

Annex I – Details of Processing

This Annex forms part of the Data Processing Agreement (DPA) between Rizer Inc. (“Processor”) and the Customer (“Controller/Business”).

1. Categories of Data Subjects

The personal data processed by Rizer may concern the following categories of individuals (as imported by Customer into its CRM or generated through the Service):

- Prospects and potential customers.
 - Existing customers or contacts of Customer.
 - Customer’s employees or representatives involved in sales processes.
 - Support or sales call participants (where recordings/transcripts are imported).
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2. Categories of Personal Data

Customer determines the personal data it imports into Rizer. Typical categories may include:

- **Identity & contact details:** name, email address, phone number, company name, job title.
- **CRM activity data:** deal records, pipeline stage, lost/win reason, notes.
- **Communications data:** emails, meeting notes, call recordings or transcripts (subject to Customer obtaining necessary consent).
- **Technical data:** session identifiers, timestamps, activity metadata.
- **Derived/analytical data:** AI-generated insights, recommendations, scoring, or classification.

Special/sensitive categories of data (e.g., health, biometric, racial/ethnic, political opinions) are **not required or intentionally processed** by Rizer. Customer agrees not to upload such data.

3. Nature and Purpose of Processing

Processing activities include:

- Importing Customer Data from Customer's CRM.
- Storing Customer Data in Rizer's secure environment.
- Sending Customer Data to AI inference sub-processors (e.g., OpenAI, Google Gemini, Anthropic Claude) for the sole purpose of generating analysis, insights, and re-engagement recommendations.
- Enriching Customer CRM with insights (e.g., new deal creation, AI-assisted notes).
- Providing analytics dashboards and reporting to Customer.
- Supporting product improvement and troubleshooting.

The purpose of processing is strictly limited to:

- Lost deal analysis and root cause identification.
 - Re-engagement of past opportunities.
 - Customer success support and product optimization.
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4. Duration of Processing

- Processing continues for the duration of the Customer's subscription to the Service.
 - Upon termination, Customer Data is deleted within **30 days** (unless legal obligations require longer retention).
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5. Roles and Instructions

- **Customer** is the Controller/Business and retains full ownership of Customer Data.
 - **Rizer** is the Processor/Service Provider and acts only on documented instructions from Customer, as set forth in the DPA and these Annexes.
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6. Sub-Processors Involved in Processing (linked to Annex III)

- **OpenAI** – AI-based text analysis and recommendations.
- **Google Gemini (Google Cloud)** – AI inference, NLP, and hosting.
- **Anthropic Claude** – AI reasoning and summarization.
- **Google Analytics via Google Tag Manager** – Website usage analytics (controller context only).