



ANNEXURE-B

SALES PERSON (SP) OPERATIONS, DUTIES, REPORTING & FRAMEWORK

1. PURPOSE OF THIS DOCUMENT

- a. This Annexure-B defines:
 - i. Duties, responsibilities, and expectations of the Salesperson ("SP").
 - ii. Daily, weekly, and ongoing operational requirements.
 - iii. Mandatory systems, reporting formats, and communication protocols.
 - iv. Permitted and restricted activities.
- b. This document shall act as a **binding operational guideline** and shall be read in conjunction with:
 - i. Sales Commission and Business Referral Agreement, and
 - ii. Salesperson Terms & Conditions, and
 - iii. Deal Confirmation & Commission Acknowledgement (DCC Ack.) (whenever active), and
 - iv. Consultant's Terms & Conditions, Privacy Policy, Refund Policy, and
 - v. All other policies, guidelines, rules, regulations and agreements provided by the Consultant from time to time, all available publicly.

Any changes or amendments to this Annexure-B by the Consultant shall be duly communicated to all such concerned SPs bound by it. Such right of changes or amendments by the Consultant shall be absolute, unrestricted and undisputed.

2. CORE RESPONSIBILITIES OF SP

- a. The SP shall:
 - i. Generate and/or bring **qualified or converted leads**.
 - ii. Ensure **accuracy and authenticity of all leads**.
 - iii. Maintain **complete transparency in communication**.
 - iv. Follow **all instructions issued by Consultant**.
 - v. Maintain **professional conduct at all times**.

3. DAILY WORKING EXPECTATIONS & RULES

- a. SP shall:
 - i. Actively reach out to potential clients.
 - ii. Follow up with existing leads (if any).
 - iii. Update all activities in the **Google Sheet (as provided by the Consultant)**.
 - iv. Respond to Consultant communications promptly.
 - v. Maintain accuracy, completeness, and clarity.
 - vi. All client relationships belong to Consultant, not SP.
 - vii. Date Entry Rules:
 1. No incomplete entries.
 2. No fake or placeholder data.
 3. No duplicate leads.

Any violation of this 'Data Entry Rules' shall attract: Rejection of lead + loss of commission (if any) + Termination of the Concerned SP, Agreement AND any active DCC Ack. (if any).
 - viii. Lead Quality Requirements:
 1. Be genuine and verifiable.
 2. Have a real requirement.
 3. Have valid contact details.
 4. Not be older than 30 days, starting from submission to the Consultant.



5. Lead ownership is confirmed only after Consultant acceptance.
6. If multiple SPs claim same lead, then Consultant decision shall be final.
7. Define clear stages of the Lead; Example: New, Contacted, Interested, Converted, etc.

Any violation of this 'Lead Quality Requirements' shall attract: Rejection of lead + loss of commission (if any) + Termination of the Concerned SP, Agreement AND any active DCC Ack. (if any).

4. **COMMUNICATION PROTOCOLS**

- a. All official communications shall only be done via official email only. No other mode or medium shall be recognized by the Consultant as 'official' under any circumstances.
 - i. Respective official emails for the SPs to communicate are mentioned below.
 - ii. Please follow the set procedure for efficiency and smooth communications.
 - iii. SPs are directed to compulsorily use the 'email ID' they provided officially to the Consultant when they were onboarded official by the Consultant.
 - iv. Communications from any other un-recognized email shall not be accepted.
 - v. EXCEPTION: If the SP lost his/her access to their respective official email ID, then they may contact the Consultant via any other appropriate email ID. The Consultant reply to the same shall be subject to identity verification as decided by the Consultant respectively.
- b. **WHATSAPP GROUP BEHAVIOUR**
 - i. WhatsApp shall ONLY be used for unofficial, day-to-day messages for convenience only. No communication of any type via WhatsApp shall be deemed 'official' under any circumstances.
 - ii. SP shall:
 1. Communicate professionally.
 2. Share only relevant updates.
 3. Respond within 72 hours.
 - iii. SP shall NOT:
 1. Spam messages.
 2. Share irrelevant content.
 3. Engage in arguments.
- c. **EMAIL COMMUNICATION FORMAT (FOR LEADS/CLIENT QUERY)**

For queries/issues related to any Lead/Client, SP shall contact:
Immediate Manager → Mr. Lavish Thaploo, Sales & Marketing Head, Founding Partner.
l.thaploo@vilasaniventures.com
Subject Line Format:
[VV SP ID] → [Lead/Client Name + ID (if available)] → [Query in Short]
Example: 2601 – ABC Pvt Ltd – Not Responding to My Contacts
- d. **EMAIL COMMUNICATION FORMAT (FOR ANY OTHER QUERY)**

