



## Maximizer Software Inc.

# Personal Information Protection Policy

At Maximizer Software Inc., we are committed to providing our clients with exceptional service. As providing this service involves the collection, use and disclosure of some personal information about our clients, protecting their personal information is one of our highest priorities.

The prime purpose of collecting your data is to improve your experience and engagement with Maximizer and its solutions and services. We will process your personal information in accordance with the applicable data protection legislation for your territory and in accordance with this policy.

We will inform our clients of why and how we collect, use and disclose their personal information, obtain their consent where required, and only handle their personal information in a manner that a reasonable person would consider appropriate in the circumstances.

Our privacy commitment includes ensuring the accuracy, confidentiality, and security of our clients' personal information and allowing our clients to request access to, and correction of, their personal information.

## Scope of this Policy

This Personal Information Protection Policy applies to all information provided by you or collected by us through all products and services offered by Maximizer Software Inc., Maximizer Services Inc., Maximizer Software Ltd., Maximizer Software Solutions Pty. Ltd. (collectively 'Maximizer'), via any Maximizer-controlled websites (including maximizer.com, maximizerlive.com, maximizercrmlive.com) and other interactions including, but not limited to, email, telephone, meeting, events or social media, except where otherwise noted.

This policy also applies to any service providers collecting, using or disclosing of personal information on behalf of Maximizer.

## How to Contact Us

Please feel free to contact us if you have any questions regarding our Privacy Policy or processing of your Personal Data.

### EMEA Region

Email: [GDPR@Maximizer.co.uk](mailto:GDPR@Maximizer.co.uk)

Tel: +44 (0)1344 766900

### North America Region

Email: [privacyofficer@maximizer.com](mailto:privacyofficer@maximizer.com)

Tel: 1-800-804-6299

# Personal Information Protection Policy

---

## Definitions

**Personal Information** – means information about an identifiable individual, including name, age, home address and phone number, social insurance number, marital status, religion, income, credit history, medical information, education, employment information]. Personal information does not include contact information (described below).

**Contact information** – means information that would enable an individual to be contacted at a place of business and includes name, position name or title, business telephone number, business address, business email or business fax number. Contact information is not covered by this policy.

**Privacy Officer** – means the individual designated responsibility for ensuring that Maximizer Software Inc. complies with this policy.

## Policies

### Policy 1 – Collecting Personal Information

1.1. **Information you provide to us:** We collect information you provide to us via on-line request/order forms, email, through social media, verbally or via business card, including Personal Data, such as your name, phone number and email address; for instance, when you want to:

- Learn more about Maximizer, its products and services.
- Request access to our business and CRM content resources (such as videos, ebooks and webinars).
- Complete feedback and surveys.
- Interact with our Sales, Customer Support and Customer Success Teams for assistance with your Maximizer solutions.

In addition, for the purchase of products/services we collect financial information (such as account or credit card details) for billing/payment requirements.

1.2. **Information we collect automatically:** Maximizer makes use of a technology called “cookies” which store small pieces of information on your computer. We automatically collect information through cookies and similar technologies when you use, access or interact with us via our websites, landing pages, email, advertisements or apps.

Please refer to our [Cookie Policy](#) for further information on the types and reasons Maximizer uses Cookies.

1.3. **Information obtained from other sources:** We may receive information about you from other sources, including third parties, such as:

- **Maximizer Business Partners:** who independently undertake Maximizer related activities, such as the supply, implementation and training of Maximizer products or with whom we may offer co-branded services or engage in joint-marketing activities.
- **Social Media Platforms:** we may also receive information about you from LinkedIn or other social platforms for instance, when you interact with us on these platforms or when we undertake research.
- **Third Party Events:** which we attend or sponsor.

## Personal Information Protection Policy

---

- **Lead Generation:** third parties undertaking lead generation activities on behalf of Maximizer, such as telemarketing, comparison sites and content syndication.
- **Review Sites:** where Maximizer reviews have been submitted by customers such as G2Crowd, Google Business Review etc.
- **Market Research:** where a third party is commissioned to undertake research on behalf of Maximizer.

We protect data obtained from third parties according to the practices described in this Statement and we also apply any additional restrictions imposed by the source of data.

