

Description of Koncert Products

Koncert's platform comprises multiple products/components, accessible via a browser certified by Koncert. In the case of a dialer product, the user further accesses a conference bridge via a phone connection or a computer based audio connection.

The purpose of this document is to provide a general description of Koncert's products and highlight important features. Further, after purchasing the license, from time-to-time Koncert may rollout new product releases which may have changes to the features that are part of the product release that was originally purchased by the Subscriber. When a new product release becomes available, Subscriber shall agree to upgrade the product associated with the purchased license to a new product release within a reasonable timeline (no later than 120 days from the date when the new product release became available) and any changes to the features associated with such new product release shall be acceptable to Subscriber. Capitalized terms in this document have the meaning indicated in Koncert's Terms and Conditions at <https://www.koncert.com/license/> ("Terms and Conditions") unless the capitalized term is otherwise defined in this document. This document supplements the Terms and Conditions.

Subscriber is responsible for maintaining an internet connection and phone connection that is commercially reliable and of acceptable quality. Further, Subscriber is responsible for using a browser in an environment meeting adequate CPU, memory, and other computer resources necessary or appropriate for the Subscribed Service. The version of the browser and the underlying operating system (OS) on which the browser runs on should be a version certified by Koncert. If the Subscribed Service needs to be installed on Subscriber's desktop or mobile device (if applicable), then the version of the underlying operating system should be a version certified by Koncert. If the Subscribed Service or Subscriber's use thereof is integrated with other third party systems (like Subscriber's CRM) then the version of such third party system should be a version certified by Koncert. Please see the "Systems Requirements for Koncert" document ("Systems Requirements"), available at www.koncert.com/license, for further details on the systems and network requirements. Subscriber is responsible for meeting the applicable requirements set forth in the Systems Requirements. Koncert is not responsible for, and Subscriber hereby releases and holds Koncert harmless from, any issues arising from (i) Subscriber's failure to meet the requirements set forth in this Section (including the applicable requirements set forth in the Systems Requirements), or (ii) the Subscriber installing, removing, upgrading or otherwise modifying its hardware, software or any third party applications.

Koncert product availability and/or the associated features may be limited or vary based on availability of integration with third party systems. If Subscriber purchases a product for standalone deployment (without integration with a third party system) then data may not be synchronized between the third party system and the Subscribed Service. Subscriber is responsible for validating and understanding the features of Subscribed Service before purchasing the license.

1. AI Parallel Dialer. AI Parallel Dialer is an AI assisted dialing solution that makes phone calls across multiple lines to a list of phone numbers provided by a user, recognizes voicemails and phone trees, and connect live calls to the user ("user" or "talker") waiting in a conference bridge to receive those calls. After a live call is connected the user will become busy and no further live calls will be connected. A live phone call connectivity established between a user and a live person recognized and connected by the AI Dialer is called as a "Connect" or "Live Connect". Maximum number of lines allowed for making phone calls in parallel is specified in the quote/order form or specified as part of the package definition. AI Parallel Dialer includes the following features:

My Lists

- Users can upload lists from CRM (if integrated with CRM) or CSV file. Users are allowed to choose one or more lists (up to 4) to start a dialing session.
- List priority can be set before starting a session.

- Additional metrics for the lists including # of dials, # of connects, last attempted/connected information can be displayed.
- Managers can see their team's lists and their performance.

My Session

- Users can preview the lists uploaded from My Lists tab. Users are allowed to scrub the list before starting the session.
- Users can start a dialing session and can choose from whether to reset the list and start from the beginning of the list, or from where it was left off from a previous session. Also, users can refresh the list that will bring any additional records from the third party system from where the list is coming from.
- During the dialing process, multiple contacts can be dialed in parallel, typically 4 or 5 (up to 10 depending on the subscription type). Contacts being dialed are shown in orange and once a live person is connected the associated record turns to green.
- The system performs AI based automation like detecting voicemail, skipping or leaving a pre-recorded voicemail, detecting a phone tree, skipping the phone tree, and detecting a live call answered by a human, with a reasonable accuracy.
- Upon connecting a live call, a call disposition popup comes up showing the target contact's information. User can take notes while on the call which creates a completed activity in the third party system, if configured.
- After finishing a live call, the user can resume the dialing session by clicking a button.
- There is no limit on the number of phone calls, subject to Konkert's Fair and Reasonable Use Policy (described in this document).

