Privacy Policy

How we collect, use, and protect personal data

Who we are

Planned Data Ltd. is a company registered in England and Wales, company number 16617913, with its registered office at C/O Kilvington Solicitors, Westmorland House, Market Square, Kirkby Stephen, Cumbria, CA17 4QT. We help leadership teams improve operational process performance and margins using the insights in their own data.

Contact for anything in this policy, including rights requests: Peter.Osborn@PlannedData.com.

What this policy covers

This policy explains how we collect, use, and protect personal data in accordance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018. It covers three things:

- **Visitors to planneddata.com** and people who contact us through it.
- **Enquiries and correspondence** with people who ask about our work.
- **Business contacts** at organisations we research and approach about their work, including approaches made through professional networks such as LinkedIn.

Where you deal with us through a third-party platform, that platform's own terms and privacy notice also apply.

What data we collect

From our website and enquiries: contact details such as name, email address, and telephone number submitted via forms; usage data including pages visited, time on site, and referral source, gathered through analytics cookies; and marketing preferences and interactions with marketing communications, where consent has been given.

From business contact research: your name, job title, employer, and professional profile address; what you have published professionally, such as profile summaries, posts, and comments; your professional history; and public information about your organisation, including filed accounts, corporate records, press coverage, and announcements.

We do not seek special category information, and we do not research anyone's private life.

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Where business contact information comes from

Company websites and press releases, Companies House, professional profiles that people have made public, trade and local press, and other public registers. We do not obtain it from data brokers, and we do not buy contact lists.

Purposes and lawful basis

We process personal data on the following legal bases:

- **Consent** for marketing communications and non-essential cookies.
- **Legitimate interests** for website analytics, for responding to enquiries, and for researching organisations and approaching the people who run them about work that may be relevant to them.
- **Legal obligation** where required for accounting and compliance records.

Our legitimate interests in business contact research are: identifying organisations that may need our help, addressing the message to the person whose remit it falls within, and keeping an accurate record of what was said. We limit ourselves to professional information the person has chosen to publish, we send a single individually written message rather than bulk mail, and the approach is easy to decline. We have recorded that assessment and review it.

Automated decisions

We may score organisations to decide who to approach first. That is prioritisation only. It does not produce legal or similarly significant effects, and no decision about an individual is made without a person reading the material.

Data sharing and international transfers

We share data with trusted third-parties that deliver services to us, including website hosting, analytics and management platforms. We do not sell personal data or share it for anyone else's purposes. Where any provider is located outside the UK, transfers are safeguarded using UK Standard Contractual Clauses or an equivalent adequacy mechanism.

Retention

Personal data is retained only as long as necessary for the purposes described above.

- Enquiry data is typically retained for up to 24 months.
- Financial records are retained for six years to meet statutory obligations.

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- Business contact research records are retained while the organisation remains under consideration and for up to 24 months after the last contact.
- Where someone objects or asks us to stop, we keep their name and the fact of the objection, and delete the rest.

Your rights

Under UK GDPR, you have the right to access, rectify, erase, restrict, or port your personal data, and to object to certain processing. You may also withdraw consent at any time. An objection to direct marketing is absolute: we stop. To exercise any of these rights, contact Peter.Osborn@PlannedData.com.

Cookies

We use essential cookies to make the site work, and analytics cookies to understand how it is used. Non-essential cookies are set only with your consent, which you can withdraw at any time through your browser or our cookie controls.

Complaints

If you have concerns about how we handle your data, please contact us in the first instance at Peter.Osborn@PlannedData.com. From 19 June 2026, an internal complaints process introduced under the Data (Use and Access) Act 2025 must be followed before referring unresolved complaints to the Information Commissioner's Office (ICO).

Changes to this policy

We review this policy at least annually and whenever our processing changes. The current version is always the one published on planneddata.com.

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