

Managed Services Order Form and Statement of Work

EFFECTIVE DATE	LAST UPDATED
September 1, 2026	September 1, 2026

This Managed Services Order Form and Statement of Work (“SOW”) is entered into under the Managed Services Master Services Agreement between **Capital Connect Solutions, Corp. d/b/a CapConnect** and the Client identified below. Capitalized terms not defined here have the meanings in the MSA. This template becomes binding only when completed and executed by both Parties.

1. Parties and Term

Client legal name: _____

Business address: _____

Primary contact / title / email: _____

Service start date: _____ Initial term: _____ Renewal: _____

Notice period / minimum commitment: _____

2. Services and Deliverables

Check and describe all included services: ☐ managed outbound sales development ☐ lead research and enrichment ☐ list building ☐ appointment setting ☐ calling ☐ email outreach ☐ SMS outreach ☐ LinkedIn outreach ☐ CRM administration ☐ campaign operations ☐ reporting and analytics ☐ automation / AI workflows ☐ consulting ☐ implementation ☐ other:

_____.

Detailed scope, markets, audiences, channels, deliverables, and exclusions:

Anything not expressly listed is excluded. Closing sales, legal review, regulatory advice, product fulfillment, customer support, paid-media spend, third-party licenses, and data purchases are excluded unless expressly included.

3. Volumes, Hours, and Service Levels

Included monthly hours / activity / usage: _____

Reporting cadence: _____ Meetings: _____

Response or support target, if any: _____

Overage rates: _____

Targets are operational goals, not warranties. Third-party platform uptime, contact availability, deliverability, pickup rates, prospect behavior, and Client responsiveness are outside CapConnect’s control.

4. Client Inputs and Dependencies

Client will provide by the agreed dates: approved positioning and claims; target criteria; exclusion and suppression lists; required consents; CRM and calendar access; sender accounts and domains; accurate product, price, and fulfillment information; brand materials; timely campaign and script approvals; and an authorized decision-maker.

Client-specific dependencies and deadlines: _____

Delays or deficiencies may shift timelines, reduce achievable activity, require a change order, or result in paid idle or reserved capacity.

5. Fees and Billing

Setup / implementation fee: \$ _____

Recurring managed-services fee: \$ _____ per _____

Usage, overage, performance, or success fees: _____

Approved expenses and third-party costs: _____

Payment method and due date: _____

Early termination / wind-down charges, if any: _____

Fees are governed by the MSA. Taxes are additional where applicable.

6. Personnel and Communications

CapConnect controls staffing and may replace personnel with reasonably qualified personnel. Named personnel, if any, indicate the initial staffing plan and are not guaranteed:

_____.

CapConnect service lead: _____ **Client owner:** _____

Approved communication and escalation channels: _____

The MSA's entity-level recourse, independent-contractor, worker-treatment, and narrowly tailored personnel non-circumvention provisions apply.

7. IP and Data Treatment

Client-owned final deliverables, if any: _____

Licensed deliverables / permitted use: _____

Client systems and data sources: _____

Special retention, deletion, export, or security requirements: _____

CapConnect retains its Background IP and CapConnect Materials, including reusable tools, prompts, playbooks, workflows, automations, processes, methods, and improvements.

8. Compliance Approvals

Client confirms it has lawful rights, notices, consents, suppression practices, and authority for all data, lists, claims, offers, domains, accounts, recordings, and instructions. Before launch, Client must approve the target audience, scripts, claims, channels, sending identities, recording approach, calling hours, opt-out handling, and suppression inputs.

Required industry or geographic restrictions: _____

Compliance owner and approval source: _____

9. Success Measures and No Guarantee

Operational KPIs: _____

Client-side KPIs and reporting source: _____

KPIs are measurement tools and planning targets unless expressly labeled a binding service level with a stated exclusive remedy. CapConnect does not guarantee leads, appointments, attendance, pipeline, sales, conversion, revenue, profit, funding, deliverability, or other business outcomes.

10. Change Orders and Acceptance

Scope changes require a written change order describing the change, pricing, dependencies, and schedule impact. Where deliverable acceptance criteria apply, Client must give specific written notice of material nonconformity within five business days after delivery or the deliverable is accepted.

Special acceptance criteria: _____

11. Special Terms and Incorporated Documents

This SOW incorporates the Managed Services Master Services Agreement and, as applicable, the Mutual Nondisclosure Agreement, Data Processing Addendum, Security Addendum, Communications Terms, AI and Automation Terms, Acceptable Use Policy, and Subprocessors and Third-Party Services policy.

Negotiated special terms: _____

If no special term is written above, none applies. This SOW overrides the MSA only where it expressly identifies the MSA section being modified.

12. Signatures

Each signer represents authority to bind the named entity. Electronic signatures and authenticated acceptance are effective as originals.

CAPITAL CONNECT SOLUTIONS, CORP.

d/b/a CapConnect

Signature: _____

Name: _____

Title: _____

Email: _____

Date: _____

CLIENT LEGAL ENTITY

Entity: _____

Signature: _____

Name: _____

Title: _____

Email: _____

Date: _____

Questions about this document may be sent to legal@capconnectsolutions.com.