



WICKENSTONES

Privacy notice to clients

Wickenstones collects personal data about individuals who work at organisations we currently work with or aim to work with in the future. This notice will refer to these individuals collectively as clients.

This notice gives information about how your data are processed. You can find further information on Wickenstones' data protection policy on our web site.

The person responsible for these data, and for ensuring that all processes in this privacy notice are followed, is the office manager, who can be contacted at sarah@wickenstones.com.

The data we collect and how we collect them

The data we hold may include your name, work email address, phone number, job title, department, organisation and place of work. We have collected this information either from the public domain (e.g. from your employer's web site or LinkedIn) or from working with you in the past.

Why we collect/store data

We collect data about you to enable us to work with you on projects. Knowing how to contact you by phone or email is essential for working with you effectively. Knowing your job title and department helps us to understand your role in a project and decide how best to assist you.

Another reason we collect and store this information is to be able to maintain a relationship with you and explore opportunities for future projects. Under 'data processing' below, we explain what this entails.

Data storage

When working on a project with you, the project team will store your contact details in a secure Microsoft OneDrive or SharePoint file which is only accessible to that team. Once the project is over, the team will delete your contact details from their project files. Further copies of your name and email address may be retained in emails stored securely on Microsoft Outlook. Staff emails are securely

Registered office: Wickenstones, Chalkwood house, Cold Harbour, RG8 7SZ, UK

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archived after one year, after which they are only accessible to the CEO and office manager. Your client lead will retain your contact details on their own OneDrive which is only accessible to them. They will store this information for up to three years after the last time they work with you.

Your name and job title may be shared with the senior team as part of general updates on client relationships. There is one centralised copy of materials used for these updates which is saved on a Microsoft OneDrive file only accessible to the senior team and may be stored for up to ten years.

We have a customer relationship management (CRM) database which is hosted by Really Simple Systems Ltd. Really Simple Systems Ltd complies with GDPR and you can read their GDPR statement [here](#). All of the data we hold about you (name, job title, department, organisation, work email address and phone number) are stored on this database. Wickenstones has a secure, password-protected account to which only our head of global business development has access. We will ask for consent before adding anyone new to the CRM. This may be done verbally, for example when someone hands us a business card. You may ask us to remove your details from the CRM at any time. All emails we send from the CRM contain a link to do this, or alternatively you can email GDPR@wickenstones.co.uk. We continually update the data on our CRM database, including removing anyone who appears to no longer work at a client organisation from the database within three months.

Data processing

Project teams that you are working with will necessarily use your data to contact you by email or phone about the project.

The client lead assigned to your organisation will use your data to assess opportunities at your organisation, and to contact you about current projects, or possible future projects in which you have expressed an interest: for example, if you submit a request for proposal, the client lead may contact you for further discussion.

The head of global business development uses client data stored in the CRM database to make contact with potential clients by phone or email to introduce them to Wickenstones, and to send thought leadership articles by email up to four times a year to all our clients.

Third parties

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In addition to Really Simple Systems Ltd, mentioned above, we may share your data with the following third parties:

- Microsoft is a data processor for our client data because they provide storage and the functionality to sort, filter and share data internally. Microsoft adheres to the GDPR and their data protection policy can be accessed [here](#).
- Trello is a data processor for our client data because they provide storage and functionality to sort and share data internally. Trello stores data in the US, and adheres to the EU-U.S. Privacy Shield Principles. You can learn about how they protect your data [here](#).
- CTS is a data processor for our client data because they are our Internet Service Provider. CTS adheres to the GDPR and their privacy policy can be accessed by emailing support@cts-group.co.uk.

Right to erasure, access requests and objections to processing

You can read about your rights to erasure and access [here](#) and [here](#). If you wish to make a request under your right to access or right to erasure, please email GDPR@wickenstones.co.uk.