

Proposal for
B2B Direct Marketing Services
for

DrivenBI

Kathleen Douglas
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Outsourced Lead Management Services

Contract No. IPD2017051771
Date: June 7, 2017
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Suzette Cruz
Sales Executive
suzettec@callboxinc.com
3103629389
888-810-7464 Ext: 3862



Callbox Sales and Marketing Solutions
4924 Balboa Blvd., #353, Encino CA 91316 USA
www.CallboxInc.com

June 7, 2017

Kathleen Douglas

DrivenBI

Dear Kathleen,

I am very pleased to present you with this proposal for our **Multi-Touch Multi-Channel Marketing Program**. Taking into full account your business needs and sales requirements, we've crafted a proposal that provides the most comprehensive approach to executing your desired marketing strategy successfully.

This proposal is comprised of the following sections:

- A. Company Profile
- B. Service Proposition
- C. Quote for Services
- D. Acceptance
- E. Terms and Conditions

With the targeted business opportunities that Callbox will deliver for **DrivenBI**, you can look forward to gaining a stronger foothold in the market.

Thank you for your consideration. Please expect a call from us in the next few days to discuss the next steps.

Cordially yours,

Suzette Cruz

3103629389

888-810-7464 Ext: 3862

A. Company Profile



Award-winning Sales and Marketing Firm

LARGEST in
B2B Lead Management Services



Top Outsourcer
of the Year



Leading Provider
of Outsourced
Sales and
Marketing Services



Top 50
Outbound
Teleservices
Agency



Ranked No. 1
Sales Lead
Generation
Service

More than **10 years** of B2B lead management experience

Staff of over



800 sales and marketing professionals

Performing outsourced functions for
thousands of sales organizations worldwide



Multi-Touch and Multi-Channel

Voice • Email • Social • Chat • Website • Mobile

Database of more than



Decision Makers and Influencers

 **callbox**
Pipeline

Complete Lead Management and Marketing Automation

B.1. Service Proposition

1

We Assign You Your Own Team

Account Manager

To provide consultation on lead generation strategy

Dedicated Sales Development Rep(s)

To set up your appointments

Email, Social Media & Chat Specialist

To generate leads via these three channels

Research and Data Analyst

To research and build your target call list

Quality Analyst

To monitor call quality and verify validity of leads

Work Hours: 40 hours / week, 22 business days / month

2

We Build You a Targeted List of Prospects

We provide priority targets from our database of over 50 million contacts, based on the following filters:

Location

Type of Business

Business Size

- California. May be followed by Arizona, Nevada, Oregon, Washington

- Manufacturing, Retail, eCommerce, Insurance

- \$75M-\$500M

3

We Conduct Multi-Touch Multi-Channel Marketing

Voice

Email

Social

Chat

Website

Mobile

Figures denoted herein apply to one (1) Sales Development seat.

Customer Profiling & Call Marketing

With a custom call script and a targeted list, we make calls on your behalf:

No. of Calls: **160 calls per day**

Decision Makers: **50 DM Conversations per Day**

Data Verification & Updating

We collect and verify pertinent info from your prospects, ensuring you have updated and phone-verified data for use in current and future marketing efforts.

Lead Qualification

We qualify leads based on your required criteria. Each lead is reviewed and analyzed for quality and compliance to your specifications.

Appointment Setting / Call-to-Invite

We set sales appointments with qualified prospects or invite qualified prospects to attend or register for an upcoming event.

Email & Social Media Marketing

Through best effort matching with your criteria, emails will be sent to a list of potential leads:

No. of Emails: **10,000 Emails Delivered per Month**

Email Prospecting

We blast a generic email to your target prospects to create interest.

Call & Send

We send your prospects follow-up emails right after the call, and on scheduled times.

Custom Email & Landing Pages

We design and A/B test your emails and landing pages to ensure high click and conversion rates.

Web, Mobile, and Chat Support

We are in constant contact with your leads in various channels.

Lead Nurturing via Mktg Automation

We design automated marketing schemes to effectively qualify and nurture your leads. As prospects activate your triggers, e.g..opened your email or submitted a web form, we call them back or respond by email or SMS in a timely manner.

Remarketing via Banner & Text Ads

We design custom banner ads and text ads that will be shown to your Target list on Google Network websites such as Gmail, YouTube, Search Network sites.

24/7 Sales Chat Support

We provide you a chat plugin for your website, and manage all sales-related chats with your visitors 24/7. We also send you real-time notification for non-sales related chats.

