



BUSINESS PROCESS OUTSOURCING

# SERVICES PROPOSAL

Scalable. Compliant. Results-Driven.

## PREPARED BY

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## PREPARED FOR

Company: **[Client Company Name]**  
Contact: **[Authorised Representative]**  
Email: **[Client Email]**  
Date: **2025**



# BPO SERVICES PROPOSAL

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## 01 EXECUTIVE OVERVIEW

EconX Group (PTY) LTD is a Cape Town-based Business Process Outsourcing (BPO) provider delivering professional inbound support, outbound calling, soft collections, lead generation, and administrative services to clients across multiple industries and geographies. We operate as a seamlessly integrated extension of your team — entirely white-labelled under your brand identity.

What sets EconX Group apart is our proprietary technology infrastructure. Every campaign we run is backed by three in-house platforms: **VIGIL** (real-time call floor surveillance and QA monitoring), **QualiCore** (automated QA scoring, coaching, and audit-ready documentation), and **ClockX** (GPS-verified attendance, shift management, and payroll reporting). This stack means you get full operational transparency, uncheatable timekeeping, and documented quality assurance on every agent, every day — without building or managing any of it yourself.

This proposal outlines our full service offering, flexible engagement and pricing models, and the operational framework under which we deliver consistent, measurable results for our clients. Whether you require a single dedicated agent or a full multi-seat team, EconX Group scales to meet your operational needs.

## 02 ABOUT ECONX GROUP

Founded and operated from Cape Town, South Africa, EconX Group leverages the country's strong English-speaking talent pool, competitive cost base, and GMT+2 time zone — ideally positioned for UK, EU, and African market campaigns. Our agents are professionally trained, quality-assured, and managed by experienced operations supervisors dedicated to campaign performance.

Unlike conventional BPO providers, EconX Group operates its own proprietary technology stack built specifically for managed call floor operations:



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|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>VIGIL</b> — Call Floor Intelligence</p> <p>Real-time screen recording and call floor surveillance. Supervisors monitor every agent live, flag suspicious activity instantly, and access full playback for QA reviews and dispute resolution. The floor is always watched.</p> | <p><b>QUALICORE</b> — QA &amp; Coaching</p> <p>Platform No-code scorecard builder, automated coaching plans triggered on failure, AI-assisted evaluation drafts, auto-escalation algorithms, and branded PDF audit trails. Multi-tenant by design — each client's data is completely isolated. (qualicore.co.za)</p> | <p><b>CLOCKX</b> — Workforce &amp; Payroll OS</p> <p>GPS-geofenced clock-in/out, leave and shift management, PAYE / UIF / SDL payroll processing, and POPIA-compliant payslip and Excel exports. Tamper-proof attendance data — no manual timesheets, no disputes. (clockx-econxgroup.com)</p> |
| <p>■ <b>GLOBAL REACH</b> Servicing clients in the UK, Europe, and Africa from our Cape Town base with timezone-aligned operations.</p>                                                                                                                                              | <p>■ <b>FULLY COMPLIANT</b> POPIA (South Africa) and GDPR (UK/EU) aligned operations. Data processing agreements available on request.</p>                                                                                                                                                                           | <p>■ <b>TRANSPARENT</b> Daily activity summaries and weekly performance reports delivered to your team. QualiCore dashboards and VIGIL recordings available on request. No black boxes — ever.</p>                                                                                             |

## 03 SCOPE OF SERVICES

EconX Group delivers the following services across any industry vertical. Campaign scope is defined per engagement and confirmed in writing prior to go-live. All services are delivered white-labelled under the Client's brand identity. Every campaign is monitored in real time via VIGIL, quality-scored via QualiCore, and agent attendance verified via ClockX — giving you full visibility at every level.

