

TOMAS MASON

Coaching

Potentia Leadership Consulting Limited, trading as **Tomas Mason Coaching** ("we", "us", "our") is committed to protecting your privacy. This Privacy Policy ("**Policy**") describes how we process your personal data when you use our services.

Your privacy is very important to us. Please take the time to thoroughly read our Policy as it contains important details about who we are, how we collect, keep, use, and share your personal information, amongst other things. It also outlines your rights regarding your personal data and how to get in touch with us or the appropriate regulatory authority if you have concerns.

We collect, use and are responsible for certain personal data about you. When we do so we are subject to data protection laws of the UK, such as the Privacy and Electronic Communications Regulations, the Data Protection Act 2018, and the UK General Data Protection Regulation (**UK GDPR**) (**Data Protection Laws**).

WHO WE ARE

Potentia Leadership Consulting Limited, trading as Tomas Mason Coaching, is registered in England and Wales (company number 14763660), with the registered address 5th Floor, 167-169 Great Portland Street, London, United Kingdom, W1W 5PF.

This Policy applies to all individuals who visit our [website](#), enquire about or engage in our coaching services.

HOW YOUR PERSONAL DATA IS COLLECTED

We collect your personal data in the following ways:

When you voluntarily provide personal data to us

You may voluntarily provide us your personal data when:

- You contact us in order to enquire about our services;
- You sign up to our newsletter(s);
- You are an employer and correspond with us regarding the services we may provide to you and/or your staff;
- You attend our coaching sessions; and
- You visit our website (however, none of this can be used to personally identify you and is limited to anonymous usage statistics).

Third parties

We may collect your personal data from third parties. This includes:

- Your employer;
- Search engines and third party websites such as Google, LinkedIn and Companies House, and; and
- Other individuals who may refer you to us.

PERSONAL DATA WE COLLECT ABOUT YOU

We may collect the following information to deliver our services to you:

- Your name and contact details (such as email address and phone number); and
- Any other information you provide when you engage our services.

Naturally, the coaching sessions are made up of the topics discussed during them, and the data we collect varies with each session. Some topics that we may discuss with you include:

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- **Professional background:** This includes your employment history, job title, curriculum vitae, skills, and any other relevant information related to your professional background that you may provide us with. This is used to tailor our coaching sessions to you by assessing your previous experiences in order to provide you with our services and highlight development points;
- **Personal background:** This includes information about your personal life such as your interests, hobbies and family life. Please note that the disclosure of personal background information is entirely voluntary and can aid in tailoring the coaching sessions to your specific needs. There is no requirement for you to provide this information whatsoever and we shall only discuss this with you if you wish to do so and provide consent;
- **Session content:** This includes the content of our coaching session including our discussions, any development plans we have agreed to put in place and other strategies we have identified to assist you in becoming more effective in your role. This information is gathered to help identify areas of improvement and to develop personalised coaching strategies;
- **Psychometric testing:** We offer psychometric testing to individuals who think they would benefit from these tests. These are optional and there is never an obligation for you to complete one. These tests can include personality assessments, cognitive ability tests and other tools. These tests are administered to provide objective data and assist in identifying specific areas of focus during our coaching sessions. Any test results are completely confidential between us; and
- Any other topics we deem relevant for your development.

We will not take notes or write post-session reports unless we inform you otherwise and only with your permission. If we do, we will store any files or documents containing your personal information on secure servers. Anything discussed in our coaching sessions remains strictly confidential. Alongside the obligations imposed on us by data protection laws, we also have confidentiality obligations and codes of practise imposed on us by our professional bodies, the European Mentoring and Coaching Council and International Coaching Federation. You can be confident that matters discussed with us remain private.

SPECIAL CATEGORY DATA

Data Protection Laws provide extra protection to special category data due to its sensitivity. Special category data includes data concerning an individual's:

- racial or ethnic origin;
- political opinions;
- religious or philosophical beliefs;
- genetic or biometric data (where the latter is used for identification purposes);
- health; and
- sex life or sexual orientation.

We will not discuss the above with yourself during our coaching sessions unless you wish for us to do so. Where we do discuss one of the above topics and process personal information relating to these, for example, the results of a psychometric test, we will only do so with your **explicit consent**.

HOW AND WHY WE USE YOUR PERSONAL DATA

Under data protection law, we can only use your personal data if we have a lawful reason, such as:

- Where you have given consent;
- To comply with our legal and regulatory obligations;

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- For the performance of a contract with you or to take steps at your request before entering into a contract; or
- For our legitimate interests.

The table below explains what we use your personal data for and why.

What we use your personal data for	Our legal basis
Providing our services to you whether you are an employer or an individual receiving coaching	To perform our contract with you
Gathering and providing information required by or relating to audits, enquiries or investigations by regulatory bodies	To comply with our legal and regulatory obligations
Updating customer records	To perform our contract with you and our legitimate interests such as ensuring we have the right contact details for you in order to organise a coaching session
Marketing our services	If you have given consent to marketing, or for our legitimate interests of promoting our services to customers or those who have shown an interest in our services

MARKETING

We will use your personal data to send you updates about our services, only when you have given us consent to do so or if we have a lawful basis to market to you. You have the right to opt out of receiving marketing communications at any time by contacting us at tm@tomasmason.com.

