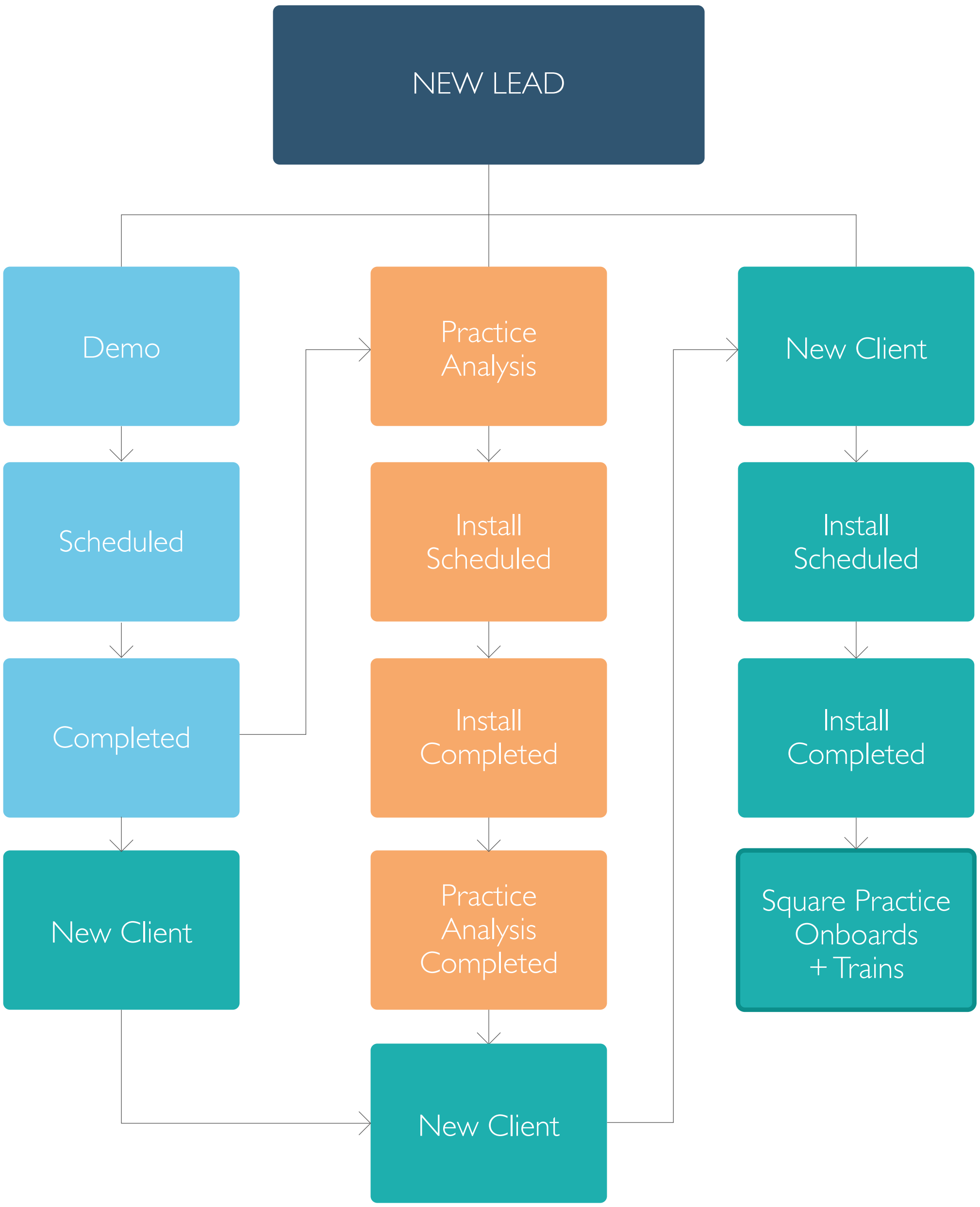
Blue - Demo
Orange - Practice Analysis
Green - New Client

