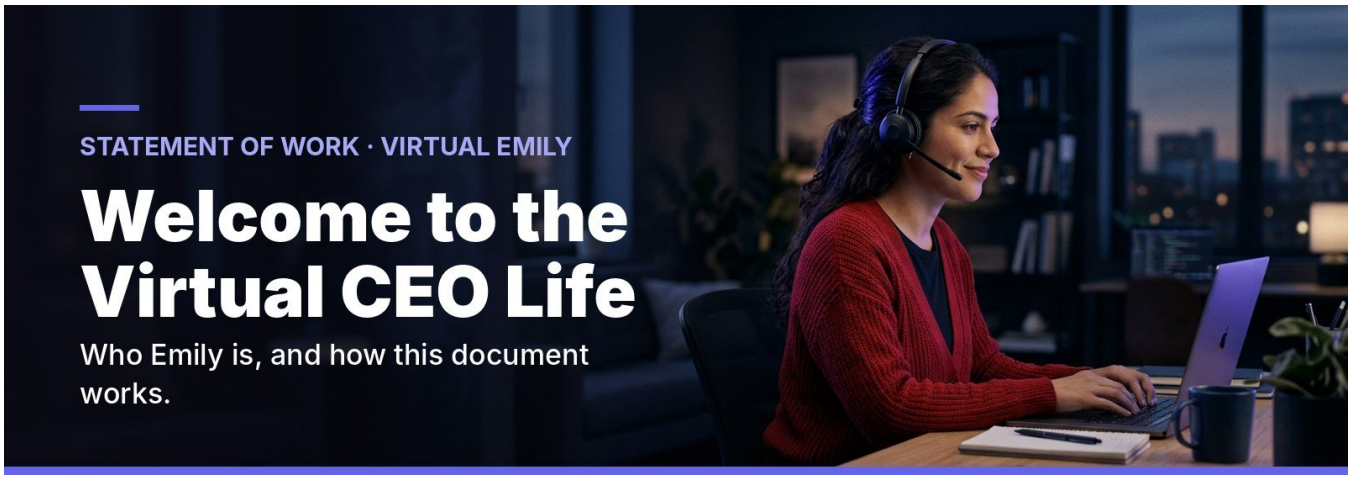
VIRTUAL EMILY · CLIENT ONBOARDING

Statement of Work

Your Emily, your goals and the way we work, agreed in writing before day one.



Virtual Emily Staffing · a Vantech company
virtualemilystaffing.com



STATEMENT OF WORK · 01

Welcome to the Virtual CEO Life

Who is Emily?

Virtual Emily is your remote executive solution: trained, bilingual professionals in Colombia, supported by technology and consulting, working as part of your team in your time zone. An Emily, not a VA.



Your Emily at the center of your operation.

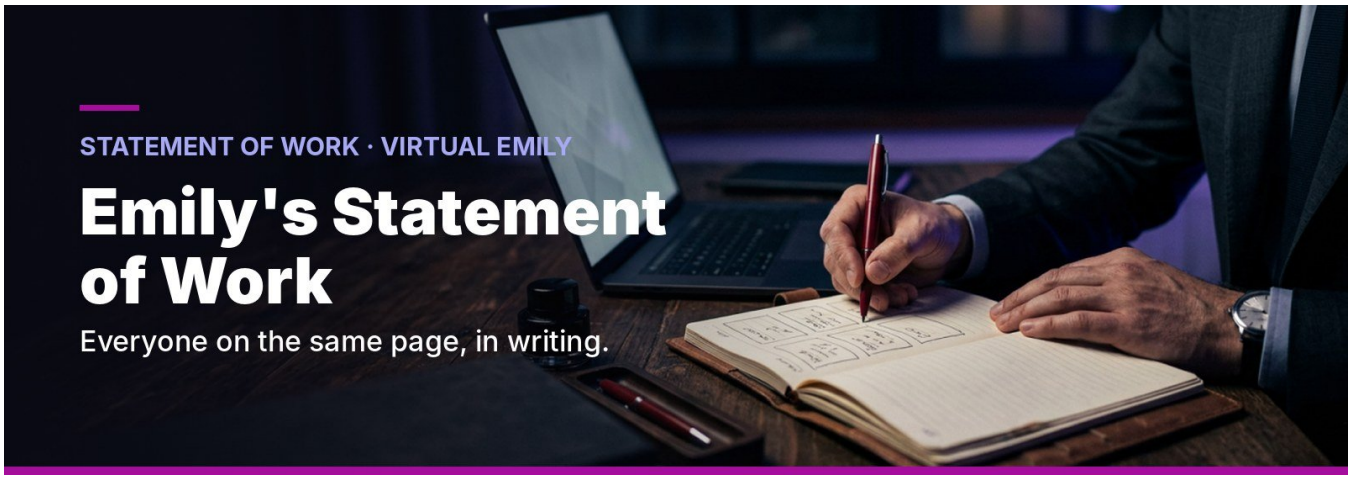
Where is Emily?

