

# PRIVACY POLICY

**Effective Date:** October 15, 2025

## I. INTRODUCTION

Welcome to <https://shiftupai.com/>. This site is owned and operated by ShiftUp Inc. (“ShiftUp,” “we,” or “us”). This Privacy Policy governs your use of our website and our Salesforce-native application (“Application”) (together, the “Site”). By accessing or using the Site, you acknowledge that you have read, understood, and agree to this Privacy Policy. Your use of this Site indicates your consent.

This Privacy Policy is organized into the following sections:

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## II. INFORMATION WE COLLECT

### *Defining Personally Identifiable Information*

Personally identifiable information is any information collected by us or provided by you that with reasonable efforts could be used to identify you. Personally identifiable information includes the information you give to us directly, the information we automatically collect, and when applicable, information supplied to us by third parties. Specifically, we may collect the following types of information:

- information that directly identifies you, such as your name, business email address, phone number, company name, role or title, and other contact details provided during registration, contact forms, newsletter sign-ups, demo requests, onboarding, use of the Application, or support inquiries;
- account and billing information (e.g., plan selection, invoicing details, and, where applicable, limited payment-related information from a third-party payment processor, if used);
- CRM Data You Connect: records and metadata from your organization’s Salesforce instance that your administrator authorizes us to access (for example, account, contact, and opportunity records; notes and tasks; fields and custom objects relevant to revenue intelligence);
- information regarding your requests for services or assistance;
- approximate geolocation derived from your IP address;
- information about your interactions with the Site; and

- analytics and device data such as IP address, device and browser type/version, operating system, referring source, and diagnostic logs.

Please note that ShiftUp's product is designed to operate inside Salesforce and to leverage existing enterprise security and compliance controls of that environment.

### **III. HOW WE COLLECT YOUR INFORMATION**

We collect this information in the following ways: directly from you; automatically using technology like cookies, web bugs, and other web technologies; and directly from our partners and vendors.

#### *Information Directly From You*

As you use the Site, we collect information you provide directly, including:

- Contact Information: name, business email, company, role/title, and other details submitted during registration, contact forms, newsletter sign-ups, demo requests, onboarding, or support communications.
- CRM Connection and Settings: configuration choices you or your administrator provide when connecting your Salesforce instance to the application (e.g., permission scopes, field mappings).
- Messages/Notes: content you submit via text boxes, feedback forms, surveys, and communications with our support team.
- Account Information: username and email for the Salesforce user setting up the ShiftUp product integration

#### *Information Automatically Collected Using Technology*

We use cookies, pixels, log files, and similar technologies to collect: (i) usage data (pages/features used, clickstream, time on page), (ii) device/technical data (IP address, device and browser type/version, OS, referral source), and (iii) approximate geolocation from IP. We may use analytics and advertising tools (for example, Google Analytics/GA4 and LinkedIn Insight Tag). Where required by law, we obtain consent via our cookie banner and honor your choices through that banner and/or your browser settings. These technologies do not collect personally identifiable information but may be used in conjunction with other information gathered. Over time, we may also collect information about your other activities online and combine this information for the purposes of behavioral profiling.

#### *Do Not Track*

Browsers and devices allow individuals to send "do not track" signals to websites. At this time, we do not take actions to respond to "do not track" signals.

#### *Information From Third Parties*

We may receive information from service providers and partners that help us deliver, secure, and support the Site (e.g., hosting, analytics, error monitoring, customer-support tooling). In addition, when your organization connects Salesforce, we process CRM data that your administrator authorizes for use with our revenue-intelligence features.

#### *Payment Information*

Payments for our services may be processed by third-party payment processors. We do not store full payment card numbers. The payment processor's privacy policy governs its handling of payment information.

