

Data Storage & Retention Policy



Together

We are **Clemark Group**,

Registered in England & Wales under **Associate Enterprises Limited** and including all wholly owned subsidiaries. We also trade as Assent, Lorators, Clemark.

Our integrated management system covers the provision of consultancy, auditing, training, creative, technology and other professional services delivered in-person and remotely to ensuring the quality of products/services and the security of all information.

1.0 Personal Data

Personal Data is handled and retained in line with our data protection arrangements.

Please See our Privacy Statement [Public]

2.0 Business Data

Data we keep relating to your organisation as set out in Annex A below.

Note: we do not retain paper documentation. Paperwork and postal mail is digitally scanned on to our system and originals are securely shredded immediately.

3.0 Storage of Data

We take care to store data securely and apply restricted role-based access rights.

Wherever possible, we designate that cloud services store data within the UK or EU.

4.0 Retention of Data

We will retain data for the duration of the contract and beyond, while we believe it is pertinent to the work carried out.

You may request that we erase the data we hold, and we will conduct this as below.

5.0 Data Access Request

Individuals have a right under data protection legislation to access the personal data we hold on them, and this right can be exercised following our Data Protection and Privacy arrangements. Please see our Privacy Statement.

An authorised representative of your organisation may also request a copy of any business data we hold and we will service all reasonable requests on the following basis:

- We will provide all data related to any contract with us only to someone of board level within your organisation.
- We will provide business data relating to a contract to an employee of the company who is recognised to us as having the right authority within in the context of the contract to access it.
- We will refer all queries to a board level representative of your organisation.

Annex 1 – Storage and Retention of Data

What Data	Why	Where	Retention
<ul style="list-style-type: none"> • Cookies 	See our Cookie Policy for Full Details.		
<ul style="list-style-type: none"> • Enquiries 	Legitimate Business Interest	<ul style="list-style-type: none"> • Freshdesk. • Microsoft 365. • Salesforce. 	7 Years
<ul style="list-style-type: none"> • Scoping Documents. • Contracts 	Service Provision under Contract.	<ul style="list-style-type: none"> • Google Workspace. • Adobe Signature. 	7 Years
<ul style="list-style-type: none"> • POs. • Invoices. • Financial Docs. 	Service Provision under Contract.	<ul style="list-style-type: none"> • Xero. 	7 Years
<ul style="list-style-type: none"> • Audit Reports. • Visit Notes. • Documentation from you. • Documentation produced by us. 	Service Provision under Contract.	<ul style="list-style-type: none"> • Microsoft 365. • Google Workspace. 	4 Years

Annex 2 – Sub Processors

Vendor	Purpose	Data Centres
Microsoft 365	Provides office software tools including email.	EU & UK
Google Workspace	Provides office software tools including storage and email.	EU
Freshworks	Provides service desk, chat and CRM Software tools.	EEA
Salesforce	Provides a CRM software tool,	EU
Xero	Provides Invoicing and Financial Software.	US
Basecamp	Provides a Project Management Tool.	US