Remote Coach/Call Recordings

- Managers can use Remote Coach feature to listen and whisper to users logged into the dialing session.
- Managers can also setup call recording features such as enable call recording for users, enable recording for two party consent states, allow users to record and listen to their voice recordings.
- Managers can listen to the call recordings and rate the calls with comments. Users can record and listen to call recordings if the required permissions are given.

Reports and Dashboards

- Summary and Detailed Reports available for all users
- Standard Dashboards with usage charts available for all users

Settings (User)

- Users can customize view and sort column options.
- Users can configure specific settings including international calling and enable/disable caller ids.

Best practices for effective use of AI Parallel Dialer:

Due to the nature of live call connection from the AI calling system to a user, once a live person is detected and connected to the user, the user should engage the live person quickly. If the user is not attentive during an AI Dialer calling session, the user may not react quickly to engage the live person which may result in a delay ("User Reaction Delay"). User should minimize the User Reaction Delay to avoid the live person hanging up the call after the call is connected.

2. AI Flow Dialer. AI Flow Dialer is an AI assisted dialing solution that makes phone calls, single call at a time, to a list of phone numbers provided by a user. The system performs AI based automation like detecting voicemail, skipping or leaving a pre-recorded voicemail, detecting a phone tree, skipping the phone tree, and detecting a live call answered by

a human, with a reasonable accuracy. If needed, the user is allowed to take control of a call at any time by pressing a button, which will disable the AI automation for the current call. AI Flow Dialer includes the following features:

My Lists

- Users can upload lists from CRM (if integrated with CRM) or CSV file. Users are allowed to choose one or more lists (up to 4) to start a dialing session.
- List priority can be set before starting a session.
- Additional metrics for the lists including # of dials, # of connects, last attempted/connected information can be displayed.
- Managers can see their team's lists and their performance.

My Session

- Users can preview the lists uploaded from My Lists tab. Users are allowed to scrub the list before starting the session.
- Users can start a dialing session and can choose whether to reset the list and start from the beginning of the list, or from where it was left off from a previous session. Also, users can refresh the list that will bring any additional records from the third party system from where the list is coming from.
- During the dialing process, one contact can be dialed at a time.
- When call is initiated, a call disposition screen is shown and User can take notes while on the call which creates a completed activity in CRM, if configured.
- After finishing a live call, the user can resume the dialing session by clicking a button.
- There is no limit on the number of phone calls, subject to Konkert's Fair and Reasonable Use Policy (described in this document).

Remote Coach/Call Recordings

- Managers can use Remote Coach feature to listen and whisper to users logged into the dialing session.
- Managers can also setup call recording features such as enable call recording for users, enable recording for two party consent states, allow users to record and listen to their voice recordings.
- Managers can listen to the call recordings and rate the calls with comments. Users can record and listen to call recordings if the required permissions are given.

Reports and Dashboards

- Summary and Detailed Reports available for all users
- Standard Dashboards with usage charts available for all users

Settings (User)

- Users can customize view and sort column options.
- Users can configure specific settings including international calling and enable/disable caller ids.

Best practices for effective use of AI Flow Dialer:

Due to the nature of live call transfer from the AI calling system to a user, once a live person is detected and transferred to user, the user should engage the live person quickly. If the user is not attentive during an AI Dialer calling session, the user may not react quickly to engage the live person which may result in a delay ("User Reaction Delay"). User should minimize the User Reaction Delay to avoid the live person hanging up the call after the call is transferred.

3. Click Dialer®. Click Dialer is a click-to-call software feature accessible in a call list screen within Konkert AI Flow Dialer and AI Parallel Dialer, or in a prospect screen within Konkert Cadence. User can dial with just a click on a phone number (or an icon appearing next to the number) displayed on screen. After a call is placed, the user shall navigate the phone call. Click Dialer includes the following features:

Click-to-Call

- Users can dial a number from a list screen within Konkert AI Flow Dialer and AI Parallel Dialer, or in a prospect screen within Konkert Cadence.
- There is no limit on the number of phone calls, subject to Konkert's Fair and Reasonable Use Policy (described in this document).