Chat Engagements: **200 sales chat conversations/month***

B.2 Service Proposition

4 We Give You Full Real-time Access to your Leads via Callbox Pipeline



Manage Your Leads

- Track leads from capture to close
- Store and update contact information
- View past communications with each lead with contact history
- Assign leads to multiple sales agents
- Block-out dates and times on the Calendar to indicate availability
- Get real-time alerts for appointments
- Find the location of your next appointment through the Map feature

Monitor Your Campaign

- View recent calls made by your Callbox Rep through a live feed
- Get weekly email reports on the status of leads and appointments
- Receive regular recommendations to further improve success rates
- Monitor statistics for every mailing (Delivered, Opens, Replies)
- Download your custom reports in CSV format

Nurture Your Opportunities

- Create multiple nurturing schemes to ensure all leads are being cultivated until they're ready to engage
- Control your marketing message by customizing your emails, landing pages and forms
- Respond to your prospects in real-time as you receive notifications when they act upon your triggers
- Continually improve your campaign based on insights from detailed reporting

Also available:



Power Dialer for Salesforce

Enterprise Integration with Salesforce

- Access and dial your Salesforce contacts directly through DialStream
- View all call data as they are logged into your Salesforce account in real time
- Choose between Auto-Dial and Click-to-Dial functions
- Send customized emails to contacts and make connections on social media
- Generate call reports using the Salesforce report engine

5 What You Get

Profiled Up-to-date Contact Data

Follow-Ups And Warm Leads

Market Research Data

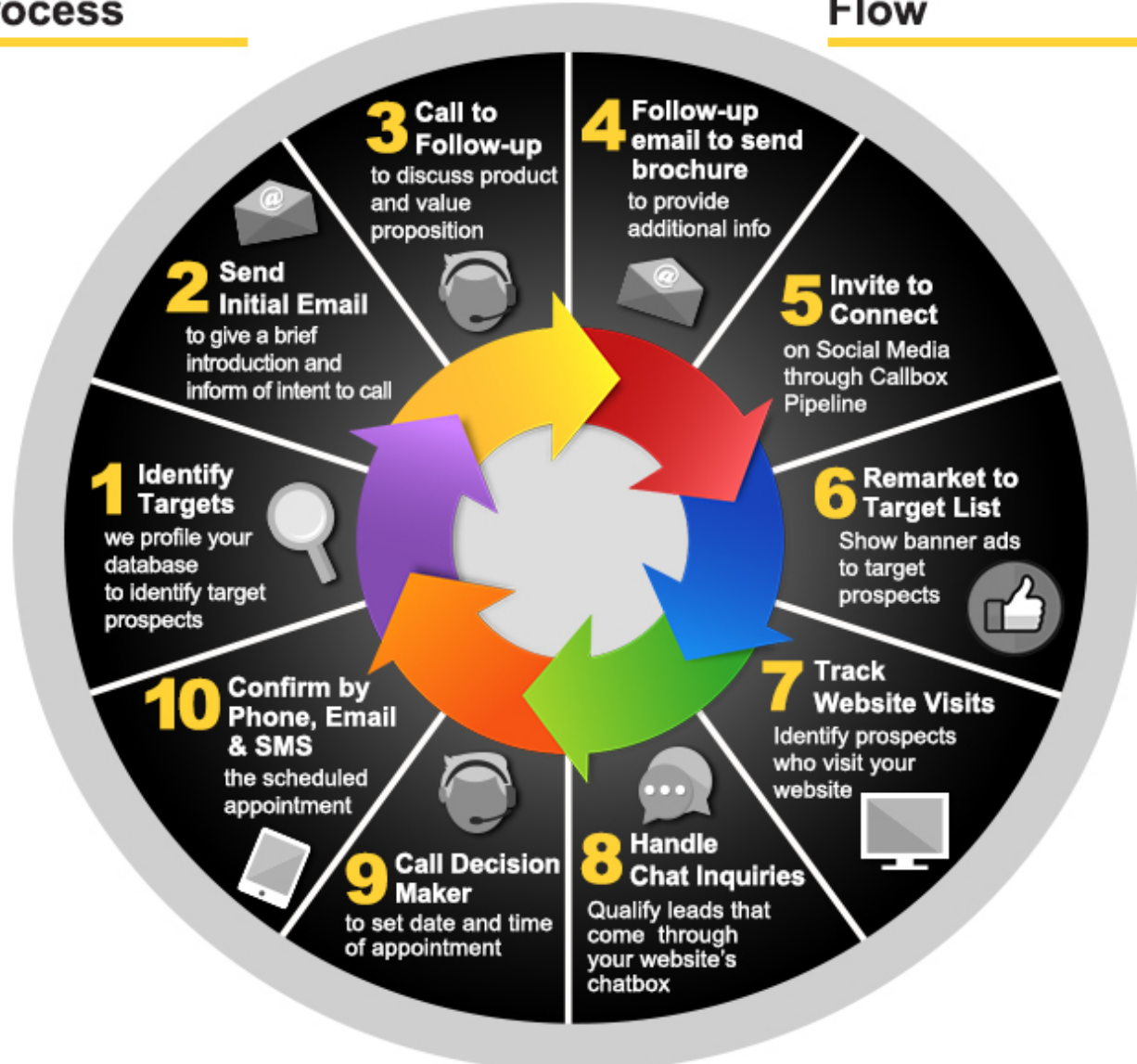
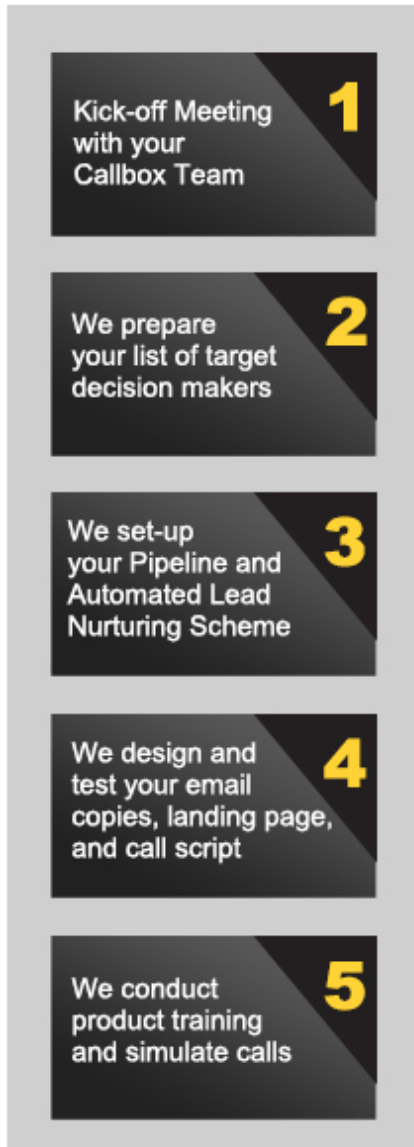
Wider Brand Exposure