### Policy 2 – Consent

- 2.1. We will obtain client consent to collect, use or disclose personal information (except where, as noted below, we are authorized to do so without consent):
  - **To process your registration and/or request forms** - Some of our sites contain registration and/or request forms that require users to give us contact information (such as their name and e-mail address) and unique identifiers (such as software registration numbers). We use customer contact information from the registration and request forms to send you information about our company and to contact you when necessary. Unique identifiers may be collected for use as account numbers in our record system, or to verify you as a registered user of our software.
  - **To send you relevant content and updates that may be of interest** – We process your name and e-mail address to send you news and updates regarding our company and products). This includes product features and benefits, offers and promotions. With your consent we will also send you communications on CRM Success and value, including best practice, benchmark reports, case studies, testimonials, training and help materials. With all our communications we strive to ensure that information provided is relevant content to you based on demographic information provided, including but not limited to industry and company size.
  - **To give you access to content and events provided by us and our approved third-party partners** – We process your name, e-mail address and telephone number to give you access to activities such as conferences, exhibitions, workshops, and webinars. This also includes blog updates if you subscribe to receiving our monthly updates.
- 2.2. Consent can be provided (e.g., orally, in writing, electronically, through an authorized representative) or it can be implied where the purpose for collecting using or disclosing the personal information would be considered obvious and the client voluntarily provides personal information for that purpose.
- 2.3. Consent may also be implied where a client is given notice and a reasonable opportunity to opt-out of his or her personal information being used for mail-outs, the marketing of new services or products, fundraising and the client does not opt-out.
- 2.4. Subject to certain exceptions (e.g., the personal information is necessary to provide the service or product, or the withdrawal of consent would frustrate the performance of a legal obligation), clients can withhold or withdraw their consent for Maximizer Software Inc. to use their personal information in certain ways. A client's decision to withhold or withdraw their consent to certain uses of personal information may

## Personal Information Protection Policy

---

restrict our ability to provide a particular service or product. If so, we will explain the situation to assist the client in making the decision.

2.5. We may collect, use or disclose personal information without the client's knowledge or consent in the following limited circumstances:

- When the collection, use or disclosure of personal information is permitted or required by law;
- In an emergency that threatens an individual's life, health, or personal security;
- When the personal information is available from a public source (e.g., a telephone directory);
- When we require legal advice from a lawyer;
- For the purposes of collecting a debt;
- To protect ourselves from fraud;
- To investigate an anticipated breach of an agreement or a contravention of law

### Policy 3 – Using and Disclosing Personal Information

3.1. We may use and process your Personal Data, as set out below, where it is necessary for us to carry out activities for which it is in our legitimate interests as a business to do so. We will always ensure this legitimate interest is not outweighed by your privacy rights and that the use of your Personal Data is duly communicated to you in the privacy notice related to that processing.

- **To send you relevant products/services that may be of interest to you** – We may process your name, e-mail address and telephone number for activities related to engagement with prospective customers and opportunities, prospective Certified Solution Providers and Referral Partners and Third-Party Service Providers.
- **To seek your views/comments on the products/services that we provide** - Occasionally, we ask users to voluntarily participate in online surveys. Our online surveys may ask visitors for contact information (e.g. e-mail address), financial information (e.g. yearly combined household income), and demographic information (e.g. post code or zip code, age, location). We keep this information strictly confidential and use it to help us optimize our products and sites for our users.
- **To process a comment on our content** – This includes when you take part in testimonials relating to the delivery of our products and services. We may make use of these comments in our marketing materials and content.
- **For internal analysis to identify general customer trends** - We use this aggregated information to keep track of user activity in relation to the types of products and services our customers and their users use, the configuration of their computers, and performance metrics related to their use Maximizer products and services.
- **To process your job application** - When you apply for a job, we ask you to provide information about yourself for the purpose of reviewing your application. This includes your name, address, contact details (e.g. e-mail address and telephone number), details of your qualifications, skills, experience and employment history; and information from interviews and phone-screenings you may have. We may collect this information in a variety of ways. For example, data might be collected directly through application forms or CVs, obtained from your passport or other identity documents, through interviews or other methods of assessment or indirectly through a third-party recruiter.
- **To process orders, payments and renewals for products/services** - Our sites use order forms for customers to request information, products, and services. We collect your contact information (such

## Personal Information Protection Policy

---

as your e-mail address) and financial information (such as account or credit card numbers). Contact information from the order form is used to send orders and information about our company to our customers. Your contact information also lets us get in touch with you when necessary. We use financial information to bill you for products and services that you have purchased.