### **IV. HOW WE USE YOUR INFORMATION**

We collect and use information from you for the following purposes:

- to operate and maintain our site
- to present our content to you through our site
- to communicate with you
- to fulfill our obligations to you as presented when you provided the information
- to notify you about changes to our site
- to enhance and optimize your experience
- to process authorized Salesforce CRM data using AI/LLM tools to surface opportunity signals, create account and opportunity insights, and recommend next-best actions for sellers
- to generate guided selling outputs inside Salesforce, such as account plans, opportunity hypotheses, and conversation roadmaps
- to support user accounts, onboarding, and product support
- to communicate product updates, billing notices, and transactional messages
- to respond to your requests, feedback, or inquiries
- to conduct marketing and promotional campaigns (subject to consent, and opt-out options)
- to develop and improve features (including optional beta waitlists, newsletters, and scheduling tools)
- to comply with legal, regulatory, and contractual obligations
- to leverage your organization's existing Salesforce security/compliance posture in connection with our Salesforce-native deployment.
- for any other purpose within your consent

In some instances, we also use information to contact you about goods and services that you may find valuable; however, if you would not like to receive information about ongoing promotions or tools we believe are relevant to you, please contact us at [privacy@shiftupai.com](mailto:privacy@shiftupai.com).

#### *Targeted Advertising*

When you visit our Site, cookies and pixels may be used for analytics and advertising, which can constitute “sharing” for cross-context behavioral advertising under the CPRA. You can opt out via our cookie banner where available and through the platform controls linked below.

- <https://www.google.com/settings/ads/anonymous>
- <https://www.facebook.com/settings/?tab=ads>

You can also visit <https://optout.aboutads.info> to control the collection of web data on your computer and to opt out of additional targeted marketing.

## **V. HOW WE SHARE YOUR INFORMATION**

Though we do not sell or disclose the personal information we collect in the ordinary course of our business, we may share your data with third parties in accordance with the purposes described above. In providing a Salesforce-native application, we process CRM data within or in connection with your Salesforce environment as authorized by your administrator. We also use service providers (*e.g.*, hosting, analytics, support, and payment processing) under contracts that limit their use of personal information to providing services to us. Additionally, in the course of business, if we buy or sell business assets or participate in a company sale, merger, reorganization, or dissolution, the data we have collected may be

part of such business transfers. Below is a non-exhaustive list of some of the partners and vendors we use to provide our services and conduct business:

- **Google Analytics.** Google Analytics is a tool used to discover user demographics and behavior. You can reference Google’s privacy policy regarding how they handle information collected by visiting <https://policies.google.com/privacy>.
- **Google Adsense.** Google Adsense is an advertising program created by Google that allows website owners to display ads on their websites. You can learn more about Google’s policy for handling information collected by visiting <https://policies.google.com/privacy>.
- **OpenAI, Google Gemini, or similar LLM APIs.** We use OpenAI or similar providers for processing text and extracting construction scope. and you can visit its site at chatgpt.com.

This list is subject to change at our discretion. If you would like more information about our third-party partners, please visit their specific privacy policy pages that describe their practices.

## **VI. HOW WE PROTECT YOUR INFORMATION**

As a company, the protection of your information is important to us. We have designed and adopted technological and organizational procedures to safeguard your data. It is important to note that while we make efforts to protect your data, security measures are not impenetrable. As a result, we cannot guarantee the absolute security of any information collected or transmitted to our Site. By using our Site, you consent to the transmission of your data at your own risk. Additionally, if you have registered for an account on our Site, you should not share your password or username with any other third parties. It is your responsibility to keep this information confidential. For enterprise customers using our Salesforce-native deployment, we leverage the security and compliance controls of your Salesforce environment in addition to our own organizational and technical safeguards.

## **VII. NO USE BY CHILDREN**

The Site is not directed to, or intended for use by, individuals under 18. We do not knowingly collect personal information from anyone under 18. If you are under 18, do not use the Site or provide any information to us. If we learn we have collected personal information from someone under 18, we will delete it.

## **VIII. CORRECTING OR UPDATING YOUR INFORMATION**

If you discover that inaccurate information about you has been collected, or if you would like to update the information we currently have, please contact us at [privacy@shiftupai.com](mailto:privacy@shiftupai.com) or by mail at ShiftUp Inc., 3762 E Zachary Drive, Phoenix, AZ 85050.

