STANDARD DATA PROCESSING SCHEDULE - MEMBERSHIP

- Product/service provided to member: Organisational Membership
- Product/service definition: Members will receive a blend of insight and knowledge about the latest customer service issues, that is relevant to their needs, including access to tools, training and practical solutions that will raise standards across their organisation.

Function	Purpose of processing	What is the processing/ collection/ storage of data that takes place?	Type of personal data	Why is this data being gathered/ processed?	Categories of data subject	Tech/org measures	Retention
Business Benchmarking Surveys	Conducting the business benchmarking survey for our members	Member uploads a database onto a secure portal	Customer name, email addresses, phone number	Needed for our 3rd party to conduct the survey i.e. sending email out, calling customers	Customers from our Member Organisations	Customer e-mail addresses will be transferred to The Leadership Factor via our web survey portal. The survey portal is only accessible via a secure HTTPS connection . Our server has been tested by Qualsys for the security of its HTTPS connection and is A-rated. No one in The Institute has access to this data un-anonymised only our third-party data processor TLF. Each individual survey is covered by an overarching data sharing agreement held by The Institute on behalf of our Members. TLF uses AWS servers based in UK/Ireland only.	Data automatically deleted from the portal after the surveys close. Personal data automatically deleted from TLF's severs 15 months after survey starts.
ServCheck Surveys	Conducting the ServCheck survey for our members	Member uploads a database onto a secure portal	Staff name, email addresses	Needed for the survey to be distributed to staff	Employees of our Member	Rackspace data storage which is 24/7 secure building.	When surveys close all email addresses are removed. Responses are anonymised
Engagement Plan, Implementation plans & ROI statement	Capturing membership activities and objectives Customer completes the application form – CDD acts as support and as a conduit of information into The Institute	Membership engagement and activity plan completion.	Name, job title, work email address, work telephone number for key personnel.	Necessary to liaise with contact regarding membership activities and maintain records	Employees of our Member	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	As per retention policy
Customer Focus magazine	Mailing magazine to members	Holding names and postal addresses in our CRM system for the purposes of sending hard copy magazine	Name, job title, company, address	Necessary to share member benefit of receiving magazine	Employees of our Member	CRM system is password and MFA protected	As per retention policy

Member electronic communications	Sending a monthly newsletter to members and latest updates on products/services e.g. Conference/NCSW	Uploading of data from CRM to create individual distribution lists on Hubspot. Stored on Hubspot indefinitely for purposes of reporting.	Name and email address for mail merged e-shots, email addresses only for generic communications	To provide members with the latest information – as promised at the point of taking up membership	Individual members, individuals in member organisations including lead contacts from organisational members and people who have manually subscribed via the website	CRM and Hubspot are password and MFA protected	As per retention policy
Event organisation	Event organisation and delegate management	Self-service by delegates registering Personalised emails from or on behalf of The Institute CEO to external stakeholders and members	First name, surname, telephone, nominated email address, dietary and accessibility requirements, and name of organisation of delegates. In addition, for paid for events we collect organisation address, VAT number (for invoices) or card details (for payment)	To enable awareness of and attendance at events, payment for those which are paid for, create delegate badges, dietary and accessibility requirements catered for, and sharing of any post event content.	Individual attendees	CRM system is password and MFA protected	As per retention policy
Allocated Individual Membership (as part of Organisational Membership)	Online Virtual Learning Environment	Individual member information used to create their account	Name and email addresses of individual member	To create member account	Individual members	Password access to individual accounts Secure server storage of user data	Individual user accounts will be deactivated no sooner than 3 months after the end of Membership and no later than As per retention policy
	Certificates	Member information is used to allow certificate production	Name and email addresses of attendees	Needed for the certificate creation following online training	Individual members	Password access individual accounts Secure server storage of user data	

ADDITIONAL DATA PROCESSING SCHEDULE - SERVICEMARK ASSESSMENT

- Product/service provided to member: ServiceMark Accreditation

- Product/service definition: ServiceMark is awarded based on customer satisfaction feedback and an assessment of employee engagement with your organisation's customer service strategy. It helps organisations understand how effective their customer service strategy is, and identifies areas for improvement.

Function	Purpose of processing	What is the processing/ collection/ storage of data that takes place?	Type of personal data	Why is this data being gathered/ processed?	Categories of data subject	Tech/org measures	Retention
ServiceMark assessment	Preparation for assessment visit	Application for assessment form processing	Contact name, job title, email address, telephone number, mobile number	To start process of assessment	Lead contact for organisation	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Held for as long as the individual uses the services of The Institute plus 6 years.
		Liaison with key contacts	Emails and phone calls	To organise assessment dates, agree approach and understand company structure.	Individual contact details	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Data deleted 60 days after the assessment is complete unless held in association with for other products and services
		PO number and invoicing details	Name, email address and telephone number	To raise invoicing charge on CRM and email Accounts	Individual contact details	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	
	Assessment visit	Note taking, relating to interviews and observations conducted. Hard copy and electronic documents obtained	Organisation chart, name, job title, length of service, manager, department, team and site.	To determine eligibility for award of ServiceMark Accreditation.	Individual contact details	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	
	Communication of assessment outcome &	Email and assessment report	Email address Contacts names	To keep a record of the assessment report	Individual contact details	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	

ADDITIONAL DATA PROCESSING SCHEDULE – MEMBER TRAINING PROGRAMMES
- Product/service provided to member: People development offering including the ServiceFocus suite, Management Qualification and Professional Qualifications
- Product/service definition: The Institute offers a range of products, services and information to support development of individuals and improving the skills and abilities of customer service professionals in the UK. Organisational Members may access these on a discounted basis.