|                                          |                                                                                                                                                                                                                                                                       |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>■ <b>Outbound Calling</b></p>         | <p>Soft collections, lead generation, appointment setting, surveys, win-back campaigns, and follow-up calls. Agents follow client-approved scripts with full QA monitoring via QualiCore scorecards and live VIGIL floor supervision.</p>                             |
| <p>■ <b>Inbound Customer Support</b></p> | <p>Handling of inbound calls, emails, and live chat on behalf of the Client. Includes query resolution, account support, complaints handling, and escalation management. All interactions subject to QualiCore QA scoring and VIGIL recording for audit purposes.</p> |



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| ■ Collections Support                   | Early-stage arrears calling, promise-to-pay conversations, repayment plan negotiations, and soft debt recovery — conducted in a compliant, empathetic manner aligned with regulatory requirements. QualiCore fatal-fail rules enforce compliance criteria on every evaluated call.                       |
| ■ Lead Generation & Appointment Setting | Prospecting, qualification, and appointment booking for B2B and B2C sales pipelines. Qualified leads passed directly to the Client's sales team via agreed CRM or handoff process. Performance tracked and reported via QualiCore outcome logs.                                                          |
| ■ Administrative & Back-Office Support  | Data entry, order processing, document management, reporting, CRM updates, and other back-office tasks as defined per campaign. Agent hours verified daily via ClockX GPS attendance — no manual timesheets.                                                                                             |
| ■ White-Label BPO Delivery              | All agents operate entirely under the Client's brand. Calls are answered and made in the Client's name. Customers are not informed of EconX Group's involvement unless expressly agreed otherwise. VIGIL, QualiCore, and ClockX operate invisibly in the background — your brand stays front and centre. |

## 04 INDUSTRIES WE SERVE

EconX Group provides BPO services across all major industry sectors. Our teams are briefed and trained on industry-specific terminology, compliance requirements, and customer service standards prior to campaign launch — with QualiCore scorecards built to match each client's specific criteria and regulatory environment.

| INDUSTRY           | TYPICAL USE CASES                                                  | RECOMMENDED SERVICE    |
|--------------------|--------------------------------------------------------------------|------------------------|
| Financial Services | Debt collections, payment reminders, account queries, loan arrears | Outbound + Collections |
| Insurance          | Policy renewals, claims follow-up, lead gen for new policies       | Outbound + Inbound     |
| Telecommunications | Customer retention, billing disputes, technical support triage     | Inbound + Outbound     |
| Healthcare         | Appointment reminders, patient follow-up, admin support            | Outbound + Admin       |



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| INDUSTRY             | TYPICAL USE CASES                                              | RECOMMENDED SERVICE    |
|----------------------|----------------------------------------------------------------|------------------------|
| Retail & E-Commerce  | Order tracking, returns support, customer care                 | Inbound + Admin        |
| Legal & Recoveries   | Soft collections, pre-litigation arrears, client communication | Collections + Outbound |
| Real Estate          | Lead qualification, viewing bookings, landlord/tenant queries  | Lead Gen + Inbound     |
| Energy & Utilities   | Billing support, arrears calling, service queries              | Outbound + Collections |
| Automotive           | Service bookings, customer follow-up, lead generation          | Outbound + Inbound     |
| Education & Training | Enrolment follow-up, student support, course queries           | Inbound + Admin        |
| Technology / SaaS    | Trial conversions, onboarding support, renewal campaigns       | Outbound + Inbound     |
| Charities & NGOs     | Donor outreach, campaign support, community engagement         | Outbound + Admin       |

## 05 PRICING MODELS

EconX Group offers three flexible engagement and pricing models designed to accommodate different campaign types, budget structures, and performance objectives. All rates are confirmed separately in the attached Rate Card or written quote. Pricing below is indicative; final rates depend on campaign scope, volume, and complexity.

All pricing is invoiced in Pounds Sterling (GBP) unless otherwise agreed in writing. A Rate Card is issued separately and forms part of the signed Service Agreement.