Log a Call/Schedule Follow-up

- Upon call hang up, users can take notes (choose call outcome and enter comments) and save which creates a completed activity in CRM
- Users can also schedule a follow up call which creates an open activity within CRM

Remote Coach/Call Recordings

- Managers can use Remote Coach Feature to listen and whisper to users logged into the dialing session.
- Managers can also setup call recording features such as enable call recording for users, enable recording for two party consent states, allow users to record and listen to their voice recordings.
- Managers can listen to the call recordings and rate the calls with comments. Users can record and listen to call recordings if necessary permissions are given.

Reports and Dashboards

- Summary and Detailed Reports available for all users
- Standard Dashboards with usage charts available for all users

Settings (User)

- Users can configure specific settings related to Click Dialer including international calling, create call logs for each dial/voice message left, and enable/disable caller ids.

Settings (Administrator)

- Assign licenses to Users, setup workflow rules and field mappings.

4. Agent Assisted Dialer. Agent Assisted Dialer is an agent assisted dialing solution comprised of power dialing software and service provided by a team of human agents ("Dialing Agents") making phone calls to a list of target contacts, navigating the phone calls through gatekeepers, phone trees, and voicemails, and transferring live calls with the target contacts to a designated Subscriber representative/user ("Talker") waiting in a conference bridge to receive those calls. After a live call is transferred the Talker will become busy and no further live calls will be transferred. A live phone call connectivity established between a Talker and a target contact specified in the calling list provided or approved by Subscriber is called as a "Connect" or "Live Connect". Agent Assisted Dialer includes the following features:

My Lists

- Users can upload lists from CRM (if integrated with CRM) or CSV file. Users are allowed to choose one or more lists (up to 4) to start a dialing session.
- List priority can be set before starting a session.
- Additional metrics for the lists including # of dials, # of connects, last attempted/connected information can be displayed.
- Managers can see their team's lists and their performance.

My Session

- Users can preview the lists uploaded from My Lists tab. Users are allowed to scrub the list before starting the session.

- Users can start a dialing session and can choose from whether to start from the beginning of the list, or from where it was left off from a previous session or from a specific row number.
- During the dialing process, prospects being dialed are shown in orange and during transfer, it turns to green.
- Upon transfer of a call with a target contact, a call disposition popup comes up showing the target contact's information. Users can take notes while on the call which creates a completed activity in CRM, if configured.

Remote Coach/Call Recordings

- Managers can use Remote Coach Feature to listen and whisper to users logged into the dialing session.
- Managers can also setup call recording features such as enable call recording for users, enable recording for two party consent states, allow users to record and listen to their voice recordings.
- Managers can listen to the call recordings and rate the calls with comments. Users can record and listen to call recordings if necessary permissions are given.

Reports and Dashboards

- Summary and Detailed Reports available for all users
- Standard Dashboards with usage charts available for all users

Scheduler

- Users can schedule their dialing sessions based on the time zone. Users can change/cancel dialing sessions based on the permissions provided.
- Manager can schedule dialing sessions for their users.

Settings (User)

- Users can set up dialing instructions, customize view and sort functions.
- Users can configure specific settings including international calling, and enable/disable caller ids.

Best practices for effective use of Agent Assisted Dialer:

Due to the nature of live call transfer from a Dialing Agent to a Talker, Subscriber is responsible to make sure the Talker is paying attention during a dialing session and engages the prospect quickly after the call transfer. If the Talker is not attentive during a Agent Assisted Dialer calling session, the Talker may not react quickly to engage the prospect which may result in a delay ("Talker Reaction Delay"). Subscriber is responsible to minimize the Talker Reaction Delay to avoid the prospect hanging up the call after the transfer. If and when Subscriber experiences call transfer delay introduced by Dialing Agents or system, Subscriber shall notify Konkert support and Konkert will put commercially reasonable effort to minimize such delay.

Usage requirements for Agent Assisted Dialer subscription:

Following are the usage requirements for Agent Assisted Dialer subscription (provided as part of a package or a separately purchased Agent Assisted Dialer license).