We will always treat your personal data with the utmost respect and never share it with other organisations for marketing purposes.

WHO WE SHARE YOUR PERSONAL DATA WITH

We may share your personal data:

- Subject to our confidentiality obligations, certain information with your employer, like progress reports and how the sessions are going;
- With other coaches who provide services on our behalf such as our employees, partners, and consultants, in order to provide our services to you;
- With third parties where we think you will benefit from their services and only where you have consented to us sharing your details with them, such as other coaches; and
- Third parties we use to help deliver our services to you including our IT services providers, sharing only the information that is necessary, e.g. sharing your email address on a video-meeting platform where the coaching session is held.

We only allow our third party service providers to handle your personal data if we are satisfied they take appropriate measures to protect your personal data.

We or the third parties mentioned above occasionally also share personal data with:

- Our external auditors, e.g. in relation to the audit of our accounts, in which case the recipient of the information will be bound by confidentiality obligations;
- Our and their professional advisors (such as lawyers and other advisors), in which case the recipient of the information will be bound by confidentiality obligations;
- In very rare circumstances, we may act in order to protect an individual's vital interests by sharing data with the emergency services; and

- Law enforcement agencies, courts, tribunals and regulatory bodies to comply with our legal and regulatory obligations.

We will not share your personal data with any other third party.

WHERE YOUR PERSONAL DATA IS HELD

Any personal data held on you will be held at our offices and those of our third party service providers as described above.

Some of these third parties may be based outside the UK.

HOW LONG YOUR PERSONAL DATA WILL BE KEPT

We will not keep your personal data for longer than we need it for the purpose for which it is used. For example, we will be required to retain your personal data for as long as we provide services to you.

Different retention periods apply for different types of personal data. In determining these, we take into account our legal and regulatory requirements, such as our accounting obligations.

Following the end of the of the relevant retention period, we will delete or anonymise your personal data.

TRANSFERRING YOUR PERSONAL DATA OUT OF THE UK

The UK has differing data protection laws compared to other countries, some of which may provide lower levels of protection of privacy.

It is sometimes necessary for us to transfer your personal data to countries outside the UK. In those cases we will comply with applicable UK laws designed to ensure the privacy of your personal data.

Under data protection laws, we can only transfer your personal data to a country outside the UK where:

- The UK government has decided the particular country ensures an adequate level of protection of personal data (known as an '**adequacy regulation**') pursuant to Article 45 of the UK GDPR;
- There are appropriate safeguards in place, together with enforceable rights and effective legal remedies for you; or
- A specific exception applies under relevant data protection law.

YOUR RIGHTS

You have the following rights, which you can exercise free of charge:

- **Access:** the right to be provided with a copy of your personal data;
- **Rectification:** the right to require us to correct any mistakes in your personal data;
- **Erasure:** the right to require us to delete your personal data;
- **Restriction of processing:** the right to require us to restrict processing of your personal data;
- **Data portability:** the right to receive the personal data you provided to us, in a structured, commonly used and machine-readable format and/or transmit that data to a third party—in certain situations;
- **To object:** to your personal data being processed for direct marketing and other certain situations; and
- **Withdraw consent:** if you have provided us with a consent to use your personal data you have a right to withdraw that consent easily at any time.

If you would like to exercise any of those rights, please:

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- Email us—see below: '**How to contact us**';
- Provide enough information to identify yourself – e.g. your full name, what engagements you have had with us, and any additional identity information we may reasonably request from you; and
- Let us know what right you want to exercise and the information to which your request relates.

KEEPING YOUR PERSONAL DATA SECURE

We have appropriate security measures to prevent personal data from being accidentally lost, or used or accessed unlawfully. We limit access to your personal data to those who have a genuine business need to access it. Those processing your personal data will do so only in an authorised manner and are subject to a duty of confidentiality.

We also have procedures to deal with any suspected data security breach. We will notify you and any applicable regulator of a suspected data security breach where we are legally required to do so.

HOW TO COMPLAIN

Please contact us if you have any queries or concerns about our use of your personal data (see below '**How to contact us**'). We hope we will be able to resolve any issues you may have.

You also have the right to lodge a complaint with the Information Commissioner, who may be contacted using the details at <https://ico.org.uk/make-a-complaint> or by telephone: 0303 123 1113.

HOW TO CONTACT US

You can contact us by emailing tm@tomasmason.com if you have any questions about this Policy or the information we hold about you, to exercise a right under data protection law or to make a complaint.

CHANGES TO THIS PRIVACY POLICY

This privacy notice was published on 16th June 2023.

We may change this privacy notice from time to time—when we do we will inform you via email.