



SALES & MARKETING SOLUTIONS

PROFESSIONAL SALES AND MARKETING SERVICES



Alex Matheson

Verbio Technologies

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Gary Sia

Sales Manager

garys@callboxinc.com

888.658.4179



Callbox Sales and Marketing Solutions

4924 Balboa Blvd., #353, Encino CA 91316 USA

www.CallboxInc.com

Alex Matheson

Verbio Technologies
2225 E Bayshore Rd, 200
Palo Alto, CA 94303

Dear **Alex**,

Thank you for giving us the opportunity to become your sales and marketing partner.

We are pleased to present this proposal for your upcoming **Lead Generation / Appointment Setting** campaign. The campaign detailed here will market your products and services to your potential customer base, and provide the vital component to your company's overall sales and marketing strategy: **contact**.

This proposal is comprised of the following sections:

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

We are confident that we have crafted a solution that is not only suitable to your goals but will exceed your expectations for such a program.

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

Cordially yours,

Gary Sia
888.658.4179

A. Company Profile

Award-winning Sales and Marketing Firm

LARGEST
in **B2B** Direct
Marketing

More than **10 years** of sales and marketing industry experience

Staff of over



800 professionals worldwide

Performing outsourced functions for
more than 10,000 sales and marketing departments



World-class B2B Direct Marketing Services

Call • Email • Social • Online

Database of more than



Decision Makers



Cloud-based Lead Management and Marketing Automation Software

B. Service Proposition

1

**We Provide You
with Your Own Team**



**Account
Manager**

To manage campaign and
provide regular consultation



**Inside Sales
Representative(s)**

To call prospects and
generate leads for you



**Email Marketing
Specialist**

To generate additional
leads via email marketing



**Research and
Data Analyst**

To research and build
your target call list



**Quality
Analyst**

To monitor call quality
and verify validity of leads

2

**We Build Your
Targeted Database**

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

Location

Industry Type

Employee Size

Revenue Size

3

**We Do Multi-Channel
Lead Generation**

Call, Email and LinkedIn
Campaigns, and Profiling.

Work Hours:

8 hours / day

5 days / week

22 business days / month

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

Call Marketing

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

**No. of
Calls** 140 calls per day or
3,000 per month

Data Verification

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

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 for you and/or your
sales executives, or invite qualified
prospects to attend or register for your
upcoming event.

Email and LinkedIn Marketing

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

**No. of
Emails** 10,000 delivers or
1,000 opens per month

Weekly Blast

To boost results of the team's
telemarketing efforts, we craft an email
marketing campaign to tap into your
prospects that are unreachable by phone.

Call & Send

Depending on the call result, we send
your prospects follow-up emails right after
the call, and on scheduled times
thereafter until they are converted to
warm, qualified leads.

Social Networking and Management

We create/update and maintain a LinkedIn
profile for your company and reach out to
target prospects to connect.

Profiling

We establish a social media footprint for
your company by building your network.

List Updating

Update the names of the target decision
makers and the respective contact
information, via desktop profiling, cross
referencing with our data warehouse
and other list sources and call
verification.

Opt in

We reach out to these target prospects
and inquire if they are good to receive
information about our services, and
annotate when the last opt in is for your
reference.

Email Verification

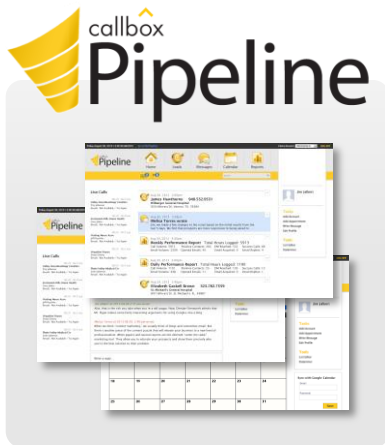
We send out generic email thanking
them for opting in, which would also
validate if the email gathered is accurate
and we have an email documenting our
call to the target prospects.

B. Service Proposition

4

We Deliver Leads thru Callbox Pipeline

Callbox Pipeline allows you to access the leads generated or appointments scheduled by your Callbox team in real time via any computer device (laptop, tablet, phone, desktop).