Mobile, virtual and real at the same time. Your Emily works from our hubs in Bogotá and Barranquilla and from wherever your business needs her.



Remote by design.

> **"I literally run my entire company from my smartphone."**
>
> Joe Da Silva, founder of Vantech



STATEMENT OF WORK · 02

Emily's Statement of Work

Make sure everyone is on the same page. Your goals and expectations have to be aligned with your provider and your Emily. It is unreasonable to decide the work isn't living up to expectations if you never said what the expectations were, or whether they were realistic. Write everything down and share it, so everyone involved knows where things stand and can give input. That document is your Statement of Work (SOW).



Six habits around one goal: enjoy your Virtual CEO Life.



COMMUNICATION

What are her work hours and the communication channel?

Your Emily talks to one person in your company. More than one creates communication issues.



PROJECT MANAGEMENT

Which tool do you use to monitor the work?

Microsoft Teams for to-do lists, files and conversations, and MyVirtualBPO for tasks, hours and KPIs, every day.



REPORTS

How do I know what my Emily is doing?

Give her the report template with the variables and data you need. It saves time for both of you.



AVAILABILITY

What is the procedure for urgent or work-related questions?

An Emily is like any other employee: she needs direction and time from you. If you don't have it, make sure someone in your company does.



TRAINING

How does she learn the way you work?

Dedicate time to train her on how you like the work. A screen recording is often enough.



FEEDBACK

Are you happy with the results?

Continuous feedback is how service stays at its best. Say what works and what doesn't.



VCEO LIFE

Enjoy the Virtual CEO Life experience.

Once the rhythm runs, manage by dashboard, not by hovering.

Free unlimited replacement guarantee

If a match isn't right at any point, Vantech finds and trains a replacement Emily within 7 days, at no charge, as many times as needed, for the entire duration of your agreement. The same applies if your Emily leaves Vantech: you are not charged for hiring or training her replacement.



STATEMENT OF WORK · 03

Let's get started with your Emily

Client	
Account manager	
Emily's name	
Emily type (line and role)	
Start date	

Activities to be performed by your Emily

Tick everything that applies. Anything not listed goes in "Other".

Admin

- ☐ Email and calendar management
- ☐ Invoices and payments
- ☐ Contracts and documents
- ☐ Executive and back-office support

Marketing

- ☐ Content creation
- ☐ Community management
- ☐ E-mail marketing campaigns
- ☐ Website and webmaster
- ☐ Graphic design
- ☐ Social media management
- ☐ Campaigns
- ☐ Paid ads management
- ☐ Website optimization
- ☐ Audiovisual

Sales & RevOps

- ☐ Appointment setting and meetings
- ☐ Business development
- ☐ Follow-ups
- ☐ CRM and pipeline updates

Data

- ☐ Research
- ☐ Data entry and cleanup
- ☐ Lead generation
- ☐ Lead qualification

Customer experience

- ☐ Chat support
- ☐ E-mail support
- ☐ Phone support
- ☐ Resolutions and follow-up
- ☐ Other: _____

As your Emily is specifically chosen for your needs, her commitments cannot be varied without Vantech's written consent and approval. You may be responsible for additional fees and costs for any additional duties or activities that your Emily performs at your request.

Overview

It is our commitment to provide you with an Emily who is proactive in all work-related matters, follows instructions and performs assigned tasks, makes sure all information gathered is properly recorded in the required platforms, and completes tasks on time.

Schedule

Tick your time zone and one block.