### MODEL A — PER SEAT (Monthly / Weekly)

|                                                                |                                             |
|----------------------------------------------------------------|---------------------------------------------|
| PER SEAT MODEL                                                 | From £[RATE] / seat                         |
| Fixed cost per dedicated agent seat — billed weekly or monthly | per agent per week (or per month as agreed) |
| WHAT'S INCLUDED                                                |                                             |



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|                                                                                                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ✓ Dedicated named agent(s) assigned exclusively to your campaign                                                                                                               |
| ✓ Fixed, predictable cost regardless of actual hours worked                                                                                                                    |
| ✓ Agent recruitment, HR, onboarding, and training managed by EconX                                                                                                             |
| ✓ Operations supervision, QA (via QualiCore), and performance management included                                                                                              |
| ✓ Agent workstation, internet connectivity, and equipment provided by EconX                                                                                                    |
| ✓ VIGIL call floor recording active on all seats — full audit trail maintained                                                                                                 |
| ✓ ClockX GPS attendance tracking on all agents — verified hours, no disputes                                                                                                   |
| ✓ Daily activity summaries and weekly performance reports included                                                                                                             |
| ✓ Minimum engagement: 1 seat / 1 week pilot                                                                                                                                    |
| <b>BEST FOR: Clients requiring full-time dedicated agents with predictable monthly costs. Ideal for ongoing campaigns, customer service desks, and long-term partnerships.</b> |
| <i>Note: Seat rate applies per working week (Mon-Fri). Seats not used due to client-side delays remain billable once agent has been onboarded and deployed.</i>                |

MODEL B — PER HOUR (Pay-As-You-Work)

|                                                                                      |                                                           |
|--------------------------------------------------------------------------------------|-----------------------------------------------------------|
| PER HOUR MODEL                                                                       | From £[RATE] / hour                                       |
| Billed precisely for active agent hours worked — no wasted spend                     | per agent per hour worked (minimum 20 hrs / agent / week) |
| WHAT'S INCLUDED                                                                      |                                                           |
| ✓ Pay only for confirmed hours worked by each agent                                  |                                                           |
| ✓ Flexible scaling — increase or reduce agent hours with 48-hour notice              |                                                           |
| ✓ ClockX GPS-verified timesheets provided with each weekly invoice — fully auditable |                                                           |



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|                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ✓ All agent management, QualiCore QA, and VIGIL supervision included                                                                                                                     |
| ✓ Agent workstation, internet, and equipment provided by EconX                                                                                                                           |
| ✓ Weekly invoicing — payment due within 3 business days                                                                                                                                  |
| ✓ Minimum 20 active agent-hours per week to maintain campaign viability                                                                                                                  |
| <b>BEST FOR: Clients with variable volume requirements, project-based campaigns, or those scaling up gradually. Ideal for pilots, seasonal campaigns, and burst-capacity needs.</b>      |
| <i>Note: Hours are logged via ClockX and reported daily. Client sign-off on weekly hour totals required within 24 hours of invoice. Disputes raised after 48 hours are not accepted.</i> |

## MODEL C — HYBRID (Base Hourly + Performance Bonus)

| HYBRID MODEL                                                                                                                                                                 | Base + Bonus                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|
| Low base hourly rate + performance bonus — aligned incentives                                                                                                                | From £[BASE] / hr base rate + agreed performance bonus per outcome |
| WHAT'S INCLUDED                                                                                                                                                              |                                                                    |
| ✓ Reduced base hourly rate compared to Model B                                                                                                                               |                                                                    |
| ✓ Performance bonus paid per agreed outcome: per conversion, per lead, per PTP, etc.                                                                                         |                                                                    |
| ✓ Bonus structure agreed and documented before campaign go-live                                                                                                              |                                                                    |
| ✓ Agents incentivised to deliver results — not just log hours                                                                                                                |                                                                    |
| ✓ Full ClockX hour logs + QualiCore outcome records provided with each invoice                                                                                               |                                                                    |
| ✓ KPIs and performance benchmarks set mutually after pilot analysis                                                                                                          |                                                                    |
| ✓ Pilot phase available to establish baseline before bonus targets are fixed                                                                                                 |                                                                    |
| ✓ Ideal for collections, lead generation, and appointment-setting campaigns                                                                                                  |                                                                    |
| <b>BEST FOR: Collections, sales, lead generation, and appointment-setting campaigns where performance and conversion quality are measurable. Shared risk, shared reward.</b> |                                                                    |



