

# Statement of Work (SOW) - Momentus Elite Premier Plus Onboarding One-Time Services

## Project Summary

Provider will work with Customer to complete the following as a part of this project:

- Momentus Elite Premier Plus Onboarding

## Assumptions

### Onboarding Approach

Provider will work with Customer to configure, onboard, and train on Elite for a single tenant using the Elite Learning and Launch Intelligent Experience (ELLIE), Momentus' AI onboarding agent. Customer acknowledges that onboarding is primarily self-guided through ELLIE, which provides guided tasks, learning prompts, and structured workflow progression.

Customer shall assign appropriate resources and maintain active participation throughout onboarding. Customer is responsible for timely completion of all assigned tasks within ELLIE, including executing configuration tasks, providing required inputs, and making business decisions as prompted. Delays in Customer responsiveness or task completion may impact the overall onboarding timeline and are not the responsibility of Provider.

Provider will not perform daily execution or system configuration on behalf of Customer except where explicitly stated. Provider will deliver guidance, validation, and scheduled support sessions. Message thread is not intended for configuration or detailed workflow design. Requests requiring hands-on configuration, system setup, troubleshooting, or detailed workflow design will be addressed exclusively during scheduled sessions.

Implementation will be limited to configuring the platform using standard, out-of-the-box functionality and Provider-recommended best practices. Custom development, integrations beyond standard capabilities, or deviations from recommended configurations are excluded unless explicitly defined in the scope of work. Process documentation will be managed by the Customer with specific software processes outlined throughout the onboarding

## Limitations

### Elite Onboarding

The Services will be configured with the features and capabilities of the current release of the Product.

### ELLIE

The information, suggestions, and content generated by this Artificial Intelligence ("AI") system, Ellie, are provided for general informational purposes only. While the AI strives to

produce accurate and helpful outputs, it may generate incomplete, outdated, or incorrect information.

## Scope of Services

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### Kick Off

**Provider Responsibility:**

- Internal handover and preparation.
- Up to one (1) 60-minute remote kick off meeting with preparation.
- Review questionnaire responses and validate onboarding direction.
- Introduce guided onboarding workflow through ELLIE.
- Confirm roles, expectations, and milestone structure.

**Customer Responsibility:**

- Complete onboarding questionnaire prior to kickoff.
- Ensure key project resources and stakeholders can attend kick off meeting.
- Ensure project scope is accurate and fully aligns to all business requirements.
- Raise any risks, blackout periods for software release, resourcing plan.
- Provide required organizational and workflow inputs; rate sheets, venue maps, etc.
- Confirm and document onboarding goals, priorities, and launch timeline.

### Design

**Provider Responsibility:**

- Deliver guided design activities through ELLIE.
- Provide best-practice recommendations.
- Facilitate up to one (1) 60-minute remote review session to support decision-making and validation.
- Offer message thread based support for clarification or data validation.
- Monitor onboarding progress through defined milestone checkpoints.

**Customer Responsibility:**

- Complete guided design activities.
- Make required configuration decisions.

### Build

**Provider Responsibility:**

- Configuration of [standard base templates](#) such as hold confirmations, proposals, addenda, estimates, event orders, post-event reports, invoices, receipts, & credit memos.
- Minor adjustments to the standard base templates such as adding logos, modifying fonts, font sizes, and color. All other changes are out of scope.
- Configuration of up to five (5) custom contract document templates.
- Add standard reports and dashboards to Customer Elite Account.

**Customer Responsibility:**

- Review completed document templates with project team and any internal stakeholders in a timely manner.
- Provide feedback to Provider for adjustments through ELLIE.

## Training

### **Provider Responsibility:**

- Deliver in-app guided learning through ELLIE.
- Provide strategic guidance during scheduled sessions to address risks, clarify decisions, and ensure adherence to best practices.
- Facilitate up to five (5) 60-minute remote working sessions for complex topics or blockers.
- Offer AI- and consultant-based chat support for clarification or escalation during onboarding.
- Monitor onboarding progress through defined milestone checkpoints.

### **Customer Responsibility:**

- Complete training activities.
- Follow guided workflows.

## Testing

### **Provider Responsibility:**

- Provide Customer [Momentus Elite Dress Rehearsal Best Practices](#) article to utilize for "dress rehearsals".
- Troubleshooting support.

### **Customer Responsibility:**

- Customer is responsible for preparing for and executing user testing.
- Complete two (2) "dress rehearsals" following Provider's Momentus Elite Dress Rehearsal Best Practices article prior to working sessions.
- Confirm operational readiness.
- Promptly raise any issues found (that are within the scope of work).

## Launch & Post Launch

### **Provider Responsibility:**

- One (1) 60-minute remote go-live readiness session.
- Provide go-live readiness guidance through ELLIE.
- Internal handover.
- Project Closure.

### **Customer Responsibility:**

- Ensure key resources attend launch support session.
- Complete a full account review and audit (users and roles, calendar and list views, report and dashboard sharing).
- Promptly raise any issues found (that are within the scope of work).
- Complete customer satisfaction survey.

## Project Management

### **Provider Responsibility:**

- Maintain a structured onboarding plan through ELLIE, including task sequencing, milestone tracking, and progress visibility.

- Deliver automated reminders, guided next steps, and workflow prompts through ELLIE to support consistent progress.
- Monitor onboarding progress through defined milestone checkpoints.

**Customer Responsibility:**

- Nominated project lead.
- Coordination of activity and resources on customer side to align to project plan and schedule.
- Engage actively with ELLIE-guided onboarding tasks.
- Provide timely inputs, decisions, and feedback.
- Raise risks or blockers through scheduled sessions or chat support.

## Exclusions

- Additional custom document templates
- Custom development, including custom reports and dashboards
- Integration services
- Data migration
- Data import

## Project Schedule

The project timeline shall be determined based on the Services included in the agreed Order Form and Statement of Work. Following execution of the Order Form, Provider and Customer shall develop a written project plan, which shall be approved in writing by both parties (electronic acknowledgement acceptable). The project plan is a timing estimate only, which requires cooperation of both parties. The project plan may be modified from time to time upon the mutual written agreement of the parties (electronic acknowledgement acceptable).