



## BLUECORE PLATFORM IMPLEMENTATION SERVICES

*\*\*\*Customer is responsible for maintaining any JavaScript snippet or existing integration required by Bluecore to maintain the Platform on the Customer Site(s) and to provide the Services to Customer.\*\*\**

### **Implementation: Triggers**

#### **Services Staffing** (*Deliverability services are not included*):

Bluecore will assign the following Implementation Services resources to engage with Customer's team for the implementation of the Platform:

- Client Onboarding Manager ("**COM**"): The COM will lead the Bluecore implementation and be the primary point of contact for Customer. The COM will be responsible for coordinating project deliverables, timelines, and activities with the Customer's Project Manager
- Forward Deployed Engineer ("**FDE**"): The FDE will be responsible for the technical aspects of the implementation, and will work with Customer's technical team to ensure all technical integration activities are tuned, integrated, and tested in Customer's environment

#### **Website Integration:**

Bluecore will integrate and maintain the Platform with the Customer Site(s) listed in the applicable SOW, either via an eCommerce platform integration (if available) or via a front-end JavaScript-based integration solution. This integration allows the Platform to capture end-user interactions with the Customer Site(s). Integration to additional Customer Sites may be purchased pursuant to Bluecore's Additional Namespace offering.

#### **Language:**

Bluecore will capture website and end-user behavior data in one (1) language per Customer Site and configure the campaigns in the same language. Data capture in additional languages is available as part of the Bluecore's Additional Namespace offering described below. Campaign versioning may be purchased pursuant to Bluecore's Professional Services add-ons offerings.

#### **Currency:**

Bluecore will capture price information from the Customer Site(s) in one (1) currency and configure the campaigns (if requested) in the same currency. Data capture in additional currencies is available as part of Bluecore's Additional Namespace offering described below. Campaign versioning may be purchased pursuant to Bluecore's Professional Services Add-ons offerings.

#### **Event-Driven Triggers:**

Bluecore will configure up to three (3) Event-Driven Triggers based on Customer requirements provided during project kickoff. An "**Event-Driven Trigger**" is a personalized communication triggered based on end-user behavior on the Customer Site. Personalization may be configured using the Bluecore Visual Template Editor ("**VTE**"). Bluecore will provide up to three (3) touches or changes per Event-Driven Trigger configuration. Additional configurable or customizable Event-Driven Triggers created by Bluecore may be purchased pursuant to Bluecore's Professional Services add-ons offerings.

#### **Data Feed:**

Under certain circumstances an import data feed may be required for the Platform integration to capture historic and/or ongoing end-user, behavioral event, purchase, or product data. In addition, Customer may request a periodic export of certain analytics or end-user behavior from the Platform. This service may be purchased separately as part of a Technical Services package. The Implementation Services outlined in this section cover the design and delivery of data feeds (import and/or export) necessary for Customer to launch the Platform.

**Launch Schedule & Deliverables:**

- During the launch process, Bluecore will provide the following assistance and guidance during Bluecore’s normal business hours:
  - Assistance and guidance on testing and implementation on the Customer Site(s) leveraging Bluecore’s testing approach and instructions, if not currently a Bluecore customer
  - Initial training and access to real-time analytics on campaign performance through the Platform
  - API documentation for setup of transactional Email Sends
  - Access to Bluecore Knowledge Base through the Support portal
  - Access to live and recorded training sessions via the Knowledge Base, as such sessions are made available by Bluecore

For a timely and successful launch of Bluecore, Customer agrees to:

- Deploy Bluecore tracking to the Customer Site(s) via one of the following methods:
  - Deployment of the Bluecore tracking snippet to all pages of the Customer Site(s), and deployment of the Bluecore purchase pixel to each Customer Site’s order confirmation page
  - Implementation of a Bluecore standard integration API on the Customer Site(s)
- Ensure that the email template design(s) and iterations on such design(s) adhere to Bluecore design guidelines and are supported by Bluecore’s VTE
- Provide any applicable creative in Photoshop Document (PSD) format
- Provide files of active users (i.e. those with a last email open date within the previous 365 days)
- Provide a full list of opted-in users
- Provide a historical list of user unsubscribe email addresses
- Provide all necessary authentication items required for Bluecore to perform the Services under the applicable SOW, including without limitation API keys or user logins
- *For new Bluecore Customers:* Provide at least two (2) years of historical purchase data (i.e., the minimum amount of data required to train Bluecore’s predictive models)
- Provide additional assistance and other information reasonably requested by Bluecore from time to time

In addition, Customer agrees to one (1) of the following methods in order for Bluecore to sync unsubscribed email addresses with the Customer email marketing list, if necessary:

- Deployment of the Bluecore unsubscribe pixel to the unsubscribe pages of the Customer Site(s);
- A current list of unsubscribed email addresses, sent periodically to an SFTP location on a defined time schedule; or
- A historical list of user unsubscribe email addresses

Bluecore intends to launch the Platform with Customer in the most effective and efficient manner as mutually agreed upon during the kickoff meeting. Customer acknowledges that its delays in meeting timelines may require reallocation of Bluecore resources, and may delay the launch date by a significant timeframe (to be determined on a case-by-case basis). Bluecore will have no liability with respect to such delays.

