Platform & Survey Data Notice

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This notice explains how Business Ingenuity, Inc. handles personal data. It covers **visitors to businessingenuityinc.com** and people who use our contact form, and the **Edgy platform**: the accounts, purchases, reports, surveys, Expert Sessions and tools that Business Ingenuity, Inc. provides to business customers. It also covers the **people who answer our customers' surveys**. It replaces our earlier website Privacy Policy.

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1. Our role

- **Account, purchase and support data:** we decide how this is used. We are its controller.
- **Survey responses:** we collect and analyse these on behalf of the customer organization that runs the survey. That organization decides to survey its people and what to ask. For survey data, we act as its service provider (processor) under its instructions and our Terms of Service.

2. What we collect

From account holders and buyers

- **Account details:** name, email address, password (stored only as a secure hash), and two-factor authentication settings if you turn them on.
- **Company details:** company name, website, sector and locations, and any additional context you give us for a report, which we use to prepare your reports.
- **Purchase records:** the product, price, date, receipt, and the phone number you give at checkout. Card payments are made on Stripe's hosted checkout. Stripe processes your card details, and we do not receive or store full card numbers.
- **Expert Session requests:** your preferred date, time and time zone, the focus and audience of the session, any notes you add, and your phone number, so we can schedule with you.
- **Acceptance records:** a record of your acceptance of our terms, including the date and time, the document versions you accepted, and your IP address and browser type.
- **Usage and security records:** sign-in events, actions taken in the workspace, and technical logs, used for security, support and troubleshooting.
- **Cookies:** the platform uses a strictly necessary session cookie to keep you signed in. We do not use advertising or cross-site tracking cookies.

From survey respondents

- **Survey answers**, and any demographic answers the customer chooses to ask for, such as location, department, role or tenure.
- We do **not** ask respondents for their name or email address in order to answer.
- To prevent abuse, such as the same device submitting many times, we store a **one-way hash of the respondent's IP address**, not the address itself.
- Customers may also upload survey results they have collected elsewhere, for example as a CSV export, for us to analyse.

From website visitors

- **Contact form:** your name, email address, company, subject and message. The form is processed by Web3Forms, which delivers it to our team inbox.
- **Analytics:** the website uses cookieless analytics to understand aggregate traffic, such as page views, referring sites and approximate visitor counts. Aggregate visit data is recorded on our own servers, and we use Cloudflare Web Analytics, a cookieless service, to view summary statistics. We do not set advertising or tracking cookies, build a profile of you, or track you across other websites.

Research inputs

Research reports are prepared from publicly available information about the organizations analysed, such as news, company websites, public filings and market data. They are not prepared from personal data about individuals. Public sources can still name people, for example executives, and those names may appear in a report.

3. How we use it

- to create and secure your account, and to deliver the products you buy, including generating, storing and delivering reports;
- to schedule and run Expert Sessions;
- to process payments and keep financial records;
- to send service emails, for example “your report is ready”, receipts and scheduling messages;
- to provide support, prevent abuse and keep the platform secure;
- to meet legal obligations.

We do not sell personal data, and we do not use survey responses for advertising. We may also use survey results in de-identified, aggregated form, from which no organization or individual can be identified, to build benchmarks and improve our methodology.

4. AI processing

Reports are generated by AI models. To produce them, we send the relevant information to our AI model provider for processing: your company details, research gathered from public sources and, for survey-based products, survey results. For survey-based products we send aggregated survey metrics, not individual responses. Our AI model provider’s commercial terms do not allow it to train its models on the information we send or the output it returns, and it keeps that information for up to 30 days, unless it must keep it longer to enforce its usage policy or to comply with the law.

5. Who we share it with

We share personal data only with service providers that help us run the Services, and only as far as they need it:

- **Render**: application hosting and database
- **Stripe**: payment processing

- **Anthropic**: AI model provider used to generate reports
- **Resend**: transactional email
- **Zoom**: video sessions for Expert Sessions
- **Public research and data providers** (Exa, Financial Modeling Prep and SEC EDGAR): we send them search queries about the organizations being analysed, not customer personal data
- **Cloudflare Web Analytics** and **Web3Forms**: website analytics and the contact form, as described in section 2
- **Google Fonts** and public code libraries (**jsDelivr**, **unpkg** and **cdnjs**): fonts and page code loaded by your browser, which receive your IP address as part of the request

We may also disclose data if the law requires it, to protect our rights, or as part of a merger or sale of our business.

6. Survey confidentiality

- Results are reported to the customer organization in aggregate.
- We do not give the customer a list linking named individuals to their answers, and respondents are not asked for their names.
- Groups of fewer than 3 respondents are not shown separately in breakdowns. Small groups can still make individuals easier to identify, so we ask customers to choose breakdowns with care.
- The customer can export its own survey data from the platform. Once exported, the customer is responsible for handling that data.

7. Retention

- Account and report data: kept while your account is open, and then for 3 years.
- Survey responses: kept for 3 years after the survey closes. Customers can ask us to delete their survey responses once their report has been delivered.
- Purchase and receipt records: kept for as long as tax and accounting law requires, currently 7 years.
- Security and activity logs: kept for 1 year.
- Contact-form messages: kept in our inbox as ordinary business correspondence. Email us and we will delete yours.

8. Security

We protect data with measures including encrypted connections (HTTPS), hashed passwords, optional two-factor authentication, and access controls that separate each customer's workspace. No system is perfectly secure. If we become aware of a breach that affects your data, we will notify you as the law requires.

9. Where data is processed

Our service providers may process data in the United States and other countries. Our application and database are hosted in the United States.

10. Your choices and rights

Depending on where you live, you may have the right to access, correct, delete or export your personal data, or to object to or restrict how it is used. **Account holders** can make these requests to us directly. **Survey respondents** should first contact the organization that ran the survey. Because we do not collect respondents' names, we usually cannot identify an individual's answers ourselves, but we will help the organization respond.

California residents

If you are a California resident, the California Consumer Privacy Act, as amended by the California Privacy Rights Act, gives you these rights over personal information we hold about you as a business:

- **To know** what personal information we collect, use and disclose, and to receive a copy of it.
- **To delete** personal information we collected from you, subject to legal exceptions.
- **To correct** inaccurate personal information.
- **To opt out of the sale or sharing** of personal information. We do not sell personal information, and we do not share it for cross-context behavioral advertising.
- **To limit the use of sensitive personal information.** We do not use sensitive personal information for purposes that would give rise to this right.
- **Not to be discriminated against** for exercising any of these rights.

The categories of personal information we collect, where they come from, why we use them and who receives them are set out in sections 2 to 5 of this notice, and how long we keep them in section 7. We have not sold or shared personal information in the past 12 months.

To make a request, email synergymatters@businessingenuityinc.com%3A%0AAccount%20email%3A%0ADetails%3A%0A%0A). We will verify your request by matching it to the information we hold, which usually means replying from your account email address. You may use an authorized agent, who must show written permission to act for you. For survey responses, we act as a service provider to the organization that ran the survey, so we will pass your request to it and help it respond.

California "Shine the Light": we do not disclose personal information to third parties for their own direct marketing.

11. Children

The Services are for businesses and are not directed to children under 18. We do not knowingly collect their data.

12. Changes

We will post any changes to this notice on this page and update the date above. We will tell account holders about material changes.

13. Contact

Questions and requests about platform or survey data can be sent to synergymatters@businessingenuityinc.com%3A%0AMy%20request%3A%0A%0A).