Solid Sales Appointments

B.2 Service Proposition

Set-up Process

Campaign Flow



C. Quote for Services

In exchange for the aforementioned service, Client agrees to the following:

DISCOUNTED STANDARD PACKAGE - 2 MONTHS		LIST PRICE	DISCOUNT	TOTAL PRICE
TRAINING AND SET UP				
Callbox Pipeline Access Script Development Database Preparation/Research Product Training Set-up of Automated Lead Nurturing Scheme Drafting of Email Templates and Landing Pages Reporting		1,500 USD	1,500 USD	Waived
MULTICHANNEL MARKETING SERVICES				
Callbox Marketing Team will deliver (Includes Callbox Pipeline Access):				
Call Marketing & Email and Social Media Marketing	160 calls & 50 conversations per day; 10,000 emails per month	7,000 USD		7,000 USD
24/7 Chat Support and Ads Remarketing	up to 200 chat engagements & 5000 ad impressions per month			
TOTAL		8,500 USD	1,500 USD	7,000 USD

Payment Details	<p>CONTRACT PERIOD: Start Date - June 8, 2017; End Date - August 22, 2017 PAYMENT DETAILS: 1. The Total Fee is payable upon contract signing prior to the start of the initial campaign.</p> <p>2. The first half (\$3500) is payable upon contract signing. The second half (\$3500) is payable 5 days prior to the succeeding month (2nd month of the current term) or on the 3rd week of the 1st month.</p> <p>2. Forms of payment include credit card, ACH, and check. Remittances in currencies other than USD may be converted to USD. Note that conversion rates may vary..</p>
Validity	This proposal is valid until June 7, 2017.

D. Acceptance

Contract No. IPD2017051771

1 By Signing below, the Client agrees to the terms outlined in the preceding paragraphs and the succeeding Callbox Terms and Conditions.

Company: DrivenBI
Name: Kathleen Douglas
Title/Postion: Sales

Callbox Representative:
Suzette Cruz

Date: June 7, 2017

Amount: \$7,000

2 Terms of Payment:

CREDIT CARD INFORMATION

VISA MASTERCARD

We do not accept AMEX or DISCOVER
Cardholder's Name (as it appears on card):

Credit Card No: _____ **Security No.:** _____

Expiry: Month _____ **Year** _____

CARDHOLDE'S BILLING INFORMATION

Name: _____
Street Address: _____
City: _____
State: _____
ZIP / POSTAL CODE: _____

3 If you prefer the trusty fax machine, please fax the signed agreement to **(888) 277-1217**. For credit card payments, also fax a copy of both front and back of cardholder's driver's license or any valid State issued ID.

BANK / WIRE TRANSFER INFORMATION

Check if Bank Transfer Payment

Pay **Wells Fargo Bank**
Bank Account Name **Callbox Inc.**
Account # **1662288396**
Routing # **121000248**
SWIFT Code **WFBIUS6S**
Address **17232 Ventura Blvd., Encino, CA 91316**

Additional fee of \$15 applies as bank charge.

