

Privacy Policy

Last Updated: 3rd October 2025

This Privacy Policy explains how Precursive Ltd and its subsidiaries (including Precursive Inc, the Services Delivery Alliance, or SDA) collect, use, and protect your personal data. It applies to visitors of our websites, users of our products and services ("Services"), and participants in our professional services community.

1. Scope of this Policy

This Policy applies to:

- Visitors to our websites, including www.precursive.com and www.servicesdeliveryalliance.com
- Customers using the Precursive Services
- Participants in SDA-hosted events, webinars, and online communities

2. Who We Are

Precursive is a provider of professional services automation software and operates the Services Delivery Alliance (SDA), a community of professional services leaders. For the purposes of this Policy, 'we', 'us', or 'our' refers to Precursive Ltd, Precursive Inc., and affiliated entities.

3. The Data We Collect About You

We may collect, use, store and transfer different kinds of personal data about you including:

- Identity Data (name, username or similar identifier, title)
- Contact Data (email address, phone numbers)
- Technical Data (IP address, browser type, time zone, location, cookies)
- Profile Data (login credentials, preferences, feedback)
- Usage Data (how you use our website, Services)
- Marketing and Communications Data (your preferences in receiving marketing from us)

4. Cookies and Similar Technologies

We use cookies and similar tracking technologies to enhance your experience on our websites, analyze site traffic, and support our marketing activities. Cookies are small text files placed on your device by a website. Some cookies are necessary for the site to function properly, while others are used to provide insights into how the site is being used or to deliver personalized advertising.

We use the following types of cookies:

Essential cookies: Required for the website to function and cannot be switched off.

Analytics cookies: Help us understand how visitors interact with our websites (e.g., Google Analytics, Leadfeeder).

Marketing cookies: Used for advertising and retargeting (e.g., HubSpot, LinkedIn, Drift).

You can manage or withdraw your cookie preferences through the cookie consent banner displayed when you visit our websites, or by adjusting your browser settings. Disabling certain cookies may impact your user experience.

For more detailed information about the specific cookies we use and their purposes, please contact us at privacy@precursive.com.

5. How We Collect Your Personal Data

We use different methods to collect data from and about you including through:

- Direct interactions (forms, emails, phone calls)
- Automated technologies (cookies, server logs)
- Third parties or publicly available sources (analytics providers, search engines, social networks)

6. How We Use Your Personal Data

We will only use your personal data when the law allows us to. Most commonly, we will use it:

- To perform the contract we are about to enter into or have entered into with you
- To comply with a legal or regulatory obligation
- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests
- Where you have given consent for specific purposes

7. Disclosures of Your Personal Data

We may share your personal data with:

- Internal teams within Precursive and SDA
- External third parties (e.g., service providers, professional advisers)
- Legal and regulatory bodies when required by law

8. International Transfers

Some of our external third parties are based outside the UK/EEA, so their processing of your personal data will involve a transfer of data internationally. Whenever we transfer your personal data out of the UK/EEA, we ensure a similar degree of protection is afforded to it, such as using Standard Contractual Clauses (SCCs).

9. Data Security

We have put in place appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. We also limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know.

10. Data Retention

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for, including satisfying any legal, accounting, or reporting requirements.

11. Your Legal Rights

Under data protection laws, you have rights including:

- Right to access your personal data
- Right to request correction or erasure
- Right to object to processing or request restriction
- Right to data portability
- Right to withdraw consent at any time

12. Contact and Complaints

If you have any questions about this privacy notice or our data practices, you can contact us at privacy@precursive.com. You also have the right to lodge a complaint with the Information Commissioner's Office (ICO) at www.ico.org.uk, but we would appreciate the opportunity to resolve your concerns before you approach the ICO.

13. Sub-processors

We engage third-party service providers ("sub-processors") to support the operation of our business and the delivery of our services. These sub-processors may process personal data on our behalf and operate under data processing agreements consistent with applicable data protection laws.

We distinguish between:

A. Marketing and General Business Sub-processors

These sub-processors assist with business operations such as customer relationship management (CRM), email communications – including AI powered chatbots on our websites, analytics, advertising, lead generation, and support systems. While they may process business contact (such as Name, email and company) or usage data, they do not access customer content

or sensitive service-related information. A full list of these sub-processors is available upon request by contacting privacy@precursive.com.

B. Product – Precursive PSA Solution

Sub-processor	Purpose	Location	Link
Salesforce (Customer Org)	Platform infrastructure (Hosting)	Customer defined	https://www.salesforce.com/

C. Product – Precursive AI Solution

Sub-processor	Purpose	Location	Link
Open AI	Generation of natural language responses via LLM	USA	https://openai.com/
Azure Open AI	Generation of natural language responses via LLM	UK/EU (Customer choice)	https://azure.microsoft.com/en-us

14. Nature of Processing Activities

Our processing of personal data includes the following activities:

- Collecting and storing personal data
- Hosting and securing data on our and our subprocessors' infrastructure
- Accessing and retrieving personal data to provide support and services
- Analyzing user behavior to improve functionality and experience
- Communicating with users via email, chat, or telephone
- Managing subscriptions, transactions, and customer accounts
- Monitoring and auditing use of our services for compliance and security