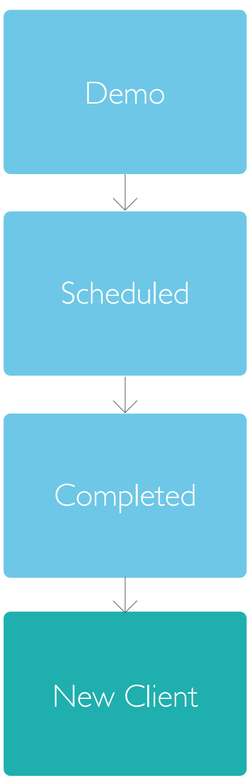


NEW LEAD ONBOARDING GUIDE

1. Demo - A first look at Square Practice.

2. Practice Analysis (PA) - An installation, sync, and review with the practice's numbers.

3. New Client (NC) - A decision has been made to come on board with or without having a Demo or PA.

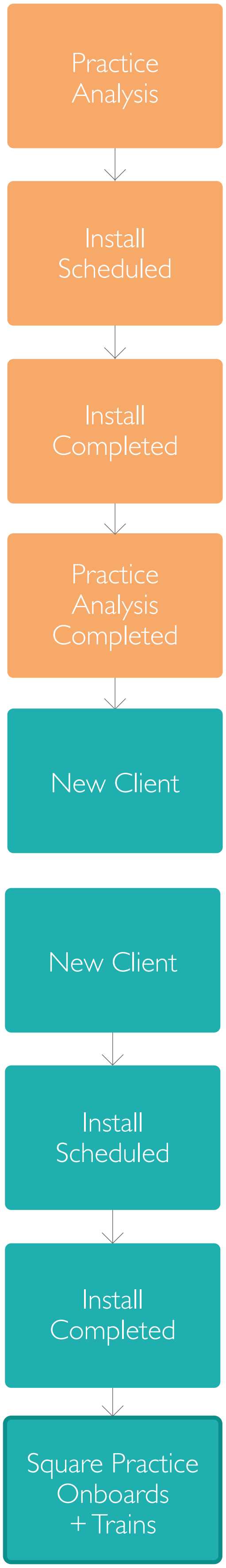


Demo

- Demos can be scheduled and performed by SP's Account Executive within the Fortune "Register a New Lead" page. Demos can also be performed by a coach at any time using the Demo account available.
- Once your request is submitted to SP, we will connect with the practice to schedule and complete the Demo.
- When the Demo is completed you will be contacted by us with an update.

Install Requests (PA or NC)

After a Demo, a practice has the option to have a Practice Analysis (PA) or become a New Client (NC). You'll submit a request on the "Register a New Lead page," selecting either PA or NC.



If you select Practice Analysis:

- A Practice Analysis allows you to see the actual data and review it with the practice using our platform. Using their real numbers vs. "demo numbers" allows for a more impactful conversation. When you select "Practice Analysis" on the "Register a New Lead" page a form is sent to the practice email provided by you.

- The form sent to them is an agreement they'll need to electronically sign allowing us to schedule and complete the install.

- On the scheduled day of the install, our support team will call the practice and install our integrator onto their server. You'll be given access once the sync is complete and be able to review their data for 30 days free of charge. (Note: Access will only be given to coaches).

- On the "Register New Lead" page, you'll also select if you'd like our Account Executive to perform a PA with the practice or if you'll be responsible for it.

- Once the PA is completed and the client has chosen to come on board. Our Account Executive will onboard and train your clients.

If you select New Client

- When you select "New Client" on the "Register a New Lead" page, a form is sent to the practice email provided by you.

- The form sent to them is an agreement they'll need to electronically sign allowing us to schedule and complete the install, billing and provide access.

- On the scheduled day of the install, our support team will call the practice and install our integrator on to their server.

- Once the install is complete our Account Executive will onboard and train the practice.