For queries/issues, SP shall contact:
Immediate Manager → Mr. Lavish Thaploo, Sales & Marketing Head, Founding Partner.
l.thaploo@vilasaniventures.com
Subject Line Format:
[VV SP ID] → [Subject/Query]
Example: 2601 – Need to Change my Password of Digital Portal

Secondary Contact → Mr. Niteesh Sharma, Tech & Legal Head, Founding Partner
n.sharma@vilasaniventures.com
Subject Line Format:



[VV SP ID] -> [Subject/Query]

Example: 2601 – Need to Change my Password of Digital Portal

5. MEETING & REPORTING REQUIREMENT:

- a. SP shall attend all **virtual/physical meetings** when required and join on time and participate actively.
- b. The schedule and timing of the same shall be officially communicated by the Consultant promptly in advance.
- c. SP are compulsorily required to attend such meetings. However, if unable to do so, they are mandatorily required to mention their official reasons and communicate the same via official email to the Consultant.
- d. Repetitive absence from such meetings, even with valid reasons, may lead to termination of the Concerned SP, Agreement AND any active DCC Ack. (if any).

6. DO's AND DON'Ts (MANDATORY BEHAVIOUR)

- a. DO's:
 - i. Follow all instructions strictly.
 - ii. Maintain honesty and transparency.
 - iii. Represent Consultant professionally.
 - iv. Use approved communication formats.
 - v. Maintain data confidentiality.
 - vi. Route all clients to Consultant.
 - vii. Ensure all payments go to Consultant.
 - viii. Must use only official systems.
- b. DON'Ts (STRICTLY PROHIBITED):
 - i. Misrepresent services or pricing.
 - ii. Commit anything without approval.
 - iii. Deal with clients independently.
 - iv. Accept any payment in any form.
 - v. Share or misuse data.
 - vi. Use Consultant's name improperly.
 - vii. Handle Client's money.
 - viii. Negotiate final pricing.
 - ix. Promise deliverables.
 - x. Be aggressive with the Client/Lead, use pressure tactics or mislead urgency.
 - xi. Cannot store client data offline.

Any violation of this 'Do's and Don'ts shall attract: Termination of the Concerned SP, Agreement AND any active DCC Ack. (if any).

7. PERFORMANCE MONITORING

- a. SP performance shall be strictly evaluated based on:
 - i. Lead quality AND acceptance by Consultant.
 - ii. Conversion rate, as per Consultant's internal standards.
 - iii. System compliance.
 - iv. Professional behaviour.
 - v. Number of dead or invalid leads.

Any violation of this 'Performance Monitoring' shall attract: Termination of the Concerned SP, Agreement AND any active DCC Ack. (if any).



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8. DIGITAL PORTAL ACCESS & SECURITY

- a. SP shall:
 - i. Keep login credentials (as provided by the Consultant) confidential.
 - ii. Not have the right to change the 'password' of such Digital Portal under any circumstances.
 - iii. Not share access (provided link or password) of the same to anyone.
 - iv. Not misuse system by any medium or through and by any means.
 - v. Shall not leak such provided information by any means, to any third party under all circumstances.
- b. If the concerned SP is found to have shared access of their Digital Portal to any third party except themselves, then the Consultant shall not be liable for any leak of any such information provided there.
- c. Digital Portal's information, as shown and updated by the Consultant, shall be full and binding, and shall not be disputed by the concerned SP under all circumstances.
Any violation of this 'Digital Portal Access & Security' shall attract: Termination of the Concerned SP, Agreement AND any active DCC Ack. (if any).

9. NON-COMPLIANCE CONSEQUENCES

- a. Failure to follow this Annexure shall lead to any one or more of the following:
 - i. Lead rejection.
 - ii. Commission denial.
 - iii. Warning.
 - iv. Termination.
 - v. Blacklisting.
- b. The decision(s) of such termination OR blacklisting (due to any reason) shall be at the total discretion of the Consultant only. The said decision shall not be disputed by the concerned SP, and shall be fully valid once communicated from our side to the concerned SP's official email ID.
- c. However, the decision(s) of such commission denial, warning or lead rejection (if any) may be communicated to the concerned SP, at appropriate time and medium by the Consultant.

10. ABSOLUTE COMPLIANCE DECLARATION

- a. The SP confirms that:
 - i. They have read and understood this Annexure.
 - ii. They agree to follow all rules and procedures.
 - iii. They accept consequences of non-compliance.
 - iv. This Annexure is subject to all other policies provided by the Consultant, as mentioned in **Section-1(b)** of this Annexure.

THIS ANNEXURE-B LAST UPDATED: 06th April, 2026



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