### **Implementation: Triggers & Batch**

(Includes all bullets in the 'Implementation: Triggers' section above, as well as the following):

#### **Services Staffing:**

Bluecore will assign the following Implementation Services resources to engage with Customer's team for the implementation of the Platform:

- Deliverability Team ("**DEL**"): The DEL is responsible for providing the DNS/IP setup and volume warm up plan with audience creation. High-impact alerting (<75% Daily Delivered) is also available\*

*\*Blacklist mitigation and/or remediation services are not included, but may be purchased pursuant to Bluecore's Professional Services add-ons offerings.*

#### **Domain/IP Warm Up Plan:**

If Customer purchases Bluecore Batch or Transactional Email Sends, and these emails will be sent by Bluecore (as opposed to an external ESP), Bluecore may create a Domain/IP Warm Up Plan. A "**Domain/IP Warm Up Plan**" is a predetermined schedule for gradually increasing the volume of email sent on an email-sending domain with a dedicated IP address. Information requested by Bluecore from Customer will be used as the basis of any Domain/IP Warm Up Plan.

*\*Black list mitigation and/or remediation services are not included, but may be purchased pursuant to Bluecore's Professional Services add-ons offerings.*

#### **Preference Center, Transactional Emails & Batch Email Templates:**

If Customer purchases Bluecore Batch, Preference Center, Transactional Emails, and/or Batch Email Templates may be purchased pursuant to Bluecore's Professional Services add-ons offerings.

### **Implementation: Batch**

#### **Services Staffing:**

For existing Customers looking to migrate their full email program to Bluecore, Bluecore will assign the following Implementation Services resources to engage with Customer's team:

- COM: The COM will lead the program migration and be the primary point of contact for Customer for migration-specific tasks. The COM will be responsible for coordinating project deliverables, timelines and activities with the Customer's Project Manager
- FDE: The FDE will be responsible for the technical part of the migration and work with Customer's technical team to ensure all technical integration activities are tuned, integrated and tested in Customer's environment
- DEL: The DEL will be responsible for providing the DNS/IP Setup and volume warm up plan with audience creation. High-impact Alerting (<75% Daily Delivered) is also available\*

*\*Blacklist mitigation and/or remediation services are not included, but may be purchased pursuant to Bluecore's Professional Services add-ons offerings.*

#### **Domain/IP Warm Up Plan:**

If Customer purchases Bluecore Batch or Transactional Email Sends, and these emails will be sent by Bluecore (as opposed to an external ESP), Bluecore may create a Domain/IP Warm Up Plan (defined above).

*\*Blacklist mitigation and/or remediation services are not included, but may be purchased pursuant to Bluecore's Professional Services add-ons offerings.*

**Batch Email Templates:**

Bluecore will configure up to three (3) campaign templates based on Customer requirements provided during project kickoff. Personalization may be configured using the VTE (defined above). Additional configurable or customizable campaign templates created by Bluecore may be purchased pursuant to Bluecore's Professional Services add-ons offerings.

**Preference Center & Transactional Emails:**

If Customer purchases Bluecore Batch, Preference Center and Transactional Emails may be purchased pursuant to Bluecore's Professional Services add-ons offerings.

**Launch Schedule & Deliverables:**

- During the migration process, Bluecore will provide the following assistance and guidance during Bluecore's normal business hours:
  - Assistance and guidance on testing and implementation on the Customer Site(s) leveraging Bluecore's testing approach and instructions, if not currently a Bluecore customer
  - Initial training and access to real-time analytics on campaign performance through the Platform
  - API documentation for setup of transactional Email Sends
  - Access to Bluecore Knowledge Base through the Support portal
  - Access to live and recorded training sessions via the Knowledge Base, as such sessions are made available by Bluecore

For a timely and successful launch of Bluecore, Customer agrees to:

