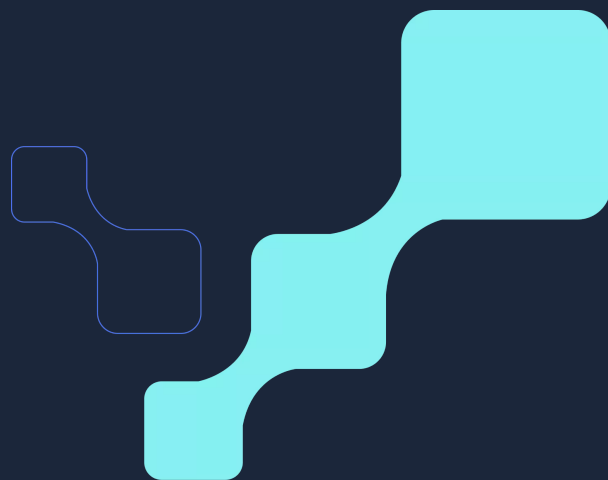




Vitaly

Vitaly Pricing Proposal for: Lending Wise

**Prepared By:**

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Prepared For:

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VITALLY ORDER FORM FOR LENDING WISE

THIS ORDER FORM EXPIRES AS INVALID IF NOT FULLY EXECUTED BY 11:59 PM (EST) ON

TERM DETAILS AND SERVICES OVERVIEW

TERM LENGTH		BILLING TERMS	
12 Months		Net 14 Days	
BILLING CONTACT NAME	BILLING EMAIL	BILLING PHONE	BILLING ADDRESS

NAME	PRICE	QTY	DISCOUNT	SUBTOTAL
Startup Plan (Annual) Includes: <ul style="list-style-type: none"> • 70% 1st Year Discount; 35% 2nd Year • 1 Full Featured Seat • 20 View Only Seats • 2,500 Tracked Accounts • 50 Playbooks • 10 Success Metrics • 1 custom object for either opportunities or another object • 15MM events per year including one year of historical data Onboarding & Support: <ul style="list-style-type: none"> • Two 30-minute onboarding sessions • Access to Customer Success Manager via email/chat 	\$12,000.00	1	70.00%	\$3,600.00
Additional Full Seat Additional seat with full access to Vitaly.	\$960.00	1	0.00%	\$960.00
Additional Viewer Seat Additional view-only seat in Vitaly.	\$240.00	0	0.00%	\$0.00
Additional 1,000 Accounts Additional 1,000 seats for seats over plan allotted amount.	\$960.00	0	0.00%	\$0.00

Year 1 Startup Discount **-\$8,400.00**

Total \$4,560.00

OVERVIEW OF CONTRACT AGREEMENTS AND OVERAGE FEES

Overage Rates:

- During the course of the Term, if Customer wishes to increase the following Services and Volume Limits, Customer may purchase additional at the following rates and fees:
 - Full Featured Seats*: USD \$80 per month per 1 seat, in increments of 1 seat, billed annually, prorated to the remainder of the Term.
 - Viewer Seats*: USD \$20 per month per 1 seat, in increments of 1 seat, billed annually, prorated to the remainder of the Term.
 - Tracked Accounts*: USD \$80 per month per 1,000 accounts, in increments of 1,000 accounts, billed annually, prorated to the remainder of the Term.

Payment and Fees

- The payment of \$4,560.00 is due in full 14 days after the Term Start Date.
- Customer shall reimburse Vitaly for any sales or use taxes that Vitaly is required to collect in connection with the provision of the Services herein to Customer.

Renewal:

- The Startup Program ("**Program**") discount shall only apply for the first 2 Terms. The discount for the first Term is 70% off the cost of Platform Access only, and the discount for the second Term is 35% off the cost of Platform Access only. In the event of a 3rd Term, and past the 2 year anniversary of the first Term Start Date, there shall be no further Program discount.
- Upon the Term End Date, and unless either Customer or Vitaly elect in writing not to renew this Order for a subsequent Term, this Order and all its terms shall renew automatically at the Volumes and rates herein except for as provided by the terms of the Program listed above, plus any applicable additional overages and taxes at the time of renewal, for a subsequent 12 month Term beginning on the anniversary of the Term Start Date.

Notes:

- Customer agrees to allow for its name, brand, and logo to be used or displayed on Vitaly's website, marketing collateral, and other Vitaly content, for promotional or sales purposes.
- Vitaly Performance Platform Access is inclusive of up to 50 Playbooks and 10 Success Metrics. Upon request, Customer may purchase additional Playbooks or Success Metrics at a rate of \$50 per month, billed annually, per 10 Playbooks or 10 Success Metrics, prorated to the end of the Term.

AGREEMENT AND SIGNATURES

This Order Form is made as of the later of May 12, 2022 or the date of the final signature below (the "**Effective Date**") by and between Vitaly, Inc. "**Vitaly**", "**we**", "**our**", or "**us**"), and the entity listed in this Order ("Customer" or "you"). This Order includes and incorporates the Vitaly SaaS Agreement ("Agreement"), accessible at vitaly.io/legal/saas-terms. In the event of any conflict between this Order and the Agreement, this Order shall prevail.

BY EXECUTION BELOW, THE SIGNATORIES REPRESENT AND WARRANT THAT THEY HAVE READ, UNDERSTOOD, AND HAVE THE AUTHORITY TO ENTER INTO THIS ORDER ON BEHALF OF THEIR RESPECTIVE PARTY.

VITALY, INC.

LENDING WISE

By:

By:

Name: Jason Richman

Name:

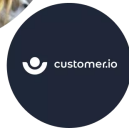
Title: VP of Sales

Title:

Date:

Date:

Customer.io: From No Dedicated CS Tool to Seeing a Massive ROI with Vitaly



Natalie Onions

VP of Customers at
Customer.io

[Learn More](#)

Challenges:

- No single source of truth for what was going on with all customers
- Team wasted time moving from app to app and updating multiple sources
- Struggled to make do with multiple tools that were not made for Customer Success

Solutions:

Customer.io's Customer Success team uses Vitaly for everything, from storing all of their call notes to leveraging Vitaly's automated Playbook feature to set tasks for themselves and ensure the delivery of a consistent experience for every customer.

- Centralized hub to plug in customer data from multiple applications
- Direct impact on overall team happiness
- Use various Vitaly features to collaborate across departments and deliver a consistent customer experience

Productboard: Reduces Gross Churn by 50% in 1 Year with Vitaly

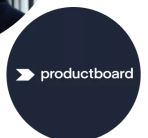
Challenges:

- No way to monitor the health of their customer base
- Uncertainty around whether or not they were focusing on the most impactful actions for their business—and book of business
- Struggled to provide visibility into their customer base to the rest of the organization

Solutions:

Productboard was able to get up and running in no time with Vitaly for a couple of key reasons; 1) Because of Vitaly's flexible, plug-and-play integrations, they didn't need a data team or operations experts to handle the integrations; 2) Due to the intuitiveness of Vitaly's platform, existing team members are able to self-adopt and new hires are able to ramp up quickly.

- Industry-leading time-to-value allowed the Customer Success team to get up and running quickly
- Leveraged Segment and SFDC bi-directional integrations to power visibility internally and cross-departmentally
- Intuitive platform helps the Customer Success team do their jobs effectively, without too much overhead



John Henwood

Senior Director of Customer
Success at Productboard

[Learn More](#)