- a) We have observed that when users schedule their dialing sessions in their calendar they tend to prioritize their calling and become successful. As part of this time management best practices, Konkert may require Subscriber users to schedule each dialing session ahead of time. However, on a case-to-case basis, the foregoing requirement may be waived based on the license type and volume of usage purchased.
- b) If there is a discrepancy between the number of Dials, Connects, Hours, or any other metrics in the report between Konkert's tracking and Subscriber's tracking, Subscriber shall notify such discrepancy associated with each month within 15 days after the month ends.

- c) If Agent Assisted Dialer subscription is based on the number of Connects, quality of the calling list affects the amount of effort needed to deliver a Connect or Live Connect, and thus the Subscriber is required to provide or approve calling list(s) of reasonable size and quality. A calling list is considered to be having reasonable quality if it yields one Live Connect for every 30 dials or less, averaged across monthly usage. If the list is not of reasonable quality, then Konkert reserves the right to convert the remainder of any unused Connects to a Agent Assisted Dialer subscription type that is based on the number of Hours or number of Dials, and Konkert and Subscriber shall work together in good faith to arrive at the volume of Hours or Dials associated with the new subscription type based on the then current pricing.
- d) If Agent Assisted Dialer subscription is based on SALES FULL-THROTTLE package, the following conditions (in subsections (i), (ii) and (iii)) shall apply:
 - i. Agent Assisted Dialer services provided as part of SALES FULL-THROTTLE package shall be used only by a user to whom such license is assigned and cannot be shared among users.
 - ii. Agent Assisted Dialer services provided as part of SALES FULL-THROTTLE package shall be used only for normal business use. If the average number of dials made exceeds 10,000 dials per user per month (averaged across all users of a Subscriber) then such usage may be considered as outside of normal business use, and Konkert reserves the right to review Subscriber's usage and take further action. Such further action shall include, but not limited to, charging for abnormal excess usage, converting the remainder of any unused portion of subscription to another Agent Assisted Dialer subscription type that is based on the number of Dials or Hours or Connects (and parties shall work together in good faith to arrive at the new subscription based on the then current pricing) or suspension or termination of service.

5. Konkert Cadence. Cadence is a sales cadence software that allows users to orchestrate sequence of communication steps to engage prospects via multiple channels. Cadence includes the following features:

- Define sequence of multi-channel communication steps via email, call, and other touches
- Organize prospecting efforts by seamlessly queuing up calls and personalized emails
- Track every prospect engagement between emails and phone calls
- Define email templates and share among team members
- Click Dialer for Cadence to make and log phone calls
- Tight integration with Flow Dialer and Agent Assisted Dialer to make phone calls at scale, and keep up with email volume
- Data syncing with CRM (if applicable)

6. Fully Managed Caller IDs (formerly known as Konkert Caller ID Advantage). This subscription is a combination of features offered by Konkert platform and managed services to:

1. Purchase caller ids for a Subscriber using Konkert platform.
2. Register with telecom providers and/or their analytics vendors about Subscriber's ownership of the caller ids purchased in Konkert platform and caller ids brought into Konkert platform by Subscriber. Subscriber is required to provide the necessary information and assistance to Konkert, in a timely manner, for the purposes of accomplishing the foregoing registration. If the necessary information is not provided by Subscriber that results in a successful registration, then the caller ids may be flagged as spam likely, scam likely, etc.
3. Centralized console to view, assign, and manage caller ids for users and build dynamic local caller id mapping based on area codes.

4. Automatically select and provision local caller ids based on the target prospect's area code, during the calling process.
5. Caller ID Heatmap to track dialing volumes across different caller ids to proactively maintain their reputation, which enables maintaining the caller ids reputation month-over-month.
6. Periodically scan each caller id using a mobile phone device cloud to validate reputation (spam likely, scam likely, etc) and remediate flagged numbers on behalf of the Subscriber.
7. As part of the Fully Managed Caller IDs service, Konkert may reserve up to twenty percent (20%) of the caller IDs purchased by Subscriber for inclusion in a managed replacement pool. The managed replacement pool is maintained to facilitate the replacement of caller IDs that become flagged as spam likely, scam likely, blocked, or otherwise experience reputation degradation. Konkert may, in its discretion, replace affected caller IDs with available caller IDs from the managed replacement pool to help minimize service disruption and maintain calling performance. Konkert will put commercially reasonable effort to prioritize Subscribers whose caller IDs got flagged more than 20% (of their caller IDs in their Konkert Org). The frequency and volume of such replacements is at the sole discretion of Konkert. If a Subscriber's caller IDs in their Konkert Org get flagged in much higher frequency and/or volume, then Konkert may advise the Subscriber to purchase more caller IDs to maintain their calling performance.