☐ EST ☐ CST ☐ MST ☐ PST

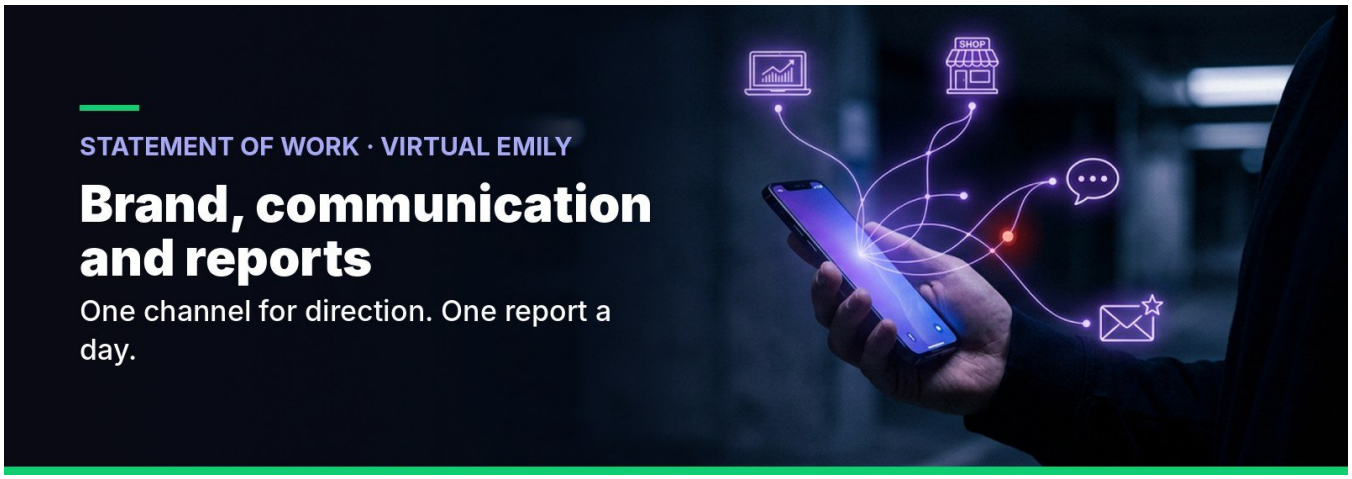
Full time	Half time (morning)	Half time (afternoon)
☐ 7:00 am – 5:00 pm	☐ 8:00 am – 12:00 pm	☐ 12:00 pm – 4:00 pm
☐ 8:00 am – 6:00 pm	☐ 9:00 am – 1:00 pm	☐ 1:00 pm – 5:00 pm
☐ 9:00 am – 7:00 pm	☐ 10:00 am – 2:00 pm	☐ 2:00 pm – 6:00 pm

* Your Emily's schedule may not be changed without Vantech's written consent and approval. Client will be responsible for any overtime fee required under applicable law.

What will your Emily have access to?

- ☐ Email account
- ☐ Website credentials
- ☐ Social media accounts
- ☐ CRM platforms
- ☐ Other: _____

Vantech and Client shall hold all Confidential Information of the other Party in the strictest confidence and shall not, during or subsequent to the term of this Agreement, use the other Party's Confidential Information for any purpose whatsoever other than the performance on behalf of Client of the Services, or disclose the other Party's Confidential Information to the other Party's employees except on a need-to-know basis or to third Parties who are under no less than the same confidentiality obligations to which the Parties are committed hereunder, and it is understood that such Confidential Information shall remain the sole property of the disclosing Party.



STATEMENT OF WORK · 04

Brand, communication and reports

Do you have a brand identity manual?

☐ Yes ☐ No

If you don't, help us understand your brand identity by sharing the following:

☐ Editable logo
☐ Primary and complementary fonts
☐ Color palette
☐ Communication tone samples
☐ Corporate brochure
☐ Graphic line samples

Communication

☐ WhatsApp Business (recommended)
☐ Microsoft Teams
☐ SMS
☐ Local US telephone line
☐ E-mail
☐ Slack
☐ iMessage
☐ Other: _____

To keep a single communication channel with your Emily, Vantech suggests WhatsApp Business as the only channel for direction. All information stays centralized and task follow-up is much easier for both parties.

* Please respect your Emily's schedule, and avoid contacting her personally or outside the work hours agreed in this document.

Something to add?

Anything else your Emily should know.

Reports

How often do you want a progress report from your Emily?