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*Note: EconX does not guarantee specific conversion rates or recovery amounts. Performance is directly dependent on data quality, script effectiveness, and market conditions. Bonus eligibility criteria are defined in the Rate Card addendum.*

## Pricing Model Comparison

|                           | Per Seat         | Per Hour          | Hybrid              |
|---------------------------|------------------|-------------------|---------------------|
| Cost structure            | Fixed per seat   | Variable per hour | Base + bonus        |
| Predictability            | ✓ High           | ■ Medium          | ■ Variable          |
| Flexibility               | ■ Medium         | ✓ High            | ✓ High              |
| Performance alignment     | — Neutral        | — Neutral         | ✓✓ Strongest        |
| Best for volume campaigns | ✓ Yes            | ✓ Yes             | ■ Structured only   |
| Pilot-friendly            | ■ Min 1 seat     | ✓ Yes             | ✓ Yes               |
| Billing cycle             | Weekly / Monthly | Weekly            | Weekly              |
| Minimum commitment        | 1 seat / 1 wk    | 20 hrs / wk       | 20 hrs / wk + pilot |

## 06 CAMPAIGN SETUP & ONBOARDING

EconX Group's structured onboarding process ensures that every campaign is set up correctly, compliantly, and with the best possible foundation for performance. From agreement signing to first live call typically takes 5-10 business days. VIGIL, QualiCore, and ClockX are configured for your campaign before any agent goes live — so surveillance, QA scoring, and attendance tracking are active from day one.

|    |                       |                                                                                                                                                                                                                                          |
|----|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01 | AGREEMENT & RATE CARD | Service Agreement and Rate Card signed. Reference number assigned. Upfront advance payment (equivalent to one week's agreed cost) received to confirm campaign. VIGIL, QualiCore, and ClockX environments provisioned for your campaign. |
|----|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|



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|    |                             |                                                                                                                                                                                                                                                                                      |
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| 02 | CAMPAIGN BRIEF              | Client provides campaign brief, call objectives, target audience profile, and any existing data or lead lists. Data compliance confirmation required. QualiCore scorecard structure is agreed in this phase.                                                                         |
| 03 | SCRIPT & TRAINING MATERIALS | Client provides approved call script, objection handling guide, and brand/tone guidelines. EconX adapts script for agent delivery where needed. QualiCore scorecards and fatal-fail compliance criteria are finalised.                                                               |
| 04 | PLATFORM & SYSTEMS          | Telephony access and CRM credentials provided by client (or agreed alternative platform arranged). VIGIL configured for call floor recording. ClockX workplaces and shift rosters set up. Technical access testing completed across all systems.                                     |
| 05 | AGENT BRIEFING & TRAINING   | Agents are briefed on the campaign, trained on script, and conduct practice calls under QualiCore QA evaluation and VIGIL supervision. Client sign-off on agent readiness before go-live. ClockX attendance tracking activated.                                                      |
| 06 | PILOT PHASE                 | Campaign launches in pilot mode. KPIs tracked and reported daily. QualiCore generates QA scores and coaching reports from day one. VIGIL recordings available for client review. After the agreed pilot period, performance is analysed and targets are refined by mutual agreement. |
| 07 | FULL CAMPAIGN ROLLOUT       | Full campaign operations begin. Weekly invoicing with ClockX-verified hour logs and QualiCore outcome reports attached. Regular check-in calls with Client's campaign manager as agreed.                                                                                             |

07

PAYMENT TERMS & COST RESPONSIBILITY

|               |                                                                                                           |
|---------------|-----------------------------------------------------------------------------------------------------------|
| Currency      | All amounts invoiced in Pounds Sterling (GBP) unless otherwise agreed in writing.                         |
| Rate Card     | Agreed rate confirmed separately in Rate Card or written quote, which forms part of the signed Agreement. |
| Billing Cycle | Invoices issued weekly every Monday for the previous working week.                                        |