## **IX. SPECIFIC CALIFORNIA RESIDENT RIGHTS**

This section is only applicable for individuals who reside in California and should be read in conjunction with our entire Privacy Policy. If you are a California resident, you have the right to

- obtain additional information about “personal information” (as defined in the California Consumer Privacy Act (CCPA));
- request that we disclose certain information collected, used, disclosed, and sold about you;
- request deletion of your personal information; and
- opt out of the sale or sharing of your personal information.

The information covered by these specific rights is information that could be reasonably linked to you. It excludes information that cannot be reasonably linked to you. To help you better understand our practices, the chart below describes the categories of personal information collected, the sources of this information,

how we use this information, and with which third parties we have shared this information within the past twelve months.

Categories of Information Collected	Sources of Information	How we use this information	Third parties to which we have disclosed or shared this information
<b>Identifiers</b>	Directly from you Social media network partners Device technologies Service provider partners	To fulfill our obligations to you as presented when you provided the information To notify you about changes to our site To enhance and optimize your personal experience To inform you of services you may find valuable For marketing and advertising purposes To identify flaws and bugs within our system To comply with security, fraud, and legal requirements	Social media network partners Device technologies Service provider partners
<b>Customer Records Personal Information</b>	Directly from you Social media network partners Device technologies Service provider partners	To fulfill our obligations to you as presented when you provided the information To notify you about changes to our site To enhance and optimize your personal experience To inform you of services you may find valuable For marketing and advertising purposes To identify flaws and bugs within our system To comply with security, fraud, and legal requirements	Social media network partners Device technologies Service provider partners
<b>Classifications of information protected under California or federal law</b>	Directly from you Social media network partners Device technologies Service provider partners	To fulfill our obligations to you as presented when you provided the information To notify you about changes to our site To enhance and optimize your personal experience To inform you of services you may find valuable For marketing and advertising purposes To identify flaws and bugs within our system To comply with security, fraud, and legal requirements	Social media network partners Device technologies Service provider partners
<b>Commercial information</b>	Directly from you Social media network partners Device technologies Service provider partners	To fulfill our obligations to you as presented when you provided the information To enhance and optimize your personal experience To inform you of services you may find valuable For marketing and advertising purposes To identify flaws and bugs within our system To comply with security, fraud, and legal requirements	Social media network partners Device technologies Service provider partners
<b>Internet or electronic network activity information</b>	Directly from you Social media network partners Device technologies	To fulfill our obligations to you as presented when you provided the information To enhance and optimize your personal experience To inform you of services you may find valuable	Social media network partners Device technologies Service provider partners

	Service provider partners	For marketing and advertising purposes To identify flaws and bugs within our system To comply with security, fraud, and legal requirements	
<b>Geolocation data</b>	Directly from you Social media network partners Device technologies Service provider partners	To fulfill our obligations to you as presented when you provided the information To enhance and optimize your personal experience To inform you of services you may find valuable For marketing and advertising purposes To identify flaws and bugs within our system To comply with security, fraud, and legal requirements	Social media network partners Device technologies Service provider partners
<b>Professional or employment information</b>	Directly from you	To fulfill our obligations to you as presented when you provided the information To enhance and optimize your personal experience To inform you of services you may find valuable For marketing and advertising purposes To comply with security, fraud, and legal requirements	Device technologies Service provider partners
<b>Consumer inference information</b>	Social media network partners Device technologies Service provider partners	To enhance and optimize your personal experience To inform you of services you may find valuable For marketing and advertising purposes	Social media network partners Device technologies Service provider partners

If you have any questions, comments, or concerns about this Privacy Policy or our services, please contact us at [privacy@shiftupai.com](mailto:privacy@shiftupai.com) or by mail at ShiftUp Inc., 3762 E Zachary Drive, Phoenix, AZ 85050.

**X. UPDATES TO THIS POLICY**

We may update this policy from time to time. If any updates are made to this policy, they will be posted here. Additionally, if material changes are made to this policy, we will notify you via a notice to this Site, and registered users will receive an additional email. Please check this page frequently for updates.

**XI. CONTACT US**

If you have any questions, comments, or concerns about this Privacy Policy or our services, please contact us at [privacy@shiftupai.com](mailto:privacy@shiftupai.com) or by mail at ShiftUp, Inc., 3762 E Zachary Drive, Phoenix, AZ 85050.