NextGen Sales Software Privacy Policy

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This Privacy Policy explains how **NextGen Sales Software LLC** (**"NextGen," "we," "us"** or **"our"**) collects, uses, shares, and protects personal information, and the choices you have about it.

1. Scope

This Privacy Policy applies to personal information we handle about:

- visitors to our websites, including nextgensalessoftware.io;
- people who sign up for, are invited to, or use the NextGen Sales Software platform (the **"Service"**), including our customers' administrators, producers, and agents; and
- people who contact us, book a meeting with us, or otherwise communicate with us.

Consumer Data we process for our customers. Our customers, mainly insurance agencies and independent agents, use the Service to call, record, and manage information about their own leads, prospects, callers, and policyholders (**"Consumer Data"**). We process Consumer Data on our customers' behalf and at their direction, as their service provider. Each customer's own privacy notice governs its Consumer Data, and Section 7 explains how we handle it.

Our Terms of Service, available at nextgensalessoftware.io/terms, govern use of the Service. Capitalized terms not defined here have the meanings given in the Terms of Service.

2. Information We Collect

2.1 Information you give us.

- **Account and profile information:** name, email address, telephone number, agency or company name, role, password (which we store only in hashed form), licensed states and other licensing details, and preferences.
- **Billing information:** billing name, address, and payment details. Card payments are processed by our payment processor, Stripe. We receive only limited information, such as the card brand, last four digits, and expiration date, and we do not store full card numbers.

- **Content you create:** scripts, notes, dispositions, lead lists, uploads, support requests, and other content you enter into the Service.
- **Communications:** messages you send through our contact form, emails, support conversations, meeting bookings, and feedback.

2.2 Information collected when you use the Service.

- **Calls and activity:** call details such as telephone numbers, dates, times, durations, routing, outcomes, and dispositions; your availability and status; and, where a customer enables them, call recordings, transcripts, and AI-generated summaries and detections. Recordings and transcripts capture the voices and words of everyone on the call.
- **Device and technical information:** IP address, browser and operating system, device identifiers, microphone and audio device information, network quality and call-quality measurements, and diagnostic logs.
- **Usage information:** pages and features used, actions taken, settings, timestamps, and error reports.

2.3 Cookies and similar technologies. The Service uses cookies and similar technologies that are necessary to keep you signed in, secure your session, and remember your preferences. Our marketing website embeds a scheduling widget provided by Calendly, which may set its own cookies when you use it. We do not use third-party advertising cookies in the Service. You can control cookies through your browser settings, but blocking necessary cookies will prevent the Service from working.

2.4 Information from others. We receive information from the customer that invites you to the Service (such as your name, email, role, and assignments), from our payment processor about the status of payments, from telephone carriers and call analytics providers about call delivery and number reputation, and from service providers that help us operate the Service.

3. How We Use Information

We use personal information to:

- provide, operate, maintain, and support the Service, including routing, placing, and recording calls and delivering AI Features;
- create and manage accounts, authenticate users, and enforce access controls;
- process payments, credits, and billing, and prevent payment fraud;
- register and manage phone numbers and caller ID with carriers, registries, and call-authentication frameworks;

- monitor, secure, and troubleshoot the Service, and detect, prevent, and respond to fraud, abuse, security incidents, and violations of our Terms of Service;
- communicate with you about the Service, including service, security, billing, and policy notices;
- respond to your requests and provide customer support;
- send marketing communications about our products, where permitted, which you can opt out of at any time;
- analyze, improve, and develop the Service, including through aggregated or de-identified information; and
- comply with legal obligations, respond to lawful requests, and establish, exercise, or defend legal claims.

4. Artificial Intelligence

Some features of the Service use artificial intelligence, including transcription, call summaries, lead information extraction, sale detection, script assistance, and AI voice agents. To provide these features, we send the relevant call audio, transcripts, or other content to the third-party model providers that power them, such as Google and Retell AI. We do not use identifiable call recordings, identifiable lead information, or other identifiable personal information to train generalized artificial intelligence models without the customer's written authorization. We may use aggregated or de-identified information that cannot reasonably identify any individual or customer to improve our models and the Service.

