

# Onboarding Services SOW

This Onboarding Services Statement of Work (“SOW”) describes Onboarding Services to be performed by Branch for Customer (each a “party”, collectively “Parties”) to the extent Customer has purchased Onboarding Services, as set forth in Customer’s Order Form. By executing an Order Form that references this SOW, Customer agrees to the terms of this SOW and the Professional Services Terms & Conditions available at <https://legal.branch.io/#professional-services> (the “PS Terms”).

Any capitalized terms not otherwise defined herein shall have the meaning set forth in the PS Terms.

**I. SCOPE OF SERVICES.** Branch PS will provide Customer with resources to assist Customer’s staff as set forth below (the “Project”), subject to Customer’s payment of all applicable fees as set forth in the applicable Order Form. Branch PS and Customer (collectively, the “Project Team”) will commit resources to work on the Project. In providing the Onboarding Services hereunder, Branch PS will employ reasonable, industry-standard Onboarding processes and activities.

Service	Onboarding Service Description
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## Discovery

- Conduct remote discovery sessions to assist with identifying integration requirements for key use cases to work within client tech stack
- Provide assistance with defining Branch integration strategy to leverage deep linking and channel best practices
- Assist Customer in identifying new opportunities to drive additional value from Branch within existing and new channels
- Provide guidance with the creation and execution of Customer's business case in implementing Branch's Services

## Engagement Management

- Provide guidance and assistance identifying key integration tasks, owners, and dependencies to support sprint planning
- Assist Customer in tracking and communicating task completion and next steps with project stakeholders
- Actively monitor for and escalate integration risks and issues



<p><b>Engagement Support</b></p>	<ul style="list-style-type: none"> <li>• Assist customer with building links for testing, and social/email/ads/site campaigns</li> <li>• Support the creation of Journeys and Deepview templates</li> <li>• Provide guidance and support to Customer in creating custom link builders, test pages, webhooks, and API scripts to streamline integration usage</li> <li>• Support analytics tagging strategy, retrieval of Branch data, and creation of performance reporting and collateral</li> </ul>
<p><b>Software Configuration</b></p>	<ul style="list-style-type: none"> <li>• Support configuration of default redirect, social, and domain settings</li> <li>• Assign and coordinate user access permissions</li> <li>• Support setup of premium feature (Journeys, Email, Ads, Analytics) dashboard configurations</li> </ul>
<p><b>Enablement</b></p>	<ul style="list-style-type: none"> <li>• Conduct training sessions for project stakeholders on content which may include Branch functionality, Premium features, Specific Use Cases, and Dashboard Usage</li> </ul>

**II. PROJECT ROLES AND RESPONSIBILITIES.** This is a list of Project roles, NOT individuals, required to complete the Project. A single individual may take responsibility for any number of roles, or a single role may require more than one individual. Customer acknowledges its participation is critical for Project success.



Role	Branch PS	Customer
<p><b>Sponsor</b></p>	<p>Responsible for allocating Branch PS resources</p> <ul style="list-style-type: none"> <li>• Serve as escalation contact for issues not resolvable by Branch Project Manager (“PM”)</li> <li>• Advises the Branch PS team</li> <li>• Manages project resources</li> </ul>	<p>Responsible for providing Customer resources needed for successful onboarding, and promote process change where necessary</p>
<p><b>Project Manager</b></p>	<p>Responsible for oversight of Branch PS resources, schedules. Supporting responsibilities include:</p> <ul style="list-style-type: none"> <li>• Attending all key Project meetings</li> <li>• Being a point of contact for day-to-day operations</li> <li>• Providing guidance and assistance for management of Project issues</li> <li>• Leading Project meetings</li> </ul>	<p>Responsible for the oversight of Customer resources, schedules and responsibilities including:</p> <ul style="list-style-type: none"> <li>• Attending all key Project meetings</li> <li>• Being a point of contact for day-to-day operations</li> <li>• Securing participation (as required) of key business process owners</li> <li>• Participating in Project meetings</li> </ul>



