

Insightfully Done privacy notice

This privacy notice tells you what to expect us to do with your personal information.

Our contact details

Email vicki@insightfullydone.com, helen@insightfullydone.com

What information we collect, use, and why

We collect or use the following information to **provide services and goods, including delivery**:

- Names and contact details
- Addresses
- Payment details (including card or bank information for transfers and direct debits)
- Purchase or account history
- Photographs or video recordings
- Call recordings
- Records of meetings and decisions

We collect or use the following information for **service updates or marketing purposes**:

- Names and contact details

We collect or use the following information for **research or archiving purposes**:

- Names and contact details
- Location data
- Recorded images, such as photos or videos
- Call recordings
- Personal information used for administration of research

- Personal information used for the purpose of research
- Records of consent, where appropriate
- Payment details (including card or bank information for transfers and direct debits)

Lawful bases

Our lawful bases for collecting or using personal information to **provide services and goods** are:

- Consent
- Contract

Our lawful bases for collecting or using personal information for **service updates or marketing purposes** are:

- Legitimate interest:
 - o Our primary purpose in contacting prospective customers via individual emails is to establish meaningful connections and provide relevant information about our services that we believe may be of interest to them.
 - o We aim to initiate personalised communication to foster mutually beneficial relationships and explore potential business opportunities.
 - o Before reaching out to prospective clients we conduct a thorough assessment to ensure that our legitimate interests align with the expectations and rights of the individuals. We consider factors such as the relevance of our products/services to the recipient, the potential for a professional relationship, and the minimisation of any impact on their privacy rights.
 - o We carefully balance our legitimate interests against the rights and freedoms of the individuals to ensure that our outreach efforts are not unduly intrusive or unwanted.
 - o We implement appropriate technical and organisational measures to safeguard the personal data obtained through individual email outreach. This includes measures to prevent unauthorised access, accidental loss, or disclosure of information.
 - o As a recipient of our communications, you have the right to object to the processing of your personal data based on

legitimate interests. You can exercise this right by contacting us using the information provided in this privacy policy

Our lawful bases for collecting or using personal information for **research or archiving purposes** are:

- Consent
- Contract
- Legitimate interest:
 - o Purpose of Data Collection and Use: Our primary purpose in collecting and using personal information for research services is to conduct valuable research studies and analysis that contribute to the advancement of knowledge and innovation in our field. We aim to gather insights, opinions, and feedback from individuals to inform our research projects and improve the quality of our services.
 - o Assessment of Legitimate Interest: Before collecting or using personal information for research purposes, we conduct a thorough assessment to ensure that our legitimate interests align with the expectations and rights of the individuals. We consider factors such as the relevance of the research topic, the potential benefits, and the minimisation of any impact on individuals' privacy rights.
 - o Balancing Test: We carefully balance our legitimate interests in conducting research with the rights and freedoms of the individuals whose personal information we collect or use. We take steps to mitigate any potential risks or adverse effects on privacy, such as anonymising or pseudonymising data whenever feasible and implementing appropriate data protection measures.
 - o Data Protection Measures: We implement robust technical and organisational measures to protect the confidentiality, integrity, and security of the personal information collected or used for research purposes. This includes measures to prevent unauthorised access, unauthorised disclosure, or accidental loss of information.
 - o Your Rights: As a participant in our research studies, you have the right to be informed about how your personal information will be used, and you have the right to object to the processing of your personal data based on legitimate interests. You can exercise these rights by contacting us using the information provided in this privacy policy.

Where we get personal information from

- People directly
- Publicly available sources
- Third parties such as research firms (e.g. survey recruitment firms) and clients
- We may automatically collect certain data from you as you use our website by using cookies and similar technologies. We use cookies for important reasons such as: to provide a good experience for site visitors, to monitor and analyze the effectiveness and performance of our website, to ensure our website is secure and safe to use.

How long we keep information

Personal information in a message is securely stored in an email system (for which Google is the data controller) and retained for an appropriate amount of time having regard to the purpose of the message. After that time it will be securely deleted.

Personal information obtained to provide services is retained for as long as necessary to fulfill our contractual and legal obligations and to maintain an ongoing relationship where relevant.

Personal information obtained for research purposes will be retained for an appropriate amount of time having regard to the completion of the research project. Once we no longer need personal data for the purposes of the research project, it will be securely deleted or anonymised.

Who we share information with

We may share personal information obtained from you for research purposes with other relevant third parties, namely our clients. We would only do this in an anonymised way or with your consent.

Sharing information outside the UK

Where necessary, we may transfer personal information outside of the UK. When doing so, we comply with the UK GDPR, making sure appropriate safeguards are in place. Please contact us for more information.

Your data protection rights

Under data protection law, you have rights including:

Your right of access - You have the right to ask us for copies of your personal data.

Your right to rectification - You have the right to ask us to rectify personal data you think is inaccurate. You also have the right to ask us to complete information you think is incomplete.

Your right to erasure - You have the right to ask us to erase your personal data in certain circumstances.

Your right to restriction of processing - You have the right to ask us to restrict the processing of your personal data in certain circumstances.

Your right to object to processing - You have the right to object to the processing of your personal data in certain circumstances.

Your right to data portability - You have the right to ask that we transfer the personal data you gave us to another organisation, or to you, in certain circumstances.

Your right to withdraw consent – When we use consent as our lawful basis you have the right to withdraw your consent.

You don't usually need to pay a fee to exercise your rights. If you make a request, we have one calendar month to respond to you.

To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

How to complain

If you have any concerns about our use of your personal data, you can make a complaint to us using the contact details at the top of this privacy notice.

If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO.

The ICO's address:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>

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