IDEALLY CONSULTING LTD
PRIVACY NOTICE (2026)

1. Purpose of this Notice

This Privacy Notice explains how Ideally Consulting Ltd ("we", "us", "our") collects, uses, stores and protects personal data. It applies to clients, prospective clients, suppliers, associates, subcontractors, and anyone who interacts with us in the course of our business.

We process personal data in accordance with:

- the **UK General Data Protection Regulation (UK GDPR)**
- the **Data Protection Act 2018**
- the **Data Protection and Digital Information Act 2024–2025 (DPDIA)**
- all other applicable UK data protection and privacy laws

This notice tells you what personal data we collect, why we collect it, how we use it, and the rights you have.

2. About Us

Ideally Consulting Ltd provides consultancy services in creative strategy and disability inclusion. We are registered in England and Wales (company number **09164746**) and are registered with the Information Commissioner's Office (ICO) under registration number **ZA444585**.

Data Controller: Ideally Consulting Ltd Eight Bells House, 14 Church Street, Tetbury, Gloucestershire, GL8 8JG. E: **hello@ideallyconsulting.com** T: **07779 301621**

As the data controller, we decide how and why your personal data is processed.

3. How We Collect Personal Data

We collect personal data in several ways:

Directly from you, for example:

- when you contact us by phone, email, post, website or social media
- when you request information or a proposal
- when we work with you on a project
- when you provide services to us
- when you send invoices or make payments
- when you give us your business card or contact details

Indirectly, for example:

- via LinkedIn or other social media
- from your website or public profiles
- from referrals
- from publicly available sources (e.g., Companies House)
- from formulaic or standard business email formats
- from associates or subcontractors working with us

Information we do not need

If we receive personal data that is unnecessary for our work, we securely delete or destroy it. If it is an original physical document, we return it to you.

4. Types of Personal Data We Process

We may process the following types of personal data:

- name, job title and business contact details
- business or personal address
- email addresses and telephone numbers
- details of services you receive from us or provide to us
- records of communications and correspondence
- information relating to proposals, enquiries or complaints
- information from surveys, feedback or research
- publicly available information relevant to our work
- signatures on contracts or agreements

We do **not** intentionally collect special category data unless it is volunteered in the context of disability-related consultancy work, and only where necessary.

5. How We Use Your Personal Data

We process personal data only where we have a lawful basis under UK GDPR and DPDIA. We may use more than one lawful basis depending on the purpose.

a. Contractual necessity

To:

- provide consultancy services
- manage projects
- communicate with you
- process invoices and payments
- maintain records
- recover debts where necessary

b. Legal obligations

To:

- comply with tax, accounting and company law
- retain financial records for required periods
- assist with fraud prevention or law enforcement where required

c. Legitimate interests

We may process your data for our legitimate business interests, including:

- business development
- maintaining professional relationships
- managing our operations
- improving our services
- statistical or management purposes

Under DPDIA, some legitimate interests are **recognised in law** and do not require a balancing test (e.g., direct marketing). You may object to processing based on legitimate interests at any time.

d. Consent

We rely on consent only for email newsletters and optional marketing updates. You may withdraw consent at any time.

6. Who We Share Personal Data With

We may share personal data with:

- associates, subcontractors and consultants who help deliver our services
- IT service providers (e.g., cloud storage, email hosting, survey tools)
- professional advisers (e.g., accountants)
- third parties where required by law
- third parties where you have given consent

All third parties are required to keep your data secure and use it only for the purpose for which it was shared.

We **do not** sell or rent your personal data. We **do not** share your data with third parties for their own marketing.

7. International Transfers

We use cloud-based services such as Google Workspace, Dropbox, iCloud, Mailchimp and SurveyMonkey. This means your data may be stored or accessed outside the UK.

Where data is transferred internationally, we ensure appropriate safeguards are in place, including:

- UK International Data Transfer Agreement (IDTA)
- UK Addendum to EU Standard Contractual Clauses (SCCs)
- adequacy regulations issued by the UK government

8. Data Retention

We retain personal data only for as long as necessary:

- **Financial records:** 7 years (to meet HMRC requirements)
- **Clients, associates, subcontractors:** 3 years after last contact
- **Prospective clients, associates, subcontractors:** 2 years after last contact

We may retain data longer if required by law or to establish, exercise or defend legal claims.

9. Your Rights

Under UK GDPR and DPDIA, you have the following rights:

- Right to be informed about how your data is used
- Right of access to your personal data
- Right to rectification of inaccurate data
- Right to erasure in certain circumstances
- Right to restrict processing
- Right to object to processing based on legitimate interests or direct marketing
- Right to data portability
- Right not to be subject to significant automated decision-making
- Right to withdraw consent at any time

Subject access requests now operate under a reasonable and proportionate search standard (DPDIA). To exercise your rights, contact: hello@ideallyconsulting.com

10. Automated Decision-Making

We do **not** use automated decision-making or profiling that produces significant effects.

11. Cookies and Website Analytics

Our website uses cookies to improve functionality and understand how visitors use the site. We use Google Analytics for anonymous usage statistics. We do not use cookies to identify you personally.

You can manage or disable cookies through your browser settings. Where consent is required for non-essential cookies, we will request it clearly.

12. Complaints

If you have concerns about how we handle your personal data, please contact us:

Ideally Consulting Ltd Eight Bells House, 14 Church Street, Tetbury, Gloucestershire, GL8 8JG E: hello@ideallyconsulting.com T: 07779 301621

You also have the right to complain to the Information Commissioner's Office (ICO): on 0303 123 1113 or at https://ico.org.uk/make-a-complaint