

# Professional Services Menu

Delivery of all Professional Services are subject to receipt of an executed order form and subject to availability, backlog and scheduling.

## Remote Training

### Select Training

- ✓ Tailored to Customer trade/business
- ✓ Up to 15-user classes
- ✓ 1 Day: four 1.5-hour sessions:
  - Mastering the Basics
  - Advancing Your Skills
  - Items and Assemblies
  - Estimates and Proposals
  - Q&A Session

### Train the Trainer

- ✓ Recommended for 40+ users or multi-location
- ✓ STACK Trainer Certification Program
- ✓ 1 Day: four 1.5-hour sessions:
  - Mastering the Basics
  - Advancing Your Skills
  - Items and Assemblies
  - Estimates and Proposals
  - Q&A Session

### Refresh/Delta Training

- ✓ Includes 1 training session/quarter (up to 1.5-hour sessions) during subscription period reviewing new features and platform changes.

### 1:1 Training

- ✓ Standard "Professional Level"
  - Small Group training to learn the basics
  - Two 45-min sessions with a live trainer
  - Q&A Session

## Onsite Training

### 1-Day Training Session

- ✓ Up to 15-user classes
- ✓ Four 1.5-hour sessions:
  - Mastering the Basics
  - Advancing Your Skills
  - Items and Assemblies
  - Estimates and Proposals

*Exclusive of Travel Expenses*

### 2-Day Training Session (Recommended)

- ✓ Up to 15-user classes
- ✓ Four 1.5-hour sessions, plus two Q&A sessions:
  - Day 1:
    - Mastering the Basics
    - Advancing Your Skills
    - Additional Q&A Session
  - Day 2:
    - Items and Assemblies
    - Estimates and Proposals
    - Additional Q&A Session

*Exclusive of Travel Expenses*

### Train the Trainer

- ✓ Recommended for 40+ users or multi-location
- ✓ STACK Trainer Certification Program
- ✓ 1 Day: four 1.5-hour sessions:
  - Mastering the Basics
  - Advancing Your Skills
  - Items and Assemblies
  - Estimates and Proposals
  - Q&A Session

*Exclusive of Travel Expenses*

*2 Day options available upon request*

# Professional Services Menu

Delivery of all Professional Services are subject to receipt of an executed order form and subject to availability, backlog and scheduling.

## Program Management

### STACK Program Management (“White Glove”)

- ✓ A dedicated STACK Program Manager will be assigned to guide you through the implementation process. The Program Manager will coordinate and schedule Training, Item & Assembly and API Support, as applicable. Through regular progress meetings and check-ins, your Program Manager will ensure a successful onboarding experience.

## Items & Assemblies

### Knowledge Transfer

- ✓ Includes up to 4 or 8-hours (in 2-hour intervals) of dedicated time with an Items/Assembly Subject Matter Expert

### Monthly Subject Matter Expert Sessions

- ✓ Includes dedicated time with STACK Subject Matter Experts throughout Subscription Period
- ✓ Up to 4 hours/month in 30-min sessions scheduled 24-hours in advance

### Item Migration

- ✓ Includes audit of existing systems and SME assistance with migration of Item equivalents into STACK Account. SME will assist with conversion from PDF, Excel, previous software exports, previous estimates, etc.
- ✓ Migration Sequence:
  - Discovery
  - Item Migration
  - QA/QC Review
  - Sign-Off

### Takeoff Library Build

- ✓ Includes adding Takeoff Items to Takeoff Library and adding Tags accordingly
- ✓ Average of 300 takeoff items/day

### Item & Assembly Custom Library Build

- ✓ Includes SME assistance with migration of Item & Assembly equivalents into STACK Account
- ✓ Remote Library Build
- ✓ Custom Build Sequence:
  - Discovery
  - Item Migration
  - Assembly Build
  - QA/QC Review
  - Sign-Off
- ✓ Includes weekly meetings to review progress