

Customer Service Intelligence, Inc., P.O. Box 5489 Bella Vista, AR 72714, provides customer feedback follow-up services for clients. Customer Service Intelligence, Inc., doing business as CSI, is a call center operation which places calls through Vonage, places text messages through Twilio, and places email messages through VenTech Solutions.

CSI will respond to any/all traceback requests from the Commission, law enforcement, and the registered traceback consortium, and will cooperate with such entities in investigating and stopping any illegal robocalling on our network and/or server.

CSI does not implement the STIR/SHAKEN methodology. Instead, CSI has its own procedures for preventing the use of robocalling in its business. These are as follows.

1. CSI does not sell or provide phone lines to third parties. All phone calls, SMS messaging, and email messaging are performed either manually by CSI's own employees or initiated through CSI's own server. CSI has complete control over the process by which customers are contacted. This process does not include robocalling. Please see the "CSI Communications Flow Diagram" and "CSI Chat Application Flow Diagram" attached to this document, below.
2. CSI makes phone calls, sends SMS messages, and/or sends email messages, to the customers of the clients with whom CSI does business. Upon enrolling, each CSI client must fill-out a form and sign it, agreeing to get each customer's consent to being contacted by CSI on behalf of the client. The clause in the enrollment form states, "By providing CSI with your customer phone numbers, email address and contact info, you and your customers, consent to have CSI contact your customers via the means of service that you have chosen CSI to use for said contact (phone call, SMS, email, etc.) This reach out is for the sole purposes of gathering your customers feedback on their experience with the client and their products." Please see the "North American Enrollment Form" attached to this document, below.
3. CSI uses other providers of voice-over-IP communications in order to place phone calls and send SMS messages to recipients. CSI relies on the STIR/SHAKEN and other anti-spam and anti-robocall implementations of these VoIP providers, which include Vonage and Twilio.
4. CSI does not gather the customer contact information of its clients for sale to third parties, nor does it use this information for anything other than gathering customer feedback on their experience with the client and the client's products.
5. CSI maintains a database of customers who do not wish to be called, or who do not wish to receive SMS or email messages. This database is referenced each time a phone call, SMS message, or email message is prepared so that no attempt is made to contact any customer in this database. Please see the "CSI Communications Flow Diagram" and "CSI Chat Application Flow Diagram" attached to this document, below.

6. CSI does not use any voice recordings, such as are used with robocalls, when placing phone calls to customers. Instead, live employees of CSI call a client's customers directly.

7. CSI does not use "local presence" local area code phone numbers when attempting to reach a client's customers. Instead, a toll-free call-back number, 800.835.5274, registered to CSI, is presented as the caller ID, and customers may always call back directly to CSI.

8. Client customers who receive SMS messages from CSI may opt-out of receiving further SMS messages by responding STOP to an SMS message from CSI, and this is stated clearly in the SMS message itself.