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

Automate Your Marketing

- Set email templates for your campaign to be used by your Callbox Rep to send additional information to your prospects right after the call.
- Conduct email drip marketing.
- We cross match your prospects with their LinkedIn profiles and invite them to connect while your Callbox Rep is on the phone with them.

5

What You Get



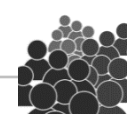
**Profiled Up-to-date
Contact Data**



**Follow-Ups
and Warm Leads**



**Market
Research Data**



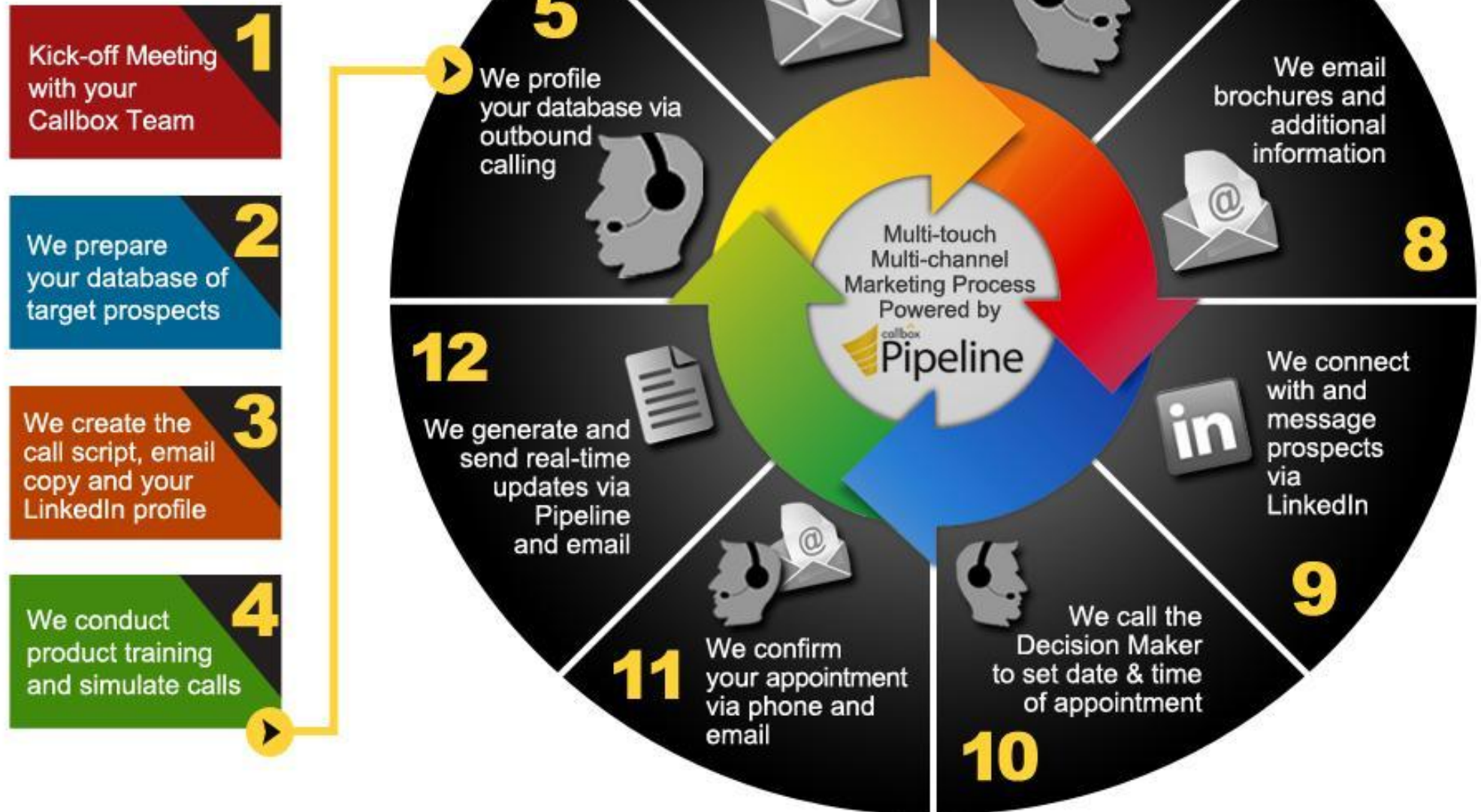
**Wider Brand
Exposure**



**Sales
Appointments**

B.3 Service Proposition

Set-up Process and Campaign Flow



C. Quote for Services

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

FEES				
	RATE	QTY	PRICE	MONTHLY FEE
Inside Sales Seat	\$ 3,300	1 Seat	\$ 3,300	\$ 3,300
Calling List	----	Included in the package	----	----
MONTHLY FEE				\$ 3,300
THREE (3) MONTHS – DISCOUNTED PACKAGE (PREPAYMENT)				\$ 9,000

Contract Period	3 Months
Start and End	Start Date: TBD End Date: TBD
Payment Details	The Monthly Fee is payable prior to the start of the initial campaign and upon contract signing. Acceptable forms of payment are credit card, ACH, and check
Validity	This proposal is valid for 30 days from the document date on page one (1).

D. Acceptance

IPVT2015011483

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

Company: _____ Date: _____

Name: _____ Title/Position: _____

Callbox Representative: **Gary Sia** Date: _____

2 Terms of Payment:

AMOUNT:

\$9,000

BANK TRANSFER INFORMATION

Pay **Wells Fargo Bank**
Account # **1662288396**
Routing # **121000248**
SWIFT Code **WFBIUS6S**
Address **17232 Ventura Blvd., Encino, CA 91316**
Additional fee of \$15 applies as bank charge.

For ACH Transfer

Bank Account Name **Callbox Inc.**
Please ask for more ACH Transfer details from your sales rep.

CREDIT CARD INFORMATION

☐ VISA ☐ MASTERCARD We do not accept AMEX or DISCOVER.

Cardholder's Name (as it appears on card): _____

Credit Card No : _____

Expiry Date:

Month _____ Year _____

3-Digit Security Code : _____

For credit card payments, a 3% surcharge applies.

CHECK INFORMATION

Bank Routing No : _____

Account No : _____

Check No : _____

Amount Issued : _____

Check Issued By : _____

Date : _____

For non-US checks, please indicate amount in U.S. Dollars.

BILLING INFORMATION

Name: _____

Street Address: _____

City: _____

State: _____ Zip/Postal Code: _____