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|------------------|--------------------------------------------------------------------------------------------------------------|
| Payment Due      | Payment due within 3 business days of invoice date.                                                          |
| Upfront Advance  | One week's agreed cost payable before campaign commencement. Credited against first invoice.                 |
| Late Payment     | Invoices unpaid beyond 5 business days incur a 5% per week late fee. Services may be paused pending payment. |
| Invoice Disputes | Disputes raised in writing within 48 hours of receipt. Undisputed portions remain payable on time.           |
| Payment Method   | Bank transfer (SWIFT/IBAN for international clients). Banking details provided with first invoice.           |

## Cost Responsibility — What Each Party Provides

| CLIENT PROVIDES                                                                                                                                                                                                                                                                                                                                                                                                   | ECONX GROUP PROVIDES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| - Outbound dialing platform or telephony access (predictive dialer, VOIP lines, or agreed cloud telephony solution) - Call credits and telephony costs - Campaign data / contact lists (GDPR/POPIA compliant and lawfully obtained) - Approved call scripts and objection handling guides - CRM access or lead management system (if applicable) - Compliance documentation and signed data processing agreements | - Trained, managed, and quality-assured call centre agents - Agent recruitment, onboarding, training, and HR management - VIGIL: real-time call floor recording and surveillance (all agents, all sessions) - QualiCore: QA scoring, automated coaching, and audit-ready PDF documentation - ClockX: GPS attendance tracking, leave management, and verified payroll hours - Agent workstation, internet connectivity, and workstation equipment - Daily activity summaries and weekly performance reports - Day-to-day campaign supervision and ongoing agent performance management |

## 08

## DATA PROTECTION, COMPLIANCE & KEY TERMS

### Data Protection

- EconX Group operates in full compliance with POPIA (Protection of Personal Information Act, South Africa), aligned to GDPR (UK/EU) standards. QualiCore is built with 7-year tamper-evident audit log retention and full POPIA/GDPR alignment built in. ClockX handles employee HR data under POPIA No. 4 of 2013 and is compliant with the LRA and



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- The Client is solely responsible for ensuring all contact data provided has been lawfully obtained and is compliant with applicable data protection laws.
- EconX Group processes data only for the purposes agreed within the signed Service Agreement.
- A Data Processing Agreement (DPA) can be signed separately upon request.
- Both parties agree to notify the other within 48 hours of becoming aware of any data breach or compromise. VIGIL recording data is stored securely and accessible only to authorised personnel.

## Confidentiality

Both parties agree to treat all information exchanged in connection with the engagement — including business strategies, client lists, pricing, scripts, and campaign data — as strictly confidential. This obligation survives termination for two (2) years. EconX Group's white-label delivery model ensures that the Client's customers are not informed of EconX Group's involvement unless expressly agreed. VIGIL recordings, QualiCore evaluations, and ClockX payroll data are treated as strictly confidential and never shared with third parties.

## Termination

- Notice Period: Either party may terminate with 7 calendar days' written notice via email.
- Immediate Termination: Permitted by either party in the event of material breach, insolvency, or fraudulent conduct.
- Pilot Exit: Either party may exit at the end of the pilot phase without further obligation, with written notice before the pilot end date.
- All outstanding invoices for services rendered remain payable within 5 business days of termination.
- Upon termination, EconX Group returns or securely destroys all client data — including VIGIL recordings, QualiCore evaluation records, and campaign data — within 14 business days, confirmed in writing.

## Limitation of Liability

EconX Group's total liability is capped at fees paid in the four (4) weeks preceding the claim. EconX Group is not liable for loss of revenue from campaign performance, damages from poor data quality or inadequate scripts, third-party platform failures (including telephony or dialing platforms provided by the Client), or regulatory penalties arising from the Client's own non-compliance.

