

# PRIVACY NOTICE

## Introduction & Contents

The Services Delivery Alliance (SDA) and [servicesdeliveryalliance.com](https://servicesdeliveryalliance.com) is a community group created by Precursive Ltd and therefore subject to the following privacy policy.

Precursive Ltd, a company incorporated in England and Wales with registered address 81 Mundania Road, London, SE22 0NW (registered company number 07481246), and our group of companies (including our subsidiary Tapply Ltd, a company incorporated in England and Wales with registered address 27 Cowley Crescent, Hersham, Walton-On-Thames, Surrey, England, KT12 5RH) (**Precursive, we, our, us**) respects your privacy and is committed to protecting your personal data. This privacy notice explains how we use and protect the personal data you provide to us. It also explains your privacy rights and protections.

We have tried to keep this privacy notice simple without compromising on the information provided to you. Our privacy policy has been broken down into the following sections:

### SECTION HEADING

- 1. Important information & our details**
- 2. The data we collect about you**
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## **1. Important information & our details**

### **Purpose of this privacy notice**

This privacy notice gives you information about how we collect and process personal data you provide to us, including any data you provide via our website (<https://precursive.com/>) (our **Site**),

when you register with us, use our software or platform (together, **Platform**) or receive services or when you contact us via our website or the Salesforce AppExchange.

This privacy notice should be read together with any other privacy notice or fair processing notice we may provide when we are collecting or processing personal data about you. This privacy notice supplements any other notices and is not intended to override them.

Our business offering is not intended for children and we do not knowingly collect data relating to children.

### **Our contact details and role**

We collect, use and are responsible for certain personal information about you. When we do so we are subject to applicable data protection laws and we are responsible as 'controller' of that personal information for the purposes of those laws. Our contact details are:

Email address: [support@precursive.com](mailto:support@precursive.com)

Postal address: 81 Mundania Road, London, SE22 0NW

If you have any questions about this privacy notice, including any requests to exercise your legal rights (see section 9 below), please contact us via email at [support@precursive.com](mailto:support@precursive.com).

You have the right to make a complaint at any time to the Information Commissioner's Office (ICO) ([www.ico.org.uk](http://www.ico.org.uk)), which is the supervisory authority for UK data protection issues. However, we ask that you contact us in the first instance and give us the opportunity to address your concerns before you consider contacting the ICO.

### **Changes to the privacy notice and your duty to inform us of changes**

It is important that the personal data we hold about you is accurate and current, so please let us know if your personal data changes at any time.

### **Third-party links**

Our Site and our Platform may include links to third-party websites, vendor offerings or other applications, plug-ins and/or applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you. We do not control these third-party websites and are not responsible for their privacy statements. When you leave our website, you should read the privacy notice of any website you visit.

## **2. The data we collect about you**

Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed

(anonymous data).

We may collect, use, store and transfer the following kinds of personal data about you, which we have summarised into categories:

- **Identity Data** includes first name, maiden name, last name, username or similar identifier, title, date of birth, gender, company information, Salesforce licence and related details and, if applicable, any payment details such as credit card or bank account details or similar information you provide by filling in forms on our Site.
- **Contact Data** includes billing address, delivery address, email address and telephone numbers.
- **Usage Data** includes information about how you use our website, products and services (including without limitation your IP address, geographical location, browser type and version, operating system, referral source, length of visit, page views and site navigation, traffic data, weblogs, browser usage and other communication data and the resources that you access) and information provided if or when you report a problem or require support.
- **Marketing and Communications Data** includes your preferences in receiving marketing from us and our third parties and your communication preferences including any information you choose to provide in responding to surveys that we use for research purposes (although there is no obligation to provide any such information).

The above categories are used as defined terms elsewhere in this privacy notice, in particular section 4. We do not collect any **Special Categories of Personal Data** about you (this includes details about your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, information about your health and genetic and biometric data). Nor do we collect any information about criminal convictions and offences.

#### **If you fail to provide personal data**

Where we need to collect personal data by law, or under the terms of a contract we have with you, and you fail to provide that data when requested, we may not be able to perform our obligations under our contract with you. In that case, we may have to cancel a product or service but we will notify you if so.

### **3. How your personal data is collected**

We use different methods to collect your personal data including through:

**Directly from you.** You may give us your Identity, Contact, Usage and Marketing and

Communications Data by filling in forms or by corresponding with us by post, phone, email or otherwise. This includes personal data you provide when you:

- apply for our products or services;
  - create an account on our Site;
  - subscribe to our service or publications;
  - request marketing to be sent to you;
  - enter a competition, promotion or survey;
  - complete a form on our Site; or
  - give us some feedback.
- **Automated technologies or interactions.** As you interact with our Site or our Platform, we may automatically collect Usage Data about your equipment, browsing actions and patterns. We collect this personal data by using cookies, server logs and other similar technologies.
  - **Third parties or publicly available sources.** We may receive personal data about you from various third parties and public sources as set out below:
    - certain Usage Data from the following parties:
      - (a) analytics providers; and
      - (b) search information providers.
    - Identity and Contact Data from publicly available sources.