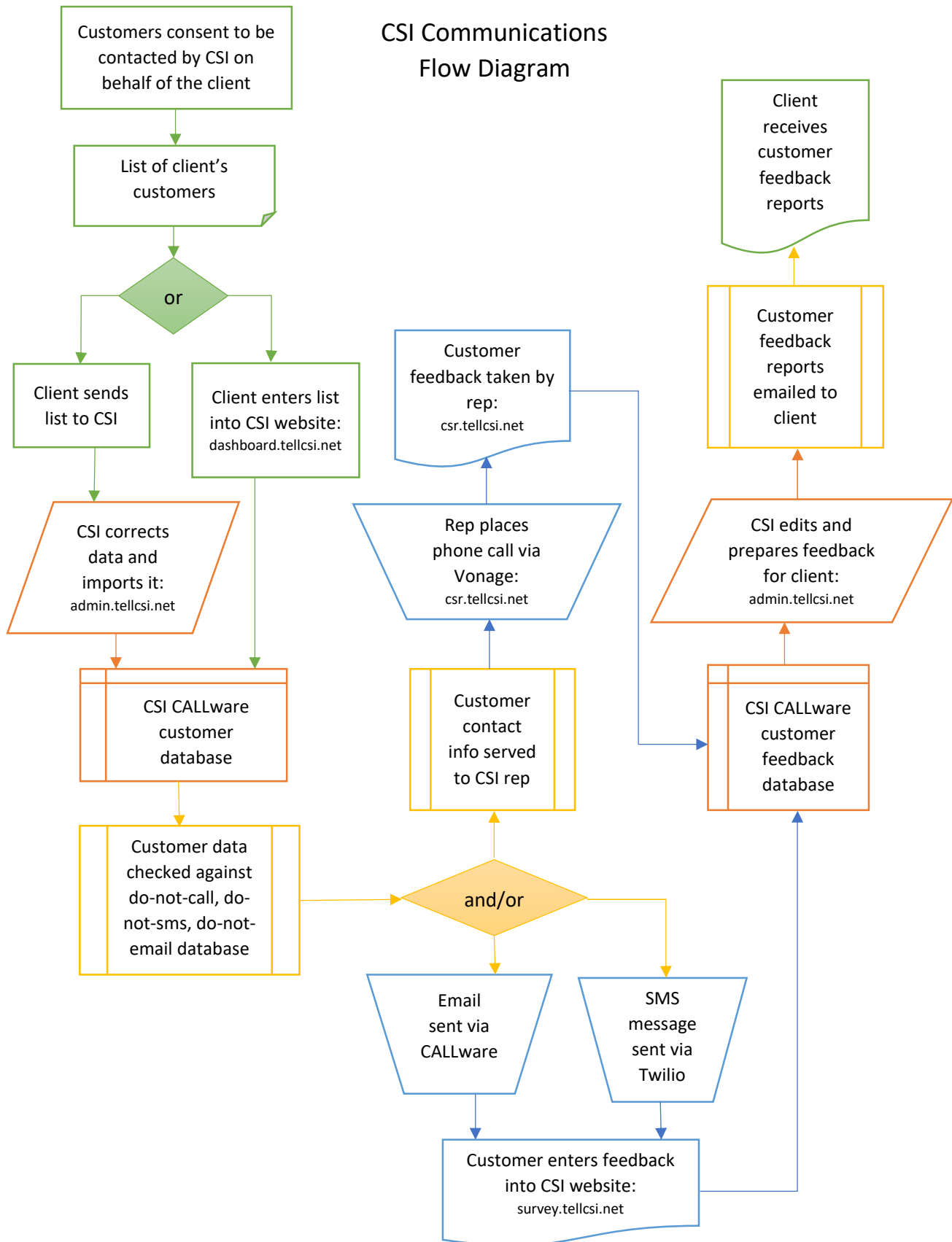
9. CSI only uses a domain name registered to itself as a business when sending email to a client's customers. Customers who receive email messages are always given an "unsubscribe" link in the body of that email.

10. Standard unsubscribe and opt-out functionality is available to all customer recipients of CSI's Chat application by which clients may communicate with their customers. The do-not-SMS database is checked each time an attempt is made by a client to contact a customer by SMS via the Chat App.