Function	Purpose of processing	What is the processing/ collection/ storage of data that takes place?	Type of personal data	Why is this data being gathered/ processed?	Categories of data subject	Tech/org measures	Retention
Management Qualification	Certificate production	Practitioner personal information is used to allow certificate production	Name and email addresses and/or home address of registering Practitioner	Needed for the certificate creation and delivery	Practitioner	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	As per retention policy – awards held indefinitely
	Venue booking	Send Practitioner details to venue to confirm booking and create delegate's list	Name, Surname, email address	To confirm the venue booking	Practitioner	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Third parties required to hand back upon completion of programme
	Cohort briefing	Send the list of Practitioner to the Tutors so they can introduce themselves	Name, Surname, email address, Phone	To give the tutors all required information for them to contact attendees	Practitioner	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Third parties required to hand back upon completion of programme
	Registration	To create the cohort	Practitioners details, the date application received and the contact details	To register the Practitioner	N/A	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	As per retention policy
ServiceFocus suite	Certificates	Attendee information is uploaded to allow certificate production	Name and email and/or home address addresses of attendees	Needed for the certificate creation	Attendees	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	As per retention policy – awards information held indefinitely
	Preparation for training delivery	Application for training delivery	Contact name, job title, email address, telephone number, mobile number	To start process of organising training delivery	None	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Held for as long as the individual uses the services of The Institute plus 6 years.
		Liaison with contact	Emails and phone numbers and location addresses	To organise training delivery & delivery dates	None	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected. folder	Held for as long as the individual uses the services of The Institute plus 6 years.

		Delegate spreadsheet	Delegate names, job titles, email addresses, postal addresses and telephone numbers	To order workbooks, issue joining instructions including pre attendance work	Participants	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Held for as long as the individual uses the services of The Institute plus 6 years.
		PO number and invoicing details	Name, email address and telephone number	To raise invoicing charge on CRM and email Accounts	Lead contact	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Held for as long as the individual uses the services of The Institute plus 6 years.
		Liaison with contact	Emails and phone calls	To gather organisational information to customise course content	Lead contact	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Deleted upon completion of task
	Post training delivery admin	Delegate completion spreadsheet	Delegate names, job titles, email addresses, postal addresses, telephone numbers, attendance dates	To issue completion certificates and individual memberships and update memberships on VLE	None	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Held for as long as the individual uses the services of The Institute plus 6 years.
		Service Improvement Opportunities/assignments	Delegate name & organisation, optional job title	To mark improvements / assignments	Participants	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Held for as long as the individual uses the services of The Institute plus 6 years.
		Communication of assignment decisions	Delegate and contact name	To communicate assignment decisions	Participants	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Held for as long as the individual uses the services of The Institute plus 6 years.
Professional Qualifications	Certificates	Attendee information is uploaded to allow certificate production	Name and email addresses of attendees	Needed for the certificate creation	Attendees	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	As per retention policy – awards held indefinitely
	Online Virtual Learning Environment	Attendee information is used to create their account	Name, phone number, location and email address of attendee	Account creation	Attendees	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Password for each account. Accounts closed no sooner than 3 months and no later than 12 months after the Membership period.
	Coaching	Attendee's coach will have access to personal data on the VLE	Name and email addresses of attendees	To get in touch with the attendee in order to support them	Attendee	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Coach has secure login and can only access details which relate to their allocated attendee

		Accreditation of trainee assessors for professional qualifications.	Reviewing homework assignments following the Assessor Development Workshop. (ADW)	Name and email address of trainee assessor.	Necessary to liaise with trainee assessor to provide guidance on proceeding with the accreditation.	Trainee assessor	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Personal data will be held for as long as the individual uses the services of The Institute plus 6 years.
			Reviewing an audio taped mock assessment with the assessor and qualification practitioner.	Name, email address and telephone number of trainee assessor. Name of qualification practitioner mentioned on audio recording.	To provide development feedback and agree actions towards sign-off and accreditation. To simulate a full assessment, a practitioner has opted-in to a mock assessment and has agreed that it can be recorded for training purposes.	Trainee assessor and practitioner being assessed	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Personal data will be held for as long as the individual uses the services of The Institute plus 6 years.
			Interview with an Assessor for Assessor Newsletter	Name, photograph, company and job title.	To engage assessors for training and promotion purposes.	Assessor	Information stored securely on Institute servers and CRM software behind MFA. Computers are password protected.	Personal data will be held for as long as the individual uses the services of The Institute plus 6 years.