

10 APPENDIX – DATA HELD

Data held on clients, customers, therapists and teachers

Data held	How gathered