☐ Daily ☐ Weekly ☐ Monthly

Your Emily says hello in the morning and goodbye at the end of the day, sending the report of the day's tasks with a copy to your account manager. Tasks, hours and KPIs are also live on MyVirtualBPO.

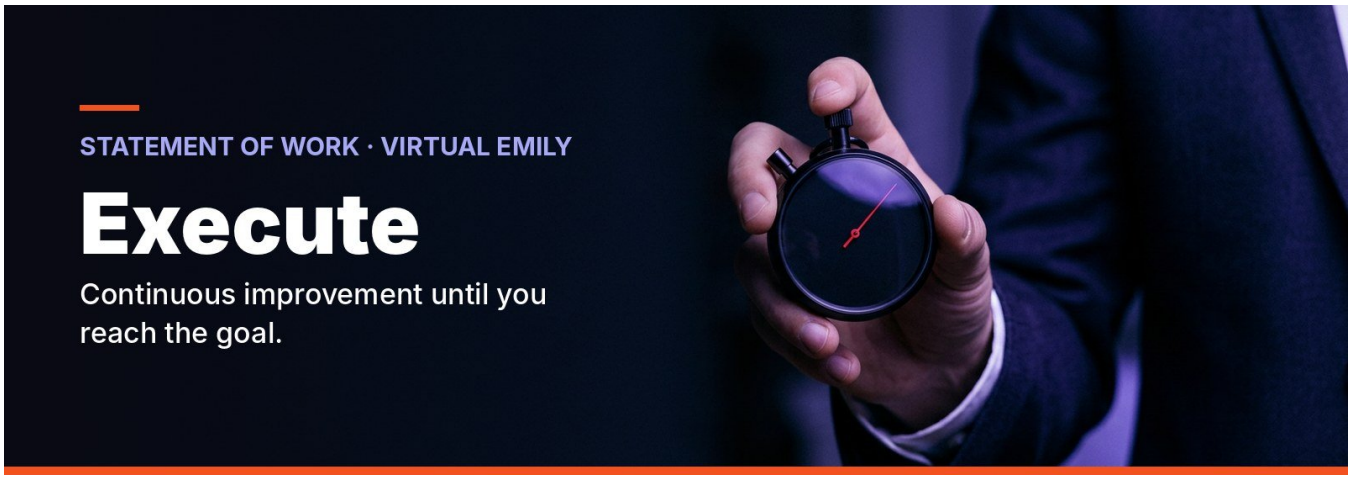
Where do you want to receive the report?

☐ MyVirtualBPO dashboard
☐ WhatsApp Business
☐ E-mail
☐ Microsoft Teams
☐ Slack
☐ Other: _____

Feedback

May your account manager ask you for feedback on your Emily's work each week?

☐ Yes ☐ No



STATEMENT OF WORK · 05

Execute

Continuous improvement until you reach the goal. Things will never be as easy as we believe them to be: there has to be constant communication and evolution of the project scope. The only way to success is constant measurement and improvement.

Things change over the course of a project, and you have to be willing to be flexible when necessary so as not to stand in the way of success. On the other hand, know which points you can't budge on and which requirements have to be met without question. That's why you wrote your Statement of Work in the first place.



Reporting, availability and continuous feedback keep the work moving.



CONTINUOUS FEEDBACK

Say what works, what doesn't and the strategy behind the work.



AVAILABILITY

Make time to give direction; every professional needs it.



REPORTING

A daily report and weekly feedback keep quality aligned.

* If you fail to comply with any of your commitments, Vantech may terminate this SOW and the Agreement immediately, and you will be responsible for any unpaid fees.



STATEMENT OF WORK · 06

Working with your Emily

A feature overview of the tools we use with you. We work inside your stack: the tools below are our defaults, and any cloud-based system you approve can replace them.

Tool	What it's for
MyVirtualBPO	Included with every Emily: tasks, hours, daily reports and KPIs on one dashboard, from your phone.
Microsoft Teams	The hub for teamwork: conversations in channels, chat, audio and video meetings, task delegation, and files you can co-author with Word, Excel, PowerPoint and OneNote.
Teams conversations	Conversations appear in the General channel and any channel you create. Everyone in a channel can see them; use mentions to bring in specific people. Files shared in a conversation go to the Files tab automatically.
Teams files	Share and co-edit Word, Excel and PowerPoint files inside Teams, and connect SharePoint, Dropbox, Box or Google Drive.
Email and calendar	Microsoft 365 (Outlook) or Google Workspace, with shared calendars for meetings and team events.
Information management	Google Drive, SharePoint or any cloud system you approve, to share and store information, messages and communications.
Slack (optional)	If your team already lives in Slack, your Emily joins your channels.