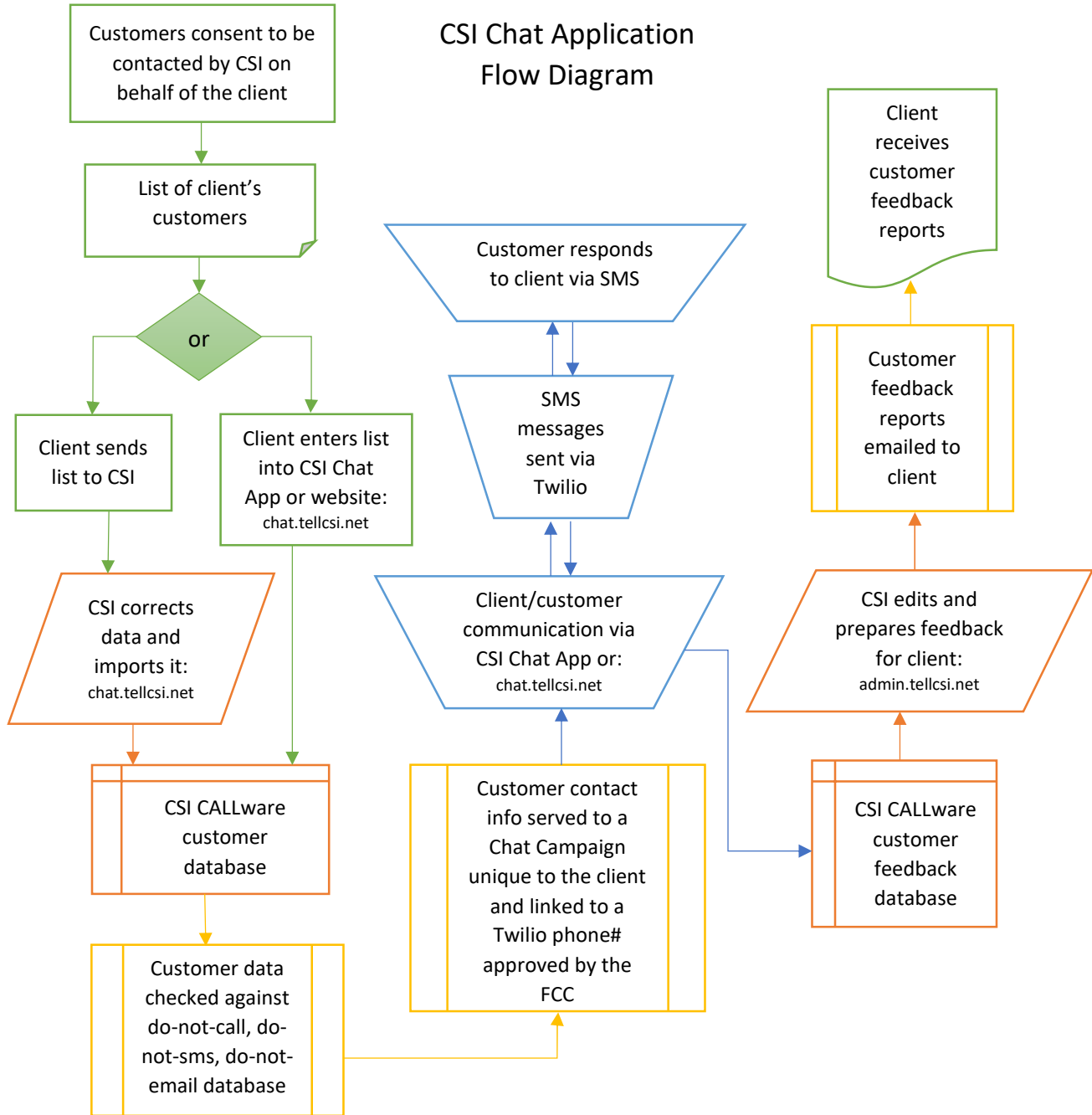
11. The CSI Chat application consists of multiple campaigns, one or more of which may be assigned to CSI clients for their own business purposes when contacting clients, such as for; service appointments, sales notifications, customer support, and any other legitimate business purposes which the CSI client has for contacting its own customers directly. Each of these "chat campaigns" maps over to a Twilio Chat Campaign with a unique phone#, and which has been approved by the FCC via A2P. A description of the "CSI Twilio Chat Campaign" is attached to this document.

Rebecca Thompson
Customer Service Intelligence, Inc.
4/1/2024

CSI Communications Flow Diagram



CSI Chat Application Flow Diagram



CSI Twilio Chat Campaign

Campaign Type: Customer Care

Campaign Description:

A chat between customers and a vendor or dealer who is a client of Customer Service Intelligence, Inc., and who has signed up and paid for the ChatApp service. This CSI vendor or dealer will communicate/chat with their customers from a computer or mobile phone via a website or phone app for purposes customer support. Customers will respond via SMS. Customers have given their contact information to the CSI vendor or dealer understanding that they may be contacted either by CSI or by their vendor or dealer. Customer Service Intelligence, Inc. assigns one unique A2P compliant Twilio Messaging Service to one CSI client (vendor or dealer) so that communications between customers and their vendor or dealer are secure. The enrollment forms, including the Chat Platform enrollment form, are signed by the client electronically via document.adobe.com. CSI then directs clients to: https://dashboard.telldcsi.net/program_entry_reg.asp to setup a new CSI program. The new program setup website includes the CSI Privacy & Data Policy. Screenshots of the registration and setup page, as well as the Privacy & Data Policy may be found here: https://dashboard.telldcsi.net/optin_examples.asp. The CSI Privacy & Data Policy may be found here: https://dashboard.telldcsi.net/privacy_policy.asp. A CSI account administrator stays in contact with the client in order to deal with any special setup situations. Opt-in information, as well as all data collected on behalf of a CSI client, is only shared with that client's authorized users. No CSI data is shared with third parties. Every client application for a new CSI program and/or use of the Chat Platform is checked by a CSI account administrator.

