

Professional Services Product Terms

The following additional product terms apply when the Client purchases Professional Service for its instance of BoardDocs, which are identified as:

- BoardDocs Policy Migration Service Word Import;
- BoardDocs Policy Migration Service Manual;
- BoardDocs Policy Precision Formatting After Word Import;
- BoardDocs Policy Linking Legal Citations; and/or
- BoardDocs Policy Linking Cross-References.

Notwithstanding anything in the below table, the actual commencement date and duration is contingent on Diligent’s resource availability and the number of other Professional Services already in its queue. The implementation specialist assigned to the project will work with the customer to determine the start date for the commencement of Professional Services in writing.

Professional Service	Average Duration	Key Activities	Your Responsibilities	Constraints / Exclusions
BoardDocs Policy Migration Service Word Import	1 to 2 Weeks	General Activities (up to 6 hours)		-Policy documents in non-Word formats (such as a PDF)
		Project Kick-off & Oversight		
		-Contact with subscriber to discuss expectations. -Receipt of viable Word documents for import -Import of policy documents provided by customer	-Meeting with policy implementation specialist to discuss expectations and project timelines. -Provide viable Word documents in a timely manner.	
		Training Activities (up to 3 hours, does not include customer editing)		
		Enablement Training		
		-Post-import training on policy document editing -Customer editing of imported policy documents completed -Training on policy management, including general site navigation and options, including granting user access	-Attend post-import training -Editing of imported policy documents -Attend policy management training	
BoardDocs Policy Migration Service Manual	3 to 6 Weeks	General Activities (up to 8 weeks)		N/A
		Project Kick-off & Oversight		
		-Contact with subscriber to discuss expectations and specifications -Migration of customer’s policy	-Meeting with policy implementation specialist to discuss expectations and project timelines	

		documents using a manual creation method in the customers BoardDocs site -Precision formatting of customer's policy documents	-Providing policy documents in PDF format in a timely fashion	
		Training Activities (up to 2 hours)		
		Enablement Training		
		-Training on policy management, including general site navigation and options, including granting user access	-Attend policy management training	
BoardDocs Policy Precision Formatting after Word Import	2 to 4 Weeks	General Activities		N/A
		Project Kick-off & Oversight		
		-Contact with subscriber to discuss expectations and specifications -Formatting of all policies in the customer's BoardDocs site	-Meeting with policy implementation specialist to discuss expectations and project timelines -Providing viable Word documents in a timely fashion	
		Training Activities (up to 2 hours)		
		Enablement Training		
		-Training on policy management training, including general site navigation and options, including granting user access.	-Attend policy management training	
BoardDocs Policy Linking Legal Citations	1 to 2 Weeks	General Activities		N/A
		Project Kick-off & Oversight		
		-Contact with subscriber to discuss expectations and specifications -Linking legal citations in all policy documents in the customer's BoardDocs site	-Meeting with policy implementation specialist to discuss expectations and project timelines -Providing documentation of necessary legal citations for each policy document in a timely fashion	
		Training Activities (up to 2 hours)		
		Enablement Training		
		-Training on policy management, including general site navigation and options, including granting user access.	-Attend policy management training	

BoardDocs Policy Linking Cross-References	1 to 2 Days	General Activities		N/A
		Project Kick-off & Oversight		
		-Contact with subscriber to discuss expectations and specifications -Linking cross-reference for all policy documents in the customer's BoardDocs site	-Meeting with policy implementation specialist to discuss expectations and project timelines -Providing documentation of necessary cross-references for each policy document in a timely manner	
		Training Activities (up to 2 hours)		
		Enablement Training		
-Training on policy management, including general site navigation and options, including granting user access	-Attend policy management training			