

Privacy Policy

Last Updated: 11th March 2026

This Privacy Policy explains how Precursive Ltd and its subsidiaries (including Precursive Inc, the Services Delivery Alliance, or SDA) collect, use, and protect your personal data. It applies to visitors of our websites, users of our products and services ("Services"), and participants in our professional services community.

1. Scope of this Policy

This Policy applies to:

- Visitors to our websites, including www.precursive.com and www.servicesdeliveryalliance.com
- Customers using the Precursive Services
- Participants in SDA-hosted events, webinars, and online communities

2. Who We Are

Precursive is a provider of professional services automation software and operates the Services Delivery Alliance (SDA), a community of professional services leaders. For the purposes of this Policy, 'we', 'us', or 'our' refers to Precursive Ltd, Precursive Inc., and affiliated entities.

3. The Data We Collect About You

We may collect, use, store and transfer different kinds of personal data about you including:

- Identity Data (name, username or similar identifier, title)
- Contact Data (email address, phone numbers)
- Technical Data (IP address, browser type, time zone, location, cookies)
- Profile Data (login credentials, preferences, feedback)
- Audio and Visual Data (voice recordings, video meeting recordings, and call transcriptions from sales, marketing, and customer interactions)
- Usage Data (how you use our website, Services)
- Marketing and Communications Data (your preferences in receiving marketing from us)

4. Cookies and Similar Technologies

We use cookies and similar tracking technologies to enhance your experience on our websites, analyze site traffic, and support our marketing activities. Cookies are small text files placed on your device by a website. Some cookies are necessary for the site to function properly, while others are used to provide insights into how the site is being used or to deliver personalized advertising.

We use the following types of cookies:

Essential cookies: Required for the website to function and cannot be switched off.

Analytics cookies: Help us understand how visitors interact with our websites (e.g., Google Analytics, Leadfeeder).

Marketing cookies: Used for advertising and retargeting (e.g., HubSpot, LinkedIn, Drift).

You can manage or withdraw your cookie preferences through the cookie consent banner displayed when you visit our websites, or by adjusting your browser settings. Disabling certain cookies may impact your user experience.

For more detailed information about the specific cookies we use and their purposes, please contact us at privacy@precursive.com.

5. How We Collect Your Personal Data

We use different methods to collect data from and about you including through:

- Direct interactions (forms, emails, phone calls)
- Automated technologies (cookies, server logs)
- Third parties or publicly available sources (analytics providers, search engines, social networks)

6. How We Use Your Personal Data

We will only use your personal data when the law allows us to. Most commonly, we will use it:

- To perform the contract we are about to enter into or have entered into with you
- To comply with a legal or regulatory obligation
- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests
- Where you have given consent for specific purposes

Specific Uses of Your Data:

To provide transparency on how we apply these lawful bases to our operations, here is a breakdown of how we use specific categories of data:

- **Providing and Managing the Services:** We process your Identity, Contact, Profile, and Usage data to deliver our software, manage your account, process transactions, and provide customer support.
 - *Lawful Basis:* Performance of a contract.
- **Call and Video Recordings:** We record and analyze audio and video from sales, marketing, and customer support communications (such as phone calls and video meetings) to improve our services, train our staff, and ensure quality assurance.
 - *Lawful Basis:* Legitimate interests (for quality assurance and training) and/or Consent (where explicitly required by applicable regional laws, typically obtained at the start of the meeting or call).

- **Marketing and Communications:** We use your Contact and Identity data to send you newsletters, event invitations, and relevant information about Precursive and SDA.
 - *Lawful Basis:* Consent or Legitimate interests (where we have an existing commercial relationship with you and are providing information on similar services).
- **Improving Our Website and Services:** We use Technical and Usage data to monitor and analyze how users interact with our website and platforms to improve functionality, security, and user experience.
 - *Lawful Basis:* Legitimate interests (to keep our website updated, secure our systems, and develop our business)

7. Disclosures of Your Personal Data

We may share your personal data with:

- Internal teams within Precursive and SDA
- External third parties (e.g., service providers, professional advisers)
- Legal and regulatory bodies when required by law

8. International Transfers

Some of our external third parties are based outside the UK/EEA, so their processing of your personal data will involve a transfer of data internationally. Whenever we transfer your personal data out of the UK/EEA, we ensure a similar degree of protection is afforded to it, such as using Standard Contractual Clauses (SCCs).

9. Data Security

We have put in place appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. We also limit access to your personal data to those employees, agents, contractors and other third parties who have a business need to know.

10. Data Retention

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for, including satisfying any legal, accounting, or reporting requirements.

11. Your Legal Rights

Under data protection laws, you have rights including:

- Right to access your personal data
- Right to request correction or erasure

- Right to object to processing or request restriction
- Right to data portability
- Right to withdraw consent at any time

12. Contact and Complaints

If you have any questions about this privacy notice or our data practices, you can contact us at privacy@precursive.com. You also have the right to lodge a complaint with the Information Commissioner's Office (ICO) at www.ico.org.uk, but we would appreciate the opportunity to resolve your concerns before you approach the ICO.