Sample message #1:

Hi, Jamie Johnson, your unit will be ready for pickup at 9:30AM tomorrow. Let us know if you have any questions.

Sample message #2:

Hello, congregation! Our annual fall retreat will be held this weekend. If you are interested, call the church office or respond back to me here. The fee this year is \$45.

Message will include embedded links: Yes

Message will include phone#s: Yes

How do end-users consent to received messages?:

Customers have given their contact information to their vendor or dealer understanding that they may be contacted either by CSI or by their vendor or dealer. This contact may take the form of SMS text, email, and/or direct phone calls.



North American Enrollment Form

CLIENT: The Client agrees to provide CSI with the customer list electronically, set up a user for CSI to weekly pull the lists, or enter their customer list directly into the CSI database via CSI's client portal. For any format that would require CSI to enter the names manually into our database, the fee will be \$.50 cents per customer name submitted. CSI warrants the confidentiality of such lists and they will remain the property of the Client and used for no other purpose.

SETUP FEES & SERVICES: For a ONE-TIME Lifetime Setup Fee (per program) of \$490.00 USD, CUSTOMER SERVICE INTELLIGENCE, Inc. (CSI) will provide our call center, and a custom in-house team of a CSI Professional Customer Service Representatives, along with a service in which important customer feedback is collected by direct telephone contact with Client's customers. This feedback is then transmitted to Client in various Management Reports: (listed below) for the primary purpose of helping Client achieve higher levels of customer satisfaction, repeat business, referrals and/or closing ratios within the Client's organization. CSI will charge \$12.00 per customer name submitted for up to 5 questions. Additional questions available @ \$2.00 each. CSI will make up to 6 attempts and leave two voicemails, unless otherwise noted or directed. Non-contacts will be detailed and categorized on client's Monthly Non-Contact Report.

CUSTOMER REPORT CARD	All Customer comments, complaints, urgent requests will be flagged as "HOT SHEET."
HOT SHEET STATUS REPORT	List of recent customers that were flagged as "HOT SHEET"
WOW REPORT	List of recent customers that were flagged as "WOW" comment
EMPLOYEE PERFORMANCE REPORT	Track your employee's performance with this incredible tool.
NET PROMOTER SCORE REPORT (NPS)	Pinpoint your PROMOTERS and DETRACTORS at a glance.
CSI RATING PROFILE	Tally of answers and graph of overall CSI ratings
SUGGESTION SUMMARY	Summary and graph of suggestions categorized into 12 areas for easy reference
MULTI-CHOICE SUMMARY	Compilation of any multi-choice question
CALL REPORT SUMMARY	Reason for Customers unavailability
INDUSTRY BENCHMARK REPORT	Compare your business to industry stats. (Only available in select industries.)

Also Included:

- Live Customer Service and a CSI Client Liaison
- Staff-wide access to CSI's proprietary cloud software application
- Customizable Reports
- Daily (HOT/WOW) & Weekly/Monthly Email Report Delivery
- CSI Award for 24 consecutive months of excellent customer service (98% CSI Rating or better)

Other Optional Fees:

Monthly or Quarterly CSI Action Plan - \$250.00 per 90-minute session with a CSI Customer Experience Consultant. Maximum of two sessions allowed per month per client. Multiple locations are permitted to purchase a maximum of two sessions per location.

Extra email blasts/surveys/PR Announcements - \$25.00 per month for up to 100 extra customers emailed. \$50.00 per month for up to 250 extra customers emailed. CSI is CAN-SPAM compliant. All email addresses must be opt-in members of your email list or previous customers.

Manual Customer List Retrieval - Available on a case by case basis. Pricing to be determined.