#### 4. How we use your personal data

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

- Where we need to perform our contractual obligations to you.
- 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 we need to comply with a legal or regulatory obligation.

**Legitimate Interest** means the interest of conducting and managing our business to enable us to give you the services/products and a good and secure experience. We consider and balance any potential impact on you (both positive and negative) and your rights before we process your personal data for our legitimate interests. We do not use your personal data for activities where our interests are overridden by the impact on you (unless we have your consent or are otherwise required or permitted to by law). Please contact us if you would like any further guidance concerning how we assess legitimate interests against any potential impact on you.

Generally we do not rely on consent as a legal basis for processing your personal data other than in relation to sending third party direct marketing communications to you via email or text message. You have the right to withdraw consent to marketing at any time by [contacting us at support@precursive.com](mailto:support@precursive.com).

**Purposes for which we will use your personal data**

We have set out below, in a table format, a description of all the ways we plan to use your personal data, and legal bases we rely on in doing so. We have also identified what our legitimate interests are where appropriate.

Purpose/Activity	Type of data	Lawful basis for processing including basis of legitimate interest
To register you as a customer	(a) Identity (b) Contact	Performance of a contract with you
To process and deliver goods or services to you including: (a) Manage payments, fees and charges (b) Collect and recover money owed to us	(a) Identity (b) Contact (c) Marketing and Communications	(a) Performance of a contract with you (b) Necessary for our legitimate interests (to recover debts due to us)
To manage our relationship with you which will include (but is not limited to): (a) Notifying you about changes to our terms or privacy policy (b) Asking you to leave a review or take a survey (c) Dealing with enquiries and complaints made by or about you relating to the Site	(a) Identity (b) Contact (c) Marketing and Communications	(a) Performance of a contract with you (b) Necessary to comply with a legal obligation (c) Necessary for our legitimate interests (to keep our records updated and to study how customers use our products/services)

<p>To enable you to partake in a prize draw, competition or complete a survey</p>	<p>(a) Identity (b) Contact (c) Usage (d) Marketing and Communications</p>	<p>(a) Performance of a contract with you  (b) Necessary for our legitimate interests (to study how customers use our products/services, to develop them and grow our business)</p>
<p>To administer and protect our business, our Site and our Platform (including troubleshooting, data)</p>	<p>(a) Identity (b) Contact</p>	<p>(a) Necessary for our legitimate interests (for running our business)</p>
<p>To perform analysis, testing, system maintenance, support, reporting and hosting of data</p>	<p>(a) Usage</p>	<p>(a) Necessary for our legitimate interests (the provision of administration and IT services, network security, to prevent fraud and would be required in the context of a business reorganisation or group restructuring exercise)  (b) Necessary to comply with a legal obligation</p>
<p>To deliver relevant website content and advertisements to you and measure or understand the effectiveness of the advertising we serve to you</p>	<p>(a) Identity (b) Contact (c) Usage (d) Marketing and Communications</p>	<p>Necessary for our legitimate interests (to study how customers use our products/services, to develop them, to grow our business and to inform our marketing strategy)</p>

<p>To use data analytics to improve our Site, Platform, products/services, marketing, customer relationships and experiences</p>	<p>(a) Identity (b) Usage</p>	<p>Necessary for our legitimate interests (to define types of customers for our products and services, to keep our website updated and relevant, to develop our business and to inform our marketing strategy)</p>
<p>To make suggestions and recommendations to you about goods or services that may be of interest to you</p>	<p>(a) Identity (b) Contact (c) Usage (d) Marketing and Communications</p>	<p>Necessary for our legitimate interests (to develop our products/services and grow our business)</p>

## Marketing

We strive to provide you with choices regarding certain personal data uses, particularly around marketing and advertising. We have established the following personal data control mechanisms regarding our marketing activities:

- *Promotional offers from us*

We may use your Identity, Contact and Usage Data to decide what we think you may want or need, or what may be of interest to you.

You will receive marketing communications from us if you have requested information from us or purchased goods or services from us or if you provided us with your details when you entered a competition or registered for a promotion and, in each case, you have not opted out of receiving that marketing.

- *Opting out*

You can ask us to stop sending you marketing messages at any time by following the opt out links on any marketing message sent to you or by contacting us at [support@precursive.com](mailto:support@precursive.com) at any time.

## **Cookies**

You can set your browser to refuse all or some browser cookies, or to alert you when websites use cookies. If you disable or refuse cookies, you may be unable to use some parts of our Site and/or our Platform properly or at all.