Role	Branch PS	Customer
<b>Administrator</b>	N/A	<p>Responsible for ongoing Branch administration, once onboarding is complete</p> <ul style="list-style-type: none"> <li>• Manage user acceptance tasks, including QA testing, training and adoption</li> <li>• Manage organization's ongoing Branch use</li> </ul>
<b>Functional Consultant(s) / Business Process Owner(s)</b>	<p>Responsible for providing leadership and guidance on the overall usage of Branch</p> <ul style="list-style-type: none"> <li>• Define Branch integration strategy</li> <li>• Support ongoing onboarding setup</li> <li>• Conduct training of Branch best practices</li> <li>• Support QA of Branch integration</li> </ul>	<p>Responsible for review and acceptance of Branch integration, and identification of exceptions/risks</p> <ul style="list-style-type: none"> <li>• Attend Project meetings related to area of ownership</li> <li>• Assist in the definition of unique processes outside of standard Branch practices</li> <li>• Participate in user acceptance testing activities</li> </ul>
<b>Extended Team</b>	<p>As needed Branch PS resources (including Solution Architects, Subject Matter Experts, Technical and/or Education resources) to support the scope of the Project</p>	<p>Additional Customer resources as needed to support the scope of the Project</p>

**III. ONBOARDING SERVICE ASSUMPTIONS.** Unless otherwise noted in this SOW or agreed to in

writing by the Parties, the following assumptions are based on information provided by the Customer relating to the Project and have been used to estimate Branch PS's required level of effort and fees. Deviations from these assumptions may lead to commensurate changes in the timeline and fees and will be handled through a formal Change Order.

- A. **Term Length:** Unless otherwise agreed upon by both Parties and duly executed in writing, the obligation of Branch to provide Onboarding Services under this SOW expires after the timeframe identified in the Order Form, following the SOW "Effective Date."
- B. **Reasonable Work Hours:** Customer agrees that (1) Branch PS staffing commitments ("Staffing Commitments") include up to the amount set forth in the Order Form (if any); (2) Staffing Commitments in this SOW may not have been fully scoped, and there is no assurance that the work identified by the Customer for Branch PS subject to Staffing Commitments can be completed within the time period scoped or even that such work can be completed at all; (3) Branch PS reserves the right to reject any request for work identified by Customer to be provided by Branch PS as Staffing Commitments, if Branch PS reasonably believes such work is outside of the type of services normally provided by Branch PS; and (4) Staffing Commitments may be consumed by Branch PS in completing preparations for meetings, completing offline research, and completing offline configurations or other action items.
- C. **Overages:** Branch PS will secure Customer's approval to bill against overages that exceed initial Staffing Commitments before the provisioning of any such overage services.
- D. **Cancellation / Postponement:** Branch PS and Customer will use commercially reasonable efforts to attend all scheduled Project meetings. The repeated cancellation of Project meetings may result in Project delay and additional costs.

**IV. CUSTOMER RESOURCE AVAILABILITY.** Project timeline estimates provided by Branch PS are dependent on the availability of Customer resources and key decision makers. Lack of access to or the material change to resources and/or Project stakeholders may impact estimated timelines and whether additional Onboarding Services may be needed. Customer is responsible for acknowledging, reviewing, and responding to communications from Branch PS to support this Project. Some integration features may require Customer's contractual signature / e-signature with a third party before Branch PS can continue with the provisioning of services, and Customer is responsible for

responding and executing such third party agreements in a timely and collaborative fashion.

Customer is responsible for any engagement and management of third-party vendors that Customer uses in conjunction with Branch. Customer will provide relevant contacts and subject matter experts in a timely fashion to be made available for any necessary work to conduct this SOW according to a mutually agreed upon Project schedule. Should Customer choose not to go live with any aspect of the deployment, and then at a future date need additional Onboarding Services, this will require another statement of work or Change Order to extend the Onboarding Services term and may result in additional costs. **V. FEES.** Customer will pay Branch for the Onboarding Services at the rates specified in the applicable Order Form.