ACKNOWLEDGEMENT

I acknowledge that I am the authorized user of the account listed above. I authorize the use of the above credit card number 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.

3 Please fax the signed agreement to **(888) 277-1217**.
For credit card payments, also include a copy of both front and back of cardholder's driver's license or any valid ID.

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. and shall remain in force and effect for the contract period specified in Section C “Quote for Services,” with the option to renew.

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 as may reasonably be 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.

2.3 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 requests ten (10) business days notice 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 This agreement is automatically renewed unless the Client signifies in writing the intention to terminate the contract or to renew it at a later time, three (3) working days before the contract end date. All duties and responsibilities stated herein shall be carried over and remain in full force and effect for the duration of the campaign.

4.2 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.

4.3 Any termination of the contract prior to its expiration shall not entitle Client to any refund.

4.4 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.

E. Terms and Conditions

5. TERMINATION

Upon the termination of this Agreement, all rights and obligations of each party under this agreement shall cease, except that:

5.1 Legal rights arising out of a breach of any terms of this agreement will survive the termination of this agreement.

5.2 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.

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. ATTORNEYS' FEES

If any Party brings an action or proceeding to enforce the terms hereof or declare rights hereunder, the Prevailing Party (as hereafter defined) shall be entitled to reasonable attorneys fees. Such fees may be awarded in the same suit or recovered in separate suit arising from or out of the same cause of action. The term "Prevailing Party" shall include, without limitation, a Party who substantially obtains or defeats the relief sought, as the case may be, whether computed in accordance with any court fee schedule, but shall be such as to fully reimburse all attorneys' fees reasonably incurred.

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.