OTHER TERMS:

Renewal: The Client agrees to an initial agreement period of ninety (90) days, beginning on _____. After such time, this agreement will automatically renew every thirty (30) days. CSI asks 30 days written notice to cancel this agreement.

Billing: CSI Invoices are billed monthly, after the Management Report is generated. Terms are NET/10. If payment is not received by the 11th past due day, the client's corporate credit card will be charged for the amount due.

Past due charges: A late fee of \$25/month/program will be charged on the 31st past due day for all invoices. When a current Corporate Credit Card is not on file, these late fees will be added to your next month's invoice(s). Should account become 30 days past due; service will be paused. Service will resume after account is brought current.

Indemnification Clause: By providing CSI with your customer phone numbers, email address and contact info, you and your customers, consent to have CSI contact your customers via the means of service that you have chosen CSI to use for said contact (phone call, SMS, email, etc.) This reach out is for the sole purposes of gathering your customers feedback on their experience with the client and their products.



North American Enrollment Form

Client Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Contact Person: _____ Credit Card: _____ Exp.: _____

Association Membership: _____ Company Management Software: _____

Estimated Monthly Volume: _____

Client Agrees to the above fees and terms:

Client Signature

Print Name

Title/Role

Becky Thompson

CSI Signature

Becky Thompson

Print Name

President

Title/Role

ADDENDUMS



North American Enrollment Form

COST SUMMARY

<u>PROGRAM</u>	<u>UNIT PRICE</u>	<u>SETUP FEE</u>	<u>ADDITIONAL</u>



Chat Platform Enrollment Form

CLIENT: The Client agrees to provide CSI with the entire customer list electronically or enter their customer list directly into the CSI database via CSI's client portal. CSI warrants the confidentiality of such lists, and they will remain the property of the Client and used for no other purpose.

SETUP FEES & SERVICES: For a Setup Fee of \$590.00 per Chat App Campaign, CUSTOMER SERVICE INTELLIGENCE (CSI) will provide our CSI Chat App to dealers and other clients. CSI will perform the initial import of the clients' customer lists. The CSI Chat App is available on personal computers (both on Windows and Apple products) via a web browser, on Android phones as an installable app, and on iPhones via a web browser (a future version may include an installable app for iPhones). Some functions, such as the import of customer names, are best performed on a personal computer. The CSI Chat App will allow client employees to text customers directly, including SMS text and MMS (photos, videos, PDF's, etc.), as well as receive communications back from those customers. Each client department should have its own Chat App Campaign.

Total texts	Monthly Charge
1-999	\$40.00
1000-1999	\$80.00
2000-2999	\$120.00
3000-3999	\$160.00
4000-4999	\$200.00
5000-5999	\$240.00

REPORTS PROVIDED: The CSI Chat App will include a report which indicates the number of SMS texts and MMS messages which have been sent and received based on a monthly period for each CSI Chat App Campaign and user.

TEXT SUMMARY REPORT Available on the Chat Dashboard

OTHER TERMS:

Renewal: The Client agrees to an initial agreement period of one year, beginning on _____. After such time, this agreement will automatically renew annually. CSI requires 30 days' written notice to cancel this agreement.

Billing: Client must keep on file a valid credit card for automatic monthly charge. Monthly invoices are emailed with your payment receipt. Your card will automatically be billed on the first day of each month. Should account become 30 days past due; service will be paused. Service will resume after account is brought current.

Indemnification Clause: By providing CSI with your customer phone numbers, email address and contact info, you and your customers, consent to have CSI contact your customers via the means of service that you have chosen CSI to use for said contact (phone call, SMS, email, etc.)



Chat Platform Enrollment Form

Client Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Contact Person: _____ Credit Card: _____ Exp.: _____ Code: _____

Association Membership: _____

Company Management Software: _____

Estimated Monthly Volume: _____

Client Agrees to the above fees and terms:

Client Signature

Print Name

Title/Role

Becky Thompson

CSI Signature

Becky Thompson

Print Name

President

Title/Role



Chat Platform Enrollment Form

COST SUMMARY

<u>PROGRAM</u>	<u>SETUP FEE</u>	<u>ADDITIONAL</u>

ADDENDUMS