- Ensure that the email template design(s) and iterations on such design(s) adhere to Bluecore design guidelines and are supported by Bluecore's VTE
- Provide any applicable creative in Photoshop Document (PSD) format
- *If not already being received by Bluecore, provide:*
  - files of active users (i.e. those with a last email open date within the previous 365 days),
  - a full list of opted-in users
  - a historical list of user unsubscribe email addresses
  - all necessary authentication items required for Bluecore to perform the Services under the applicable SOW, including without limitation API keys or user logins
- Provide additional assistance and other information reasonably requested by Bluecore from time to time

**Implementation: Site****Services Staffing:**

For a new or existing Customer looking to implement Bluecore Site, Bluecore will assign the following Implementation Services resources to engage with Customer's team:

- COM: The COM will lead the Bluecore implementation and be the primary point of contact for Customer. The COM will be responsible for coordinating project deliverables, timelines and activities with the Customer's Project Manager
- FDE: The FDE will be responsible for the technical part of the implementation and work with Customer's technical team to ensure all technical integration activities are tuned, integrated and tested in Customer's environment

**Website Integration:**

Bluecore will integrate and maintain the Platform with the Customer Site(s) listed in the applicable SOW, either via an eCommerce platform integration (if available) or via a front-end JavaScript-based integration solution to support Bluecore Site programs. This integration allows the Platform to serve content on the Customer Site(s). Integration to additional Customer Sites may be purchased pursuant to Bluecore's Additional Namespace offering.

#### **Capture, Event-Driven, Social Proofs or Onsite Recommendation Campaigns:**

There are four (4) categories of campaigns Bluecore can support through Bluecore Site: lead capture, event-driven, onsite recommendations, or social proofs. Bluecore will configure up to three (3) site campaigns or (1) social proof campaign with A/B testing built out based on Customer requirements provided during project kickoff. Event-driven Site campaigns are personalized communications triggered based on end-user behavior on the Customer Site(s). Personalization may be configured using Bluecore's VTE. Additional configurable or customizable Site campaigns created by Bluecore may be purchased pursuant to Bluecore's Professional Services add-ons offerings.

#### **Implementation: SMS**

##### **Services Staffing:**

For a new or existing Customer looking to implement Mobile Messaging with Bluecore, Bluecore will assign the following Implementation Services resources to engage with Customer's team:

- COM: The COM will lead the Bluecore implementation and be the primary point of contact for Customer. The COM will be responsible for coordinating project deliverables, timelines and activities with the Customer's Project Manager
- FDE: The FDE will be responsible for the technical part of the implementation and work with Customer's technical team to ensure all technical integration activities are tuned, integrated and tested in Customer's environment

##### **SMS Integration:**

Bluecore will set up a Mobile Messaging integration with the Platform to ensure the required Customer, opt-in and unsubscribe data is properly configured. This integration allows the Platform to configure Mobile Messaging. This includes configuration of global Mobile Messaging settings.

##### **Sending Code Acquisition:**

Bluecore will set up a high throughput toll-free Mobile Messaging number. This number is used to send Mobile Messaging campaigns. Follow the steps outlined in this article to learn more about how to choose a high throughput toll-free number and create a number in the Mobile Messaging integration. Short codes (a five or six digit phone number used to send and receive Mobile Messaging) is not included, but may be purchased separately.

##### **SMS Campaigns:**

Bluecore will configure up to three (3) Mobile Messaging campaigns based on Customer requirements provided during project kickoff. Additional configurable or customizable Mobile Messaging campaigns created by Bluecore may be purchased pursuant to Bluecore's Professional Services add-ons offerings.

#### **Implementation: Additional Namespace**

##### **Services Staffing:**

For a new or existing Customer looking to implement Bluecore Site, Bluecore will assign the following Implementation Services resources to engage with Customer's team:

- COM: The COM will lead the Bluecore implementation and be the primary point of contact for Customer. The COM will be responsible for coordinating project deliverables, timelines and activities with the Customer's Project Manager
- FDE: The FDE will be responsible for the technical part of the implementation and work with Customer's technical team to ensure all technical integration activities are tuned, integrated and tested in Customer's environment

**Website Integration:**

Bluecore will integrate and maintain the Platform across one (1) additional geography, currency, or language for the Customer Site(s) listed in the applicable SOW, either via an eCommerce platform integration (if available) or via a front-end JavaScript-based integration solution. This integration allows the Platform to capture end-user interactions with the Customer Site(s). Integration to additional Customer Sites may be purchased pursuant to Bluecore's Additional Namespace offering.

*\*\*Any additional encoding or design-related technical services to be performed by Bluecore may extend the project scope and incur additional fees.\*\**