

Ideal Success Privacy Notice

General business

Ideal Success customer privacy notice

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

Contact details

Email: **Your@Ideal-Success.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
- Date of birth
- Payment details (including card or bank information for transfers and direct debits)
- Health information (including dietary requirements, allergies and health conditions)
- Health and safety information
- Website user information (including user journeys and cookie tracking)
- Photographs or video recordings
- Records of meetings and decisions
- Information relating to compliments or complaints



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

- Trade union membership
- Health information

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

- Names and contact details
- Addresses
- Marketing preferences
- Location data
- Recorded images, such as photos or videos
- Website and app user journey information
- Records of consent, where appropriate

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

- Trade union membership

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

- Names and contact details
- Addresses
- Location data
- Recorded images, such as photos or videos
- IP addresses
- Website and app user journey information
- Personal information used for administration of research
- Personal information used for the purpose of research
- Records of consent, where appropriate

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

- Trade union membership

Lawful bases

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

- Consent
- Contract
- Legal obligation
- Legitimate interest:
 - To make/and or stay or may contact the customer about similar products that they may have shown interest in or purchased.

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

- Consent
- Contract
- Legal obligation
- Legitimate interest:
 - To make/and or stay or may contact the customer about similar products that they may have shown interest in or purchased.

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

- Consent
- Contract
- Legal obligation
- Legitimate interest:
 - To make/and or stay or may contact the customer about similar products that they may have shown interest in or purchased.

Where we get personal information from

- People directly
- Schools, colleges, universities or other education organisations

How long we keep information

Ideal Success Retention Schedule

This schedule outlines the types of records maintained by Ideal Success Coaching, their retention periods, and disposal procedures.

1. Client Records

Record Type	Description	Retention Period	Disposal Method
Coaching Agreements	Signed agreements between Coach and Client	7 years	Shredding/Deletion
Session Notes	Notes taken during coaching sessions	7 years	Shredding/Deletion
Contact Information	Client contact details	7 years	Shredding/Deletion
Payment Records	Records of payments made by clients	7 years	Shredding/Deletion
Feedback and Surveys	Client feedback and completed surveys	3 years	Shredding/Deletion

2. Financial Records

Record Type	Description	Retention Period	Disposal Method
Invoices	Issued invoices to clients	7 years	Shredding/Deletion
Expense Receipts	Receipts for business expenses	7 years	Shredding/Deletion
Bank Statements	Monthly bank statements	7 years	Shredding/Deletion
Tax Records	Filed tax returns and supporting documents	7 years	Shredding/Deletion

3. Administrative Records

Record Type	Description	Retention Period	Disposal Method
Emails	Business-related email correspondence	3 years	Deletion
Policies and Procedures	Internal policies and procedures	Until superseded	Shredding/Deletion
Meeting Minutes	Minutes from internal and client meetings	5 years	Shredding/Deletion
Contracts with Vendors	Signed contracts with service providers and suppliers	7 years	Shredding/Deletion

4. Human Resources Records

Record Type	Description	Retention Period	Disposal Method
Employee Records	Employment contracts, performance reviews	7 years after leaving	Shredding/Deletion
Training Records	Records of training and professional development	7 years	Shredding/Deletion
Timesheets	Employee timesheets and attendance records	3 years	Shredding/Deletion

5. Marketing and Communications

Record Type	Description	Retention Period	Disposal Method
Advertising Materials	Copies of ads, brochures, and marketing campaigns	5 years	Shredding/Deletion
Social Media Content	Posts and content shared on social media platforms	3 years	Deletion
Website Content	Content published on the company website	3 years	Deletion

Ideal Success Disposal Procedures

1. Shredding:

- Paper records that have met their retention period should be securely shredded to protect confidential information.

2. Deletion:

- Electronic records should be deleted from all storage devices and backups to ensure they are no longer accessible.

Compliance and Review

1. Regular Review:

- The retention schedule should be reviewed annually to ensure compliance with legal requirements and business needs.

2. Compliance:

- All staff should be trained on the retention schedule and understand the importance of adhering to it to maintain compliance and protect sensitive information.

3. Updates:

- Any changes to legal requirements or business practices that affect record retention should be promptly updated in the retention schedule.

Who we share information with

Others we share personal information with

- Professional or legal advisors
- Professional consultants
- Publicly on our website, social media or other marketing and information media (where appropriate)

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>