STATEMENT OF WORK · 07

Agreement terms

Non-solicitation and non-circumvention

Client's Non-Solicitation and Non-Circumvention of Vantech's Workers. During this Agreement and for a period of one (1) year following expiration or termination of this Agreement, Client agrees that it will not hire, contract with, employ, or solicit for hire, or advise or assist others with the opportunity to do the same, any Workers or agents of Vantech who have been involved in any discussion, activities, or Services that are the subject of this Agreement. Should Client contract directly or indirectly with any Vantech Worker or agent for services similar to the services supplied under this Agreement, Client shall pay to Vantech an amount equal to twenty-five percent (25%) of the annual salary and any bonuses of said Worker or agent. The "annual salary" shall be the amount that such person is paid as a salaried employee of Client or as an independent contractor if not an employee of Client. If such person will be providing services to Client either as an hourly employee or on an hourly basis as an independent contractor, then the "annual salary" shall be determined by multiplying the hourly rate paid to such person by 40 hours per week by 52 weeks per year.

Data protection

Use of Confidential Information. Vantech and Client shall hold all Confidential Information of the other Party in the strictest confidence and shall not, during or subsequent to the term of this Agreement, use the other Party's Confidential Information for any purpose whatsoever other than the performance on behalf of Client of the Services, or disclose the other Party's Confidential Information to the other Party's employees except on a need-to-know basis or to third parties who are under no less than the same confidentiality obligations to which the Parties are committed hereunder, and it is understood that such Confidential Information shall remain the sole property of the disclosing Party. The Parties further formally agree to take all reasonable precautions to prevent any unauthorized disclosure of such Confidential Information including, but not limited to, executing a mutual nondisclosure agreement containing provisions in the disclosing Party's favor substantially similar to Section 3.4 ("Confidentiality") of this Agreement. Confidential Information does not include information which (i) is independently known to a Party at the time of disclosure to the other Party as evidenced by written records of the receiving Party, (ii) has become publicly known and made generally available through no wrongful act of a Party or a third party having the obligation to maintain the confidentiality of the same, or (iii) has been rightfully received by a Party from a third party who is authorized to make such disclosure.

Billing policy

General billing

Usage of Virtual Emily services constitutes Client's acceptance of the Vantech Group LLC billing policy. Client agrees to pay Vantech Group LLC the rates set forth in this SOW and in accordance with the selected payment method and terms set out in Exhibit B attached to the Services Agreement. Unless otherwise agreed in writing, all services are set up on a prepaid basis, and payment must be received by Vantech Group LLC before any billable service is provided.

The Client agrees and understands that taxes, including VAT and any other governmental levies, will be billable by Vantech Group LLC and included on the applicable invoice and that Client is responsible for payment of the same. For the avoidance of

doubt, Client acknowledges that Vantech Group LLC has advised Client to seek its own professional or legal advice regarding the contract and as to whether it potentially creates a taxable presence for the Client or its affiliates under the jurisdiction of any taxation authority.

Vantech Group LLC will invoice Client in United States Dollars. Clients are required to keep a valid credit/debit card on file to charge for recurring monthly invoices. Clients are responsible for keeping all credit/debit card details and contact information current. This can be done by requesting the Direct Debit form from the administrative team of Vantech Group LLC.

Billing cycle

The payment will be invoiced on or before the 25th of every month. Invoices are payable within five (5) days of the invoice date. In the event Client fails to timely pay, then Vantech Group LLC shall be entitled to suspend the services it provides to Client until all outstanding amounts are paid in full. Vantech Group LLC shall be entitled to use any deposit or reserve funds provided by Client to pay for such amounts owing. Client is responsible for any fees associated with the Client's selected payment method, deductions, or currency exchange shortages that may be removed from payments before they are received by Vantech Group LLC.

Payment methods

Vantech Group LLC accepts payments via bank transfer, credit card or ACH. The Client authorizes regularly scheduled charges to his checking/savings account or credit card. The Client will be charged the amount indicated in the invoice each billing period. A receipt for each payment will be emailed and the charge will appear on the bank statement as an "ACH Debit". The Client agrees that no prior notification will be provided unless the date or amount changes, in which case the Client will receive notice at least 10 days prior to the payment being collected.

