one (1) time per month via video conferencing software to discuss program performance, share industry trends, propose Program Optimization and growth opportunities, and review new Listrak functionality.

SILVER STRATEGY PACKAGE

- **Annual Program Optimizations:** Client will receive (six) 6 Program Optimizations.
- **Dedicated Account Manager:** An Account Manager within the Listrak Client Success Team will be assigned to serve as Client's primary point of contact to help Client understand, optimize, and grow Client's Listrak Program for the contracted Domain.
- **Monthly Program Insights & Assistance:** Client's dedicated Account Manager will meet with Client up to one (1) hour, one (1) time per month via video conferencing software to discuss program performance, share industry trends, propose Program Optimization and growth opportunities, and review new Listrak functionality.

GOLD STRATEGY PACKAGE

- **Annual Program Optimizations:** Client will receive (twelve) 12 Program Optimizations.
- **Dedicated Account Manager:** An Account Manager within the Listrak Client Success Team will be assigned to serve as Client's primary point of contact to help Client understand, optimize and grow Client's Listrak Program for the contracted Domain.
- **Bi-Weekly Program Insights & Assistance:** Client's dedicated Account Manager will meet with Client up to one (1) hour, two (2) times per month via video conferencing software to discuss program performance, share industry trends, propose Program Optimization and growth opportunities, and review new functionality.
- **Dedicated Digital Marketing Strategist:** A Digital Marketing Strategist within the Listrak Client Success team will be assigned to provide additional assistance, insights and analysis to Client and Client's Listrak Account Manager for the contracted Domain. The Digital Marketing Strategist will join one (1) Program Insights meeting per month to assist in reviewing Client's performance report, align on goals and make recommendations for optimizations to Client's Listrak Program.
- **Bi-Annual Roadmap Sessions:** Listrak will meet with Client one (1) time, every six (6) months for up to two (2) hours to conduct deeper, more strategic discussions to understand Client's Listrak Program performance and plan for Program Optimizations to help align and achieve Client's business goals.
- **Annual Industry & Holiday Analysis:** Between July 1st and Sept 30th, Listrak Account Manager and Digital Marketing Strategist will audit Listrak Program performance for the contracted domain from October-December the prior year, and present client with the audit findings, industry trends, competitive analysis and actionable insights to help Client prepare for the upcoming quarter/holiday season.

PLATINUM STRATEGY PACKAGE

- **Annual Program Optimizations:** Client will receive (eighteen) 18 Program Optimizations.
- **Dedicated Account Manager:** An Account Manager within the Listrak Client Success Team will be assigned to serve as Client's primary point of contact to help Client understand, optimize and grow Client's Listrak Program for the contracted Domain.
- **Weekly Program Insights & Assistance:** Client's dedicated Account Manager will meet with Client up to one (1) hour, one (1) time per week via video conferencing software to discuss program performance, share industry trends, propose Program Optimization and growth opportunities, and review new functionality.
- **Dedicated Digital Marketing Strategist:** A Digital Marketing Strategist within the Listrak Client Success team will be assigned to provide additional assistance, insights and analysis to Client and Client's Listrak Account Manager for the contracted Domain. The Digital Marketing Strategist will join two (2) Program

Insights meetings per month to assist in reviewing Client's performance report, align on goals and make recommendations for optimizations to Client's Listrak Program.

- **Quarterly Roadmap Sessions:** Listrak will meet with Client one (1) time, every three (3) months for up to two (2) hours to conduct deeper, more strategic discussions to understand Client's Listrak Program performance and plan for Program Optimizations to help align and achieve Client's business goals.
- **Bi-Annual Industry & Holiday Analysis:** Listrak Account Manager and Digital Marketing Strategist will audit Listrak Program performance for the contracted domain one (1) time every six (6) months and present client with the audit findings, industry trends, competitive analysis and actionable insights to help Client prepare for the upcoming quarter/holiday season.
- **Annual Onsite Strategy Session:** Listrak will consult with Client to schedule and plan one (1) in-person, strategy session to be held annually at Client's offices, Listrak offices or other mutually agreed upon location. The strategy session will include a review of Client's Listrak Program performance to ensure alignment with Client's key goals and initiatives.