## Dispute Resolution



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- Step 1: Direct resolution attempted within 14 calendar days of dispute arising.
- Step 2: Independent mediation — costs shared equally if direct resolution fails.
- Step 3: Jurisdiction as agreed at signing (default: South African law).

## 09 WHY CHOOSE ECONX GROUP

|                                                                                                                                                                                                                            |                                                                                                                                                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>✓ <b>White-Label by Default</b></p> <p>Your customers only know your brand. Every call is made in your name, under your script, at your standard. VIGIL, QualiCore, and ClockX operate invisibly in the background.</p> | <p>✓ <b>Proprietary Tech Infrastructure</b></p> <p>VIGIL (call floor surveillance), QualiCore (QA &amp; coaching), and ClockX (workforce &amp; payroll) are built and operated by EconX Group — not bolted-on third-party tools.</p> |
| <p>✓ <b>Experienced Operations Team</b></p> <p>Our supervisors and QA managers are hands-on, experienced BPO professionals — not junior coordinators. Every campaign managed by qualified operational leadership.</p>      | <p>✓ <b>Transparent Reporting</b></p> <p>Daily activity summaries and weekly performance reports delivered on time, every time. QualiCore dashboards and VIGIL recordings available on request. No black boxes.</p>                  |
| <p>✓ <b>POPIA &amp; GDPR Aligned</b></p> <p>Fully compliant data handling. QualiCore stores 7-year tamper-evident audit logs. ClockX handles HR data under POPIA. DPAs available on request.</p>                           | <p>✓ <b>Cape Town Talent Pool</b></p> <p>South Africa's strong English-speaking workforce at competitive rates — without sacrificing quality or professionalism.</p>                                                                 |
| <p>✓ <b>Scalable Fast</b></p> <p>Pilot with 1 agent. Scale to 20+ with advance notice. VIGIL, QualiCore, and ClockX scale with you — we onboard new agents fully provisioned from day one.</p>                             | <p>✓ <b>Timezone Advantage</b></p> <p>GMT+2 means we align naturally to UK and EU business hours with minimal overlap friction.</p>                                                                                                  |

## 10 NEXT STEPS — HOW TO PROCEED

We are ready to begin as soon as we have your commitment. The process from signed agreement to first live call is fast, straightforward, and fully managed by EconX Group — with VIGIL, QualiCore, and ClockX configured and ready before your first agent goes live. Here is what happens next:



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|   |                              |                                                                                                                                                                                             |
|---|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | REVIEW THIS PROPOSAL         | Share internally and identify which service model best fits your campaign requirements.                                                                                                     |
| 2 | CONFIRM PRICING MODEL        | Let us know which model you want to proceed with. We will issue a Rate Card and finalised Service Agreement within 24 hours.                                                                |
| 3 | SIGN AGREEMENT & PAY ADVANCE | Return the signed Service Agreement. Submit the upfront advance payment (one week's cost) to confirm your campaign slot. VIGIL, QualiCore, and ClockX environments provisioned immediately. |
| 4 | BRIEF US ON YOUR CAMPAIGN    | Provide your campaign brief, contact data, and script. We will review, align, build your QualiCore scorecards, and prepare agents.                                                          |
| 5 | PILOT LAUNCH                 | We go live. VIGIL active on all agents from day one. QualiCore QA scores and coaching reports generated daily. ClockX attendance logs included with every report.                           |
| 6 | FULL ROLLOUT                 | Full campaign operation begins. Weekly invoicing with ClockX-verified hours and QualiCore performance data. Ongoing reporting and performance management.                                   |

|                 |                        |                 |                    |
|-----------------|------------------------|-----------------|--------------------|
| READY TO START? | philani@econxgroup.com | +27 67 157 9128 | www.econxgroup.com |
|-----------------|------------------------|-----------------|--------------------|

*This proposal is valid for 30 days from the date of issue. All pricing is indicative pending Rate Card confirmation. This document is confidential and intended solely for the named recipient.*