Refunds

An approved refund may be initiated by our office in the next billing period after the refund request is submitted.

Absence policy

Punctuality requirements. Virtual Assistants are expected to be at their work stations on time. Tardiness is defined as being at the work station at least 15 minutes past the scheduled starting time. The Virtual Assistant should also notify the Team Leader and Operations Manager when the Virtual Assistant knows they may be late for work.

Counting absences. Here are the rules for how absences will be counted:

- An unscheduled absence for at least one-half of the workday will be counted as one occurrence.
- Tardiness of 1 hour with a valid notice will be counted as 0.5 occurrence.
- Tardiness of 1 hour without a valid notice will be counted as one occurrence.

Occurrences roll off after 90 days, not 30.

- 2 occurrences = warning.
- 3 occurrences = termination of contract if needed, to be determined by management.

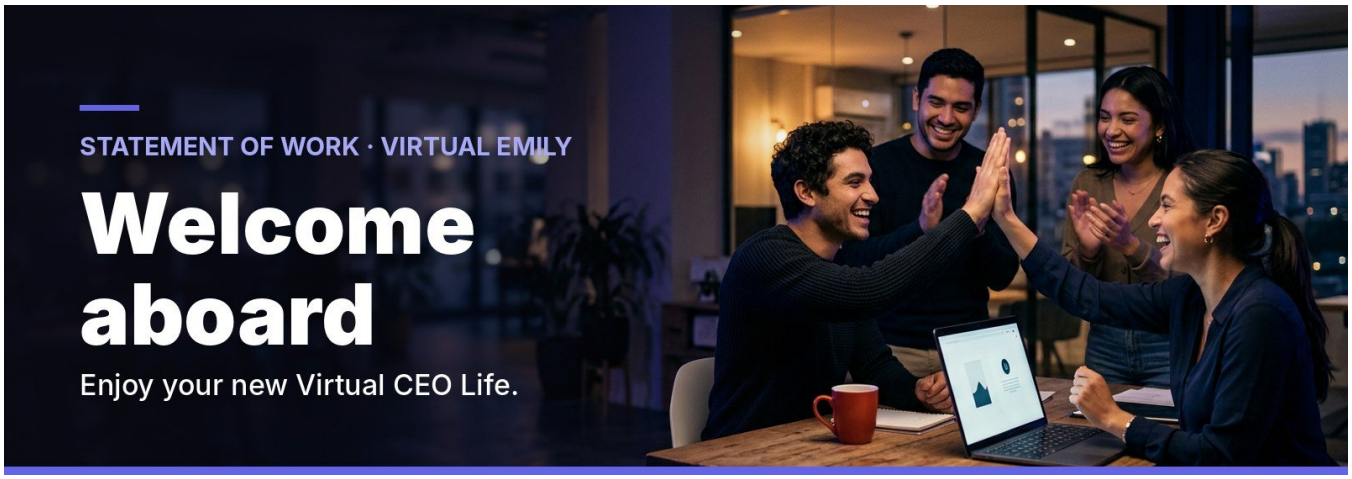
Procedure

In the event that the Virtual Assistant is unable to come to work, they should call in and let the appropriate person know, in advance where possible, but no later than the regular starting time, so that arrangements for other help can be made.

Employees may be granted excused absences for sickness or illness when the appropriate person is notified prior to the start of work. Pre-scheduled medical or professional appointments (lawyers, clergy, counselors, etc.) or other compelling reasons, with prior supervisory approval, may also be considered excused absences.

Absence of three or more consecutive scheduled working days without notifying the appropriate person will be treated as a voluntary termination, and the employee will be removed from the payroll.

Authorized absence documentation. We may require documentation of authorized reasons for absence, such as sick leave or jury duty, and may also verify the documentation where appropriate.



STATEMENT OF WORK · 08

Welcome aboard

Enjoy your new Virtual CEO Life. Your account manager will confirm this Statement of Work with you and schedule onboarding.

Agreed by

Client	**Vantech Group LLC · Virtual Emily**
Signature _____	Signature _____
Name _____	Name _____
Date _____	Date _____

Questions? Talk to your account manager, or visit virtualemilystaffing.com.

VANTECH

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