CHECK INFORMATION FOR ACH

Bank Routing No: _____

Account No: _____

Check No: _____

Amount Issued: _____

Date: _____

ACH is for US-issued check only.
For non-US checks, please indicate amount in US Dollars and mail to: 4924 Balboa Blvd. #353, Encino, CA 91316, USA

ACKNOWLEDGEMENT

I acknowledge that I am the authorized user of the account listed above. I authorized the use of the above credit card or ACH information. I acknowledge and understand the above referenced charge is for services to be rendered by Callbox Inc. I acknowledge that by providing these services, Callbox Inc. will meet its obligation for the above charge. Deposits and monies paid are non-refundable. I acknowledge that I have received a filled in copy of this agreement and of each and every other document I have signed.

SIGNATURE: _____ **DATE:** _____

I HEREBY AUTHORIZE Callbox Inc. TO CHARGE MY FINANCIAL INSTITUTION FOR THE ABOVE AMOUNT.

E. Terms and Conditions

1. TERM

This Agreement shall become effective upon the date the Client has sent a duly signed Acceptance form to Callbox, Inc..

2. RESPONSIBILITIES AND OBLIGATIONS

2.1 Callbox agrees to perform, on the Client's behalf, the services as outlined in Section B 'Service Proposition' of this Agreement.

2.2 Client agrees to provide such details required to create an approved Call Script and Rebuttal Script. For campaigns involving outbound call services, the Call List provider agrees to provide a Target Call List 'scrubbed' against the DoNotCall.gov registry.

2.2.1 Both Callbox and Client agree to the submission of Call List, Email List, Call Script and Email in full compliance with all Federal, State, City, and Local laws and regulations regarding Email Marketing and Telemarketing Sales Rules. Client shall be indemnified against any and all claims arising from infractions of such rules, laws, and regulations.

2.3 Callbox agrees to provide dedicated phone lines and any required software or hardware necessary to provide the services as described in Section B 'Service Proposition' of this Agreement.

3. FEES/CHARGES

3.1 The Client agrees to pay Callbox for its services at the rates set forth in Section C 'Quote for Services' of this Agreement.

3.2 The Client may request in writing that Callbox implement modifications to the agreed services. Callbox will be given reasonable time to comply with the Client's new requirements as well as to adjust the corresponding fees. Should more extensive training be required to meet the new program, the Client and Callbox will agree on an appropriate timeline to begin.

4. CONTRACT RENEWAL

4.1 Any revisions to the call campaign requirements must be made in writing by the Client to Callbox. The subsequent addendum to the contract must be signed and agreed upon by the parties. Corresponding adjustments to the service fees may apply.

4.2 Subsequent month must be agreed in writing.

E. Terms and Conditions

5. TERMINATION

5.1 Any termination of the contract shall not entitle Client to any refund.

5.2 All deposits and monies paid by Client shall be forfeited in favor of Callbox in case of pre-termination or cancellation by the Client for any reason before the start of or during the campaign period. Unpaid services already rendered by Callbox during the campaign shall be immediately due and demandable.

5.3 Upon the termination of this Agreement, all rights and obligations of each party under this agreement shall cease, except that legal rights arising out of a breach of any terms of this agreement will survive the termination of this agreement.

5.4 The payment obligations under Section C 'Quote for Services' will survive any termination of the agreement if, and to the extent, any fees have accrued or are otherwise due and owing from Client to Callbox as of the date of termination of this agreement.

5.5 Failure by Client to provide Callbox with information and assistance within twelve (12) months from the date of payment constitutes termination of this Agreement.

6. CONFIDENTIALITY

Callbox acknowledges that all information provided by the Client will or may be confidential, proprietary, or affected by competitive sensitivity, and will treat all of the information as confidential, disclosed to employees on a need-to-know basis only. At the Client's written request, Callbox will return all copies of any written information when it no longer needs the information, excluding billing data and documentation.

7. FORCE MAJEURE

Client expressly relieves Callbox from liability for any failure to perform, hereunder, if such failure is due to causes beyond the control of such party, such as labor difficulties, acts of God, governmental action, war, fires, floods, epidemic, or the like.

8. VENUE OF LEGAL ACTION

In case of dispute arising out of or related to this Agreement, the venue for the filing of legal actions shall be the Courts of the State of State of California. The laws of State of California shall govern the interpretation and enforcement of this agreement.

9. NON-SOLICITATION

During the term of this agreement and for an indefinite period subsequent to the termination of this agreement, Client shall not, without the prior consent of Callbox, directly, indirectly, or through any other party hire or solicit the services of any Callbox employee. For any breach, Client shall pay an agreed penalty of US\$50,000 for each employee.

10. AMENDMENTS

This Agreement may be modified in writing if signed by the parties in interest at the time of the modification.