- **To ensure delivery of products and services to you as a customer** – Personal Data (name, e-mail address, telephone and job title) is processed for the purchase and delivery of products and services to Maximizer customers, for activities related to Certified Solution Providers and Referral Partners and for work agreed through Third Party Service Providers, all preformed under a contract or with a view of entering one.

3.2. We will not use or disclose client personal information for any additional purpose unless we obtain consent to do so.

3.3. We will not sell client lists or personal information to other parties unless we have consent to do so.

**Other Sites:** Maximizer’s websites contain links to third party vendors, including Google, and show our ads on other sites outside the Maximizer domains. Maximizer is not responsible for the privacy practices or the content of such websites.

**Special Category Data:** Maximizer does not collect any sensitive information (for example, information related to racial or ethnic origin, political opinions, religion or other beliefs, health, biometrics or genetic characteristics, criminal background, or trade union membership) on our websites or any other means.

### Policy 4 - Storing and Processing Your Personal Data (Including International Transfers)

4.1. Your Personal Data may be in some instances, stored and processed outside of European Economic Area (EEA) due to the location of where some of the industry leading systems we use are hosted. The locations for each system are:

- **CRM Software:** United Kingdom own infrastructure for EMEA customers. Canada own infrastructure for North America customers.
- **Financial Accounting Software:** United States of America. Cloud Software.
- **CRM Live Cloud – User Information:** United Kingdom hosted infrastructure for EMEA customers. Canadian infrastructure for North America customers.
- **Email and office applications:** Canada. Cloud infrastructure.
- **Marketing Automation Solution:** United States of America
- **Feedback Surveys:** United States of America.
- **Website:** Canada

4.2. Your Personal Data will only be processed in countries whose data protection legislation has been assessed as adequate by the European Commission, or where adequate safeguards are in place to protect your Personal Data, including Standard Contractual Clauses (SSCs) adopted by the European Commission.

## Personal Information Protection Policy

---

- 4.3. On occasion, customer issue resolution may be escalated to our Support Teams in Canada. Company level information (no Personal Data) is shared to service this activity. There may also be occasions where our employees work outside of Europe and access systems from outside the EEA.
- 4.4. For more information on the safeguards that we have put in place to protect your Personal Data, please contact us directly.

### Policy 5 - Sharing Your Personal Data

- 5.1. We do not and will not sell your data or disclose any Personal Data about our users to third parties with the exception of:
  - **Maximizer Business Partners:** data shared where required for undertaking Maximizer related activities, including the re-sale of Maximizer products and services. Personal Data will be processed by Maximizer Business Partners as independent data Controllers.
  - **Third Party Suppliers:** data shared where undertaking work on behalf of Maximizer such as market research, product related services and software providers. These third parties would be classified as Processors under applicable data protection legislation.
- 5.2. We protect Personal Data shared with the above third parties according to the practices described in this Statement and we also apply any additional restrictions imposed by the source of data.
- 5.3. We will ensure that such third parties are compliant with data protection legislation and the data supplied for processing is used accordingly. In doing so, we enter into confidentiality and data processing terms with partners to ensure they comply with high levels of confidentiality and best practices in privacy and security standards, and we regularly review these standards and practices.

### Policy 6 – Retaining Personal Information

- 6.1. Maximizer only processes Personal Data for as long as necessary to meet our contractual and legal obligations or where we have a legitimate business reason for keeping it. We review Personal Data on a case-by-case basis and document the period of retention for each.
- 6.2. For further information on how long Personal Data is likely to be kept before being removed from our systems and databases, please contact us directly.