5. How We Share Information

We share personal information only as described below:

- **Service providers.** We share information with vendors that process it on our behalf to operate the Service, under contractual obligations to protect it. They include providers of cloud hosting and infrastructure (DigitalOcean), telephone and calling services (Telnyx), payment processing (Stripe), email delivery (Resend), artificial intelligence and transcription (such as Google and Retell AI), and scheduling (Calendly).
- **Your agency or organization.** If you use the Service under a customer's account, that customer and its administrators can access information about your use of the Service, including your calls, recordings, transcripts, notes, status, performance, and activity.
- **Carriers, registries, and call analytics providers.** We share phone numbers, business names, and call information with telecommunications carriers and industry

registries as needed to place and deliver calls, display caller ID and names, authenticate calls, and manage number reputation.

- **Legal, safety, and compliance.** We may disclose information when we believe in good faith it is necessary to comply with law, regulation, legal process, or a governmental request; to respond to carrier or regulatory inquiries; to enforce our Terms of Service; or to protect the rights, property, or safety of NextGen, our customers, or others.
- **Business transfers.** We may share or transfer information in connection with a merger, acquisition, financing, reorganization, or sale of all or part of our business, subject to this Privacy Policy.
- **With your consent.** We may share information for other purposes with your consent or at your direction.

We do not sell personal information, and we do not share personal information for cross-context behavioral advertising.

6. Data Retention

We keep personal information for as long as needed for the purposes described in this Privacy Policy, including to provide the Service, comply with legal, tax, accounting, and regulatory obligations, resolve disputes, and enforce our agreements. Call recordings and transcripts are kept according to the customer's retention settings in the Service. Records of acceptance of our Terms of Service are kept for as long as they may be needed as evidence of that agreement. When information is no longer needed, we delete or de-identify it, and deleted information ages out of our backups in the ordinary course.

7. Consumer Data and People Our Customers Call

If you were called by, called, or are a customer or prospect of an agency or agent that uses the Service, that agency or agent decides how your information is collected and used, and you should contact it directly with questions or requests about your information, including requests to stop receiving calls. We process that information only to provide the Service to our customer and as our agreements with it permit, and we do not sell it. If you contact us with a request about Consumer Data, we will refer your request to the relevant customer where we can identify it, and we may add your number to that customer's do-not-call list in the Service when you ask not to be called.

8. Security

We use reasonable administrative, technical, and physical safeguards designed to protect personal information, including encryption of data in transit, access controls, hashed passwords, and logging and monitoring. No method of transmission or storage is completely secure, and we cannot guarantee absolute security. You are responsible for keeping your credentials confidential and for notifying us promptly of any unauthorized use of your account.

9. Your Choices and Rights

9.1 Account information. You can review and update much of your account information in the Service. If you use the Service under a customer's account, some changes must be made by that customer's administrator.

9.2 Marketing. You can opt out of marketing emails at any time by using the unsubscribe link in the email or by contacting us. We will still send service, security, and billing messages.

9.3 Requests about your information. Depending on where you live, you may have the right to request access to, correction of, deletion of, or a copy of the personal information we hold about you, to opt out of the sale of personal information or targeted advertising (which we do not do), and to appeal our decision on your request. Residents of states with comprehensive privacy laws, such as California, Colorado, Connecticut, Texas, Virginia, and others, may have these rights to the extent those laws apply to us. To make a request, email support@nextgensalessoftware.io with "Privacy Request" in the subject line. We will verify your identity before responding, and you may use an authorized agent where the law allows. We will not discriminate against you for exercising your rights.

9.4 Do Not Track. Our websites do not respond to browser "Do Not Track" signals.

10. Children

The Service and our websites are intended for business use by adults and are not directed to children under 18. We do not knowingly collect personal information from children. If you believe a child has provided us personal information, contact us and we will delete it.

11. Location of Processing

We are based in the United States, and we store and process personal information in the United States. The Service is offered for use in the United States.

12. Changes to This Privacy Policy

We may update this Privacy Policy from time to time. The "Last updated" date shows when it last changed. If a change is material, we will notify you by email or in the Service before it takes effect, and where required we will ask you to acknowledge the updated Privacy Policy.

13. Contact Us

Questions or requests about this Privacy Policy can be sent to NextGen Sales Software LLC:

- Email: support@nextgensalessoftware.io (subject line "Privacy")
- Web: nextgensalessoftware.io