13. Sub-processors

We engage third-party service providers ("sub-processors") to support the operation of our business and the delivery of our services. These sub-processors may process personal data on our behalf and operate under data processing agreements consistent with applicable data protection laws.

We distinguish between:

A. Marketing and General Business Sub-processors

These sub-processors assist with business operations such as customer relationship management (CRM), email communications – including AI powered chatbots on our websites, analytics, advertising, lead generation, and support systems. While they may process business contact (such as Name, email and company) or usage data, they do not access customer content or sensitive service-related information. A full list of these sub-processors is available upon request by contacting privacy@precursive.com.

B. Product – Precursive PSA Solution

Sub-processor	Purpose	Location	Link
Salesforce (Customer Org)	Platform infrastructure (Hosting)	Customer defined	https://www.salesforce.com/

C. Product – Precursive AI Solution

Sub-processor	Purpose	Location	Link
Open AI	Generation of natural language responses via LLM	USA	https://openai.com/

Azure Open AI	Generation of natural language responses via LLM	UK/EU (Customer choice)	https://azure.microsoft.com/en-us
PortKey AI	LLM Gateway for routing AI requests, usage observability, and enforcing rate limits	USA	https://portkey.ai/

14. Nature of Processing Activities

Our processing of personal data includes the following activities:

- Collecting and storing personal data
- Hosting and securing data on our and our subprocessors' infrastructure
- Accessing and retrieving personal data to provide support and services
- Analyzing user behavior to improve functionality and experience
- Communicating with users via email, chat, or telephone
- Recording, transcribing, and analyzing telephone and video communications for quality assurance, training, and service improvement
- Managing subscriptions, transactions, and customer accounts
- Monitoring and auditing use of our services for compliance and security

15. Additional Disclosures for California Residents

This section applies exclusively to residents of the State of California and supplements the details provided in our general Privacy Policy. It outlines your rights under the California Consumer Privacy Act (CCPA), as amended by the California Privacy Rights Act (CPRA).

A. Categories of Personal Information We Collect

In the preceding 12 months, we have collected the following statutory categories of personal information from consumers:

- Identifiers: Name, alias, postal address, unique personal identifier, online identifier, Internet Protocol (IP) address, email address, or account name.
- Customer Records Information: Telephone number and payment information.
- Internet or Other Electronic Network Activity Information: Browsing history, search history, and information regarding your interaction with our websites, applications, or advertisements.
- Audio, Electronic, Visual, or Similar Information: Voice and video recordings from sales, marketing, and customer support calls or meetings.
- Inferences: Profile data reflecting your preferences, characteristics, and behaviour based on your interactions with our Services.

Note: We do not collect "Sensitive Personal Information" as defined by the CCPA (such as social security numbers, precise geolocation, or racial/ethnic origin).

B. Categories of Personal Information Disclosed for a Business Purpose

In the preceding 12 months, we have disclosed all of the categories of personal information listed above for a business purpose to our service providers and sub-processors (such as our cloud hosting providers, CRM platforms, and communication analytics tools).

C. Sale and Sharing of Personal Information

Under the CCPA, a "sale" is defined broadly to include the exchange of personal information for any valuable consideration, and "sharing" is defined as disclosing personal information for cross-context behavioural advertising.

Because we use third-party marketing and analytics cookies (such as HubSpot and LinkedIn) to deliver targeted advertising and measure website performance, we may "sell" or "share" the following categories of personal information: Identifiers and Internet or Other Electronic Network Activity Information.

You have the right to opt out of this practice at any time by managing your cookie preferences through our consent banner.

D. Your California Privacy Rights

If you are a California resident, you have the following rights regarding your personal information:

- **The Right to Know:** You have the right to request that we disclose what personal information we collect, use, disclose, and sell/share about you.
- **The Right to Delete:** You have the right to request the deletion of your personal information that we have collected and retained, subject to certain exceptions.
- **The Right to Opt-Out of Sale or Sharing:** You have the right to direct us not to sell or share your personal information.
- **The Right to Correct:** You have the right to request that we correct inaccurate personal information that we maintain about you.
- **The Right to Limit the Use of Sensitive Personal Information:** You have the right to limit the use and disclosure of your sensitive personal information (however, as noted above, we do not currently collect data that falls under this classification).
- **The Right of Non-Discrimination:** We will not discriminate against you (e.g., by denying goods or services, or charging different prices) for exercising any of your CCPA rights.

E. How to Exercise Your Rights To exercise your rights to know, delete, or correct, please submit a verifiable consumer request to us by emailing privacy@precursive.com. We will verify your request by matching the identifying information you provide with the personal information we already maintain. You may also designate an authorized agent to make a request on your behalf.