### Policy 7 – Ensuring Accuracy of Personal Information

- 7.1. We will make reasonable efforts to ensure that client personal information is accurate and complete where it may be used to decide about the client or disclosed to another organization.
- 7.2. Clients may request correction to their personal information in order to ensure its accuracy and completeness. A request to correct personal information must be made in writing and provide sufficient

## Personal Information Protection Policy

---

detail to identify the personal information and the correction being sought. A request to correct personal information should be forwarded to the Privacy Officer.

- 7.3. If the personal information is demonstrated to be inaccurate or incomplete, we will correct the information as required and send the corrected information to any organization to which we disclosed the personal information in the previous year. If the correction is not made, we will note the clients' correction request in the file.

### Policy 8 – Securing Personal Information

- 8.1. We are committed to ensuring the security of client personal information in order to protect it from unauthorized access, collection, use, disclosure, copying, modification or disposal or similar risks.
- 8.2. We assess security for Confidentiality, Integrity and Availability to ensure that data remains protected, accurate and available for its intended purposes. Some of the core controls we have implemented as part of these certifications are:
  - **Technical assessments** of our systems for vulnerabilities and configuration.
  - **Controlled access** to only approved individuals.
  - **Screening** of relevant employees.
  - **Data handling** training and for all employees.
  - **Policies and procedures** on secure operations and configuration of systems.
- 8.3. We will use appropriate security measures when destroying client's, personal information including shredding documents and deleting electronically stored information.
- 8.4. We will continually review and update our security policies and controls as technology changes to ensure ongoing personal information security.

### Policy 9 – Your Rights in Relation to Your Personal Information

- 9.1. Under data protection legislation you have a number of Rights that are focussed on placing you in control of how your data is processed:
  - **Right to be Informed:** on how your Personal Data is processed – Like our Privacy Hub!
  - **Right to Access:** to the personal information we hold about you.
  - **Right to Rectification:** of any inaccurate personal information we hold about you.
  - **Right to Erasure:** to request that we delete your data, or stop processing it or collecting it, in some circumstances.
  - **The Right to Object:** to the processing of your data, such as requesting us to stop sending you marketing communications.
  - **Right to Data Portability:** request your Personal Data to be sent to another service provider.
  - **Right to Lodge a Complaint:** with relevant country relevant Data Protection Supervisory Authority.
- 9.2. You can reasonably request access to the Personal Data we hold on you, at any time, and we will provide that information free of charge within one month of your request at the latest.

## Personal Information Protection Policy

---

- 9.3. You can request inaccurate or incomplete Personal Data held on you to be rectified or completed or for your Personal Data to be suppressed or erased, and we will respond within one month of your request at the latest.
- 9.4. We may request you to provide a copy of your ID card or otherwise evidence your identity.
- 9.5. We will supply any data you request in a CSV file.

### Policy 10 – Questions, Complaints and Opting Out:

- 10.1. The Privacy Officer or designated individual is responsible for ensuring Maximizer’s compliance with this policy.
- 10.2. Clients should direct any complaints, concerns or questions regarding Maximizer’s compliance in writing to the Privacy Officer. Contact information for Maximizer Software Inc.’s Privacy Officer: [privacy.officer@maximizer.com](mailto:privacy.officer@maximizer.com) or (800) 804-6299
- 10.3. Opting Out
- **EMEA:** To opt out of our direct mail or telephone marketing please call us on +44 (0)1344 766900 or email us at [marketing@maximizer.co.uk](mailto:marketing@maximizer.co.uk)
  - **North America:** To opt out of our direct mail or telephone marketing please email us at <placeholder for email>

### Changes to our Privacy Policies

We review our data protection and privacy procedures and policy regularly and post any changes to our Privacy Policy on this page. We will inform you via email of significant revisions to the privacy policy.

### UK Companies Act Compliance

Maximizer Software Ltd is registered in England (1896712)

**Registered Address:** 2-4 Packhorse Road, Gerrards Cross, Buckinghamshire, SL9 7QE

#### **Mailing Address:**

Maximizer Software Ltd.

1 The Courtyard, Eastern Road, Bracknell, RG12 2XB

Email: [enquiries@maximizer.co.uk](mailto:enquiries@maximizer.co.uk)

Phone: +44(0)1344 766 900

VAT Reg No. GB 417 3803 60