

Software and Service Information

Technical Account Management

1. **Applicability.** The terms contained herein apply to the extent that Client has subscribed to the Technical Account Management service via an Order Document.
2. **Overview.** Benevity's Technical Account Management service provides strategic and technical guidance to optimize the use of Benevity's platform and align it with the Client's business objectives. A named Technical Account Manager ("TAM") works closely with the Client's main administrators to support effective configuration, performance, and operational success. TAM Clients are also granted access to a dedicated incident response line, as further detailed below. TAM services will commence within two weeks of execution of the applicable Order Document.
3. **In Scope Services**
 - a. **Strategic Planning and Guidance.**
 1. Technical roadmap and strategic advisory
 2. Configuration recommendations and best-practice guidance
 3. Configuration audits and operational reviews
 4. Scheduled planning sessions (health checks, roadmap reviews, technical touchpoints)
 5. Support in planning and implementing key configuration updates
 - b. **Technical Execution.**
 1. Technical project management in coordination with the Client Success Manager
 2. Limited advisory and execution support for non-routine operational activities (e.g., campaign setup guidance, workflow optimization recommendations, reporting file maintenance for complex use cases)
 3. Technical execution for complex projects: discovery, scoping, design, configuration, testing, and post-launch support
 4. Handling of all request types within TAM's supported scope as outlined [here](#).¹
 5. Reporting and analytical support in collaboration with Benevity reporting resources
 6. Technical support for program-specific initiatives in coordination with the CSM.
4. **Out of Scope Services.** These items are not included in the TAM service and may require separate scoping, additional fees, or routing via End User Care as applicable.
 - a. Requests not submitted via B-Hive or help@benevity.com
 - b. Support for users who are not Client-designated administrators

¹ <https://b-hive.benevity.com/hc/en-us/articles/16389140565908-Spark-technical-support-requests>

- c. Requests from non-Client-affiliated and/or personal email addresses
- d. Large configuration changes or re-designs
- e. End-user technical or program support
- f. Formal product training, onboarding, or enablement activities not directly related to a specific, in-scope technical execution effort
- g. Custom software development, bespoke integrations, or modifications outside of Benevity's standard platform capabilities
- h. Data transformation, manipulation, or analysis beyond standard reporting outputs and supported reporting tools

5. Service Levels (TAM).

- a. **Service Hours:** Monday–Friday, 7:00–18:00 MST (excluding Canadian statutory holidays). Requests submitted outside Service Hours will be addressed on the next business day.
- b. **Initial Response Time:** within five (5) business hours.

6. Incident Response (bundled service). TAM service Clients are granted access to a 24/7, 365-day hotline for reporting Urgent (Severity 1) and High (Severity 2) incidents (each as defined in the [Benevity SLA](#)²). Calls are assessed by Benevity's on-call Incident Response team which coordinates cross-functional resources as required. Access to the incident response hotline does not modify the applicable service levels, resolution commitments, or remedies set out in the Benevity SLA.

7. Assumptions and Constraints.

- a. All TAM requests must be submitted via B-Hive or help@benevity.com
- b. TAM services are provided only to the Client's authorized administrators (maximum of five)
- c. Benevity may allocate additional team members to support TAM delivery as needed
- d. Service levels are dependent on request volume, complexity, and resource availability. TAM services are delivered on a reasonable-efforts basis and do not include guaranteed delivery timelines for individual requests.
- e. If program complexity increases over time, the TAM subscription may be reassessed
- f. TAM service delivery is dependent on timely Client inputs, access, and decision-making
- g. Benevity may reassign the named TAM or provide coverage through other qualified personnel at its discretion, subject to availability

8. Quarterly Reviews. After the first three (3) months of TAM service delivery, Benevity and Client will, in good faith, conduct quarterly service reviews. Quarterly reviews may

² https://b-hive.benevity.com/hc/en-us/article_attachments/27453963318292

- include an assessment of service usage, complexity, and scope, and may result in a recommendation to adjust the TAM subscription
- 9. **Defined Terms.** Capitalized terms used but not defined herein will have the meanings given in the MSA available online [here](#).³

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³ https://b-hive.benevity.com/hc/en-us/article_attachments/27453774207636