7. Waterfall Data Enrichment.

Easily flag bad or invalid phone numbers, cascade through multiple premium data vendors for fresh phone number replacements, start calling with the new numbers right away, and sync updates straight to your CRM that is integrated with Konkert. Replacement phone numbers already marked bad are skipped, so your database stays clean, callable, and always up to date.

8. AI PitchLab.

AI PitchLab is a dedicated module within the Konkert application that enables sales representatives to engage in simulated sales calls with conversational AI agents, known as "AI Personas." These personas act as prospective clients, providing a realistic and repeatable environment for reps to practice their sales pitches, handle objections, and improve their overall communication effectiveness.

The feature is accessible via a dedicated "AI PitchLab" tab in the Konkert interface and is composed of two primary areas: the main dashboard for interacting with AI Personas, and the PitchLab Analytics section for reviewing past call history.

Core Functionality

- **Practice Environment:** From the PitchLab dashboard, a sales rep can view a list of available AI Personas and instantly initiate a practice call with any of them.
- **AI Personas:** These are conversational AI agents designed with specific personalities, job titles, and business challenges to provide varied and realistic practice experiences.
 - **Persona Management:** Administrators can create, edit, clone, or delete custom AI Personas to tailor the training experience to their specific industry and sales scenarios.
 - **Default Personas:** Each new client organization is populated with a set of pre-built, system-defined AI Personas. These can be cloned or deleted but not directly modified.
- **Conversation Review:** All practice calls are recorded, transcribed, and summarized. This information can be reviewed later in the "PitchLab Analytics" tab.

9. **Koncert Phone**

Koncert Phone is a cloud-based business communications solution that enables users to make outbound calls and receive inbound calls through the Koncert platform. Koncert Phone is designed for teams requiring integrated telephony capabilities.

Koncert Phone may include the following features:

- Dedicated business phone numbers
- Inbound and outbound voice calling
- Fully managed caller ID health
- Voicemail
- Call history and activity tracking
- Call recording, transcription, AI based conversation analysis
- Integration with Koncert dialing platform and workflows
- Synchronization of call activity with supported CRM and sales engagement platforms
- Unified user administration within the Koncert platform
- Usage reporting and call analytics

10. **AI Voice Agent**

The Koncert AI Voice Agent (the "Voice Agent") is an automated, AI-powered conversational voice feature within the Koncert Digital Workers suite. When enabled and configured by the Subscriber, it answers inbound telephone calls on behalf of the Subscriber and holds a spoken, natural-language conversation with the caller using artificial intelligence and human-like synthetic voice. Calls are carried and processed using third-party telephony and AI voice services.

Within the persona, instructions, knowledge, and tools that the Subscriber configures for a given agent, the Voice Agent may:

- answer inbound calls and converse with the caller in a synthetic voice;
- respond to questions using reference material the Subscriber supplies;
- check availability on, and book, reschedule, or cancel meetings in, a connected user's calendar;
- send follow-up email from a connected user's mailbox; and
- capture a recording, transcript, and summary of each call for the Subscriber's review

The Voice Agent:

- handles inbound calls only;
- performs only the tasks it has been configured to perform, and acts solely through the mailbox and calendar the Subscriber connects to it;
- is an automated system whose responses and actions are generated using an LLM and may be inaccurate; and
- supplements, and does not replace, human staff — the Subscriber's personnel can review its activity and handle follow-ups themselves.

The Subscriber can configure whether certain actions (such as sending email) occur automatically or require human review before they take effect. Results depend on the Subscriber's configuration and on the connected mailboxes and calendar availability of the Subscriber's personnel.

AI/ML Models and Training Data:

Traditional Machine Learning (ML) models:

Koncert uses ML models that are not considered as generative AI models in the following scenarios.

- a) If a client subscribes to Koncert's AI dialer functionality, to detect whether a phone is answered by a live human or voicemail or phone tree, Koncert uses a pre-trained ML model licensed from a third party and models trained using Koncert's own data.
- b) If a client subscribes to Koncert's transcription/conversation intelligence functionality, to transcribe phone calls into transcripts Koncert uses a third party vendor's API service. Koncert has entered into an agreement and configured the systems to not to retain or use the audio to train the third party vendor's AI model. The transcription/conversation intelligence feature is optional and can be turned off, if needed.

Generative AI model:

Koncert uses generative AI capability in the following scenario.

If a client subscribes to AI summary notes functionality, then Koncert uses OpenAI's API service to generate AI summary of the call. Koncert has opted-out of providing Koncert's or Koncert clients' data for OpenAI's training. Therefore, Koncert does not use any data to train the generative AI system and utilizes OpenAI's pre-trained model to generate the AI Summary. The AI summary feature is optional and can be turned off, if needed.

Fair and Reasonable Use Policy:

Subscriber's use of Subscribed Service is subject to the terms and conditions of this fair and reasonable use policy ("FRUP") as described in this section below.

- Subscriber is prohibited from using the Services in any manner that results in violation of any country-specific requirements and restrictions for voice services.
- Subscriber is prohibited from using the Services in any manner that results in charges to Koncert by third parties, such as collect calls, calls made to 900-XXX-XXXX or NPA-976-XXX numbers, or any other number or service where the calling party is billed for the call by the calling party's provider on behalf of the terminating provider or its customer; or otherwise calling or sending messages to premium number ranges without Koncert's prior written consent in each instance.
- *Fair and Reasonable Use.* Unauthorized or excessive use beyond that normally experienced by other Koncert Subscribers may cause extreme network capacity and congestion issues and interfere with Koncert's network and the third party networks with which Koncert connects for calling services. Koncert's subscription and features are for normal, reasonable business use and consistent with the types and levels of usage by typical Subscribers on the same subscription plan. "Typical" refers to the calling patterns of at least 95% of Koncert's Subscribers on the same subscription plan. Certain subscription and calling plans like unlimited calling are designed for normal business use for B2B calling by a typical Subscriber and are not intended to represent usage by unique organizations.
- *Outside of Normal Use.* The following is a non-exhaustive list of uses under Koncert's calling plans that are considered outside of normal use and are not permitted, except to the extent that Koncert has expressly entered into an agreement with the Subscriber permitting the same:
 - resale to others;

- without live dialog, including use as a monitor or for transcription purposes;
 - iterative dialing;
 - spamming or blasting (e.g., sending one hundred (100) or more bulk and/or junk voicemail or faxes simultaneously);
 - usage by appointment setting firms, lead generation firms, telemarketing firms, call centers or B2C calling firms not pre-approved by Konkert in writing, further subject to compliance with applicable laws;
- Konkert has the right to prohibit a Subscriber from sending a substantial amount of voice traffic, as reasonably determined by Konkert, only to specific regions or number ranges within a country in a manner that would cause Konkert to incur material costs beyond those incurred by Konkert when sending similar quantities of voice traffic reasonably spread across all regions and number ranges within such country.
 - If Konkert determines that a User has violated this FRUP, Konkert may take necessary action by contacting the User and the associated Subscriber. Konkert will afford the Subscriber the opportunity to correct abnormal usage patterns, but if Subscriber fails to immediately conform to normal use after Konkert's notice, Konkert reserves the right to transfer Subscriber's service to a more appropriate calling plan with applicable rates for that plan, implement other limitations, or suspend or terminate the relevant Subscribed Service pursuant to this FRUP and the applicable agreement.
 - *Removing or Blocking Communications.* Konkert may remove or block communications including calls to certain countries determined solely by Konkert if Konkert suspects a violation of this FRUP, or if Konkert deems it necessary in order to protect the Subscribed Service, Konkert's network, employees, Users or third parties from harm, fraud, and/or if required by applicable law. Konkert may take such action without advance notice if required to protect Konkert and other Users in Konkert's sole discretion.
 - *Fair Usage – Group B Countries:* The Group B international calling subscription (refer order form for pricing) is subject to a fair usage limit of up to 500 minutes/user/month (pooled across the Subscriber's Konkert Org) of calling to Group B countries. Konkert reserves the right to monitor usage, and any calls exceeding this limit may be subject to additional charges at applicable rates or may require migration of Group B International calling subscription to an alternative pricing plan, including a Pay-As-You-Go model.