## **Change of purpose**

We will only use your personal data for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose.

If we need to use your personal data for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

Please note that we may process your personal data without your knowledge or consent, where this is required or permitted by law.

## **5. Disclosures of your personal data**

We may have to share your personal data with the parties set out below for the purposes set out in the table in paragraph 4 above.

- Internal third parties – i.e. other companies within our group of companies and who provide support or development services to you under the terms of our contract with your company.
- The following external third parties:
  - Suppliers, partners and providers which we use to help deliver our services (including without limitation those set out in the table at the end of this section 5).
  - Professional advisers including lawyers, bankers, auditors and insurers who provide consultancy, banking, legal, insurance and accounting services.
  - HM Revenue & Customs, regulators and other authorities .
- Third parties to whom we may choose to sell, transfer, or merge parts of our business or our assets. Alternatively, we may seek to acquire other businesses or merge with them. If a change happens to our business, then the new owners may use your personal data in the same way as set out in this privacy notice.

We require all third parties to respect the security of your personal data and to treat it in accordance with the law. We do not allow our third-party service providers to use your personal data for their own purposes and only permit them to process your personal data for specified purposes and in accordance with our instructions.



Supplier Name	Supplier Website	Data Category	Purpose
Subscriber Salesforce Instance	<a href="https://www.salesforce.com/">https://www.salesforce.com/</a>	Product Data	Product application infrastructure.
Precursive Salesforce Instance	<a href="https://www.salesforce.com/">https://www.salesforce.com/</a>	Company confidential and Employee Personal Data	CRM Software, Knowledgebase, Community, Customer Support, License Management, and other business processes.
Intercom	<a href="https://www.intercom.com/">https://www.intercom.com/</a>	Company confidential and Employee Personal Data, Individual Product Usage Data	In-app support, communication and app analytics.
Xero	<a href="https://www.xero.com/">https://www.xero.com/</a>	Company confidential and Employee Personal Data	Accounting and invoicing
Breadwinner	<a href="https://breadwinner.com/">https://breadwinner.com/</a>	Company confidential and Employee Personal Data	Accounting and invoicing
Stripe	<a href="https://stripe.com/">https://stripe.com/</a>	Company confidential and Employee Personal Data	Credit card payment processing
RingCentral	<a href="https://www.ringcentral.co.uk/">https://www.ringcentral.co.uk/</a>	Company confidential and Employee Personal Data	Cloud telephone service
Google Apps	<a href="https://gsuite.google.com/">https://gsuite.google.com/</a>	Company confidential and Employee Personal Data	Documents and file storage, Email, Calendar and other productivity tools
MailChimp	<a href="https://mailchimp.com/">https://mailchimp.com/</a>	Company confidential and Employee Personal Data	Marketing communications
Zendesk	<a href="https://www.zendesk.com/">https://www.zendesk.com/</a>	Company confidential and Employee Personal Data	Knowledge Base and Case Management
Zoom	<a href="https://zoom.us">https://zoom.us</a>	Company confidential and Employee Personal Data	Web conferencing and Webinars including recordings and registrations
PandaDoc	<a href="https://www.pandadoc.com/">https://www.pandadoc.com/</a>	Company confidential and Employee Personal Data	E-signature
YouCanBookMe	<a href="https://youcanbook.me/">https://youcanbook.me/</a>	Company confidential and Employee Personal Data	Form collection and meeting scheduling
MailParser	<a href="https://mailparser.io/">https://mailparser.io/</a>	Company confidential and Employee	Email parsing/extraction software and services; used to integrate webforms and

		Personal Data	Salesforce
Wix	<a href="https://wix.com/">https://wix.com/</a>	Company confidential and Employee Personal Data	Web hosting and form collection
Webflow	<a href="https://webflow.com/">https://webflow.com/</a>	Company confidential and Employee Personal Data	Web hosting and form collection
GetFeedback	<a href="https://www.getfeedback.com/">https://www.getfeedback.com/</a>	Company confidential and Employee Personal Data	Marketing Surveys
Bugsnag	<a href="https://www.bugsnag.com/">https://www.bugsnag.com/</a>	Anonymous Product Usage Data	Product analytics
Leadfeeder	<a href="https://www.leadfeeder.com/">https://www.leadfeeder.com/</a>	Company confidential and Employee Personal Data	Web analytics
Google Analytics	<a href="https://analytics.google.com/analytics/web/">https://analytics.google.com/analytics/web/</a>	Anonymous Product Usage Data	Web and product analytics
Chili Piper	<a href="https://www.chilipiper.com/">https://www.chilipiper.com/</a>	Company confidential and Employee Personal Data	Meeting Scheduling
Cirrus Insights	<a href="https://www.cirrusinsight.com/">https://www.cirrusinsight.com/</a>	Company confidential and Employee Personal Data	E-mail Tracking
ZeroBounce	<a href="https://www.zerobounce.net/">https://www.zerobounce.net/</a>	Company confidential and Employee Personal Data	E-mail Validation
Hubspot	<a href="https://www.hubspot.com/">https://www.hubspot.com/</a>	Company confidential and Employee Personal Data	Inbound Marketing
Drift	<a href="https://www.drift.com/">https://www.drift.com/</a>	Company confidential and Employee Personal Data	Marketing communications
Outplay HQ	<a href="https://outplayhq.com/">https://outplayhq.com/</a>	Company confidential and Employee Personal Data	Sales prospecting
Seamless.AI	<a href="https://www.seamless.ai/">https://www.seamless.ai/</a>	Company confidential and Employee Personal Data	Sales prospecting
Lusha	<a href="https://www.lusha.com/">https://www.lusha.com/</a>	Company confidential and Employee Personal Data	Sales prospecting

## 6. International transfers

Our technology platform provider, Salesforce, is based outside the United Kingdom (**UK**) and European Economic Area (**EEA**) so their processing of your personal data may involve a transfer of data outside the UK and the EEA.

Whenever we transfer your personal data out of the UK and the EEA, we ensure a similar degree of protection is afforded to it by ensuring at least one of the following safeguards is implemented:

- We will only transfer your personal data to countries that have been deemed to provide an adequate level of protection for personal data. For further details, see [\*European Commission: Adequacy of the protection of personal data in non-EU countries\*](#).
- Where we use certain service providers, we may use specific contracts approved for use in the UK which give personal data the same protection it has in the UK.

Please [\*contact us\*](#) if you want further information on the specific mechanism used by us when transferring your personal data out of the UK and the EEA.

Where you are solely a U.S. resident, we will store your personal data within the U.S. but we may process such data within the EEA and/or the UK.

## 7. 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 and are ISO/IEC 27001 certified (the most widely recognised international standard for information security). ISO 27001 certification demonstrates that we have a robust security program, with rigorous management activity and technical controls in place to meet the confidentiality, integrity, and availability principles of information security.

In addition, we limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process your personal data on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected personal data breach and will notify you and any applicable regulator of a breach where we are legally required to do so.

## 8. Data retention

### **How long will you use my personal data for?**

We will only retain your personal data for as long as necessary to fulfil the purposes we

collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal requirements.

In some circumstances we may anonymise your personal data (so that it can no longer be associated with you) for research or statistical purposes in which case we may use this information indefinitely without further notice to you.

## 9. Your legal rights

**Under certain circumstances, you have rights under data protection laws in relation to your personal data.**

You have the right to:

- **Request access** to your personal data (commonly known as a "data subject access request"). This enables you to receive a copy of the personal data we hold about you and to check that we are lawfully processing it.
- **Request correction** of the personal data that we hold about you. This enables you to have any incomplete or inaccurate data we hold about you corrected, though we may need to verify the accuracy of the new data you provide to us.
- **Request erasure** of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase your personal data to comply with local law. Note, however, that we may not always be able to comply with your request of erasure for specific legal reasons which will be notified to you, if applicable, at the time of your request.
- **Object to processing** of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing your personal data for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information

which override your rights and freedoms.

- **Request restriction of processing** of your personal data. This enables you to ask us to suspend the processing of your personal data in the following scenarios: (a) if you want us to establish the data's accuracy; (b) where our use of the data is unlawful but you do not want us to erase it; (c) where you need us to hold the data even if we no longer require it as you need it to establish, exercise or defend legal claims; or (d) you have objected to our use of your data but we need to verify whether we have overriding legitimate grounds to use it.
- **Request the transfer** of your personal data to you or to a third party. We will provide to you, or a third party you have chosen, your personal data in a structured, commonly used, machine-readable format. Note that this right only applies to automated information which you initially provided consent for us to use or where we used the information to perform a contract with you.
- **Withdraw consent at any time** where we are relying on consent to process your personal data. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to provide certain products or services to you. We will advise you if this is the case at the time you withdraw your consent.

If you wish to exercise any of the rights set out above, please contact us at [support@precursive.com](mailto:support@precursive.com).

### **No fee usually required**

You will not have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee if your request is clearly unfounded, repetitive or excessive. Alternatively, we may refuse to comply with your request in these circumstances.

### **What we may need from you**

We may need to request specific information from you to help us confirm your identity and ensure your right to access your personal data (or to exercise any of your other rights). This is a security measure to ensure that personal data is not disclosed to any person who has no right to receive it. We may also contact you to ask you for further information in relation to your request to speed up our response.

### **Time limit to respond**

We try to respond to all legitimate requests within one month. Occasionally it may take us longer than a month if your request is particularly complex or you have made a number of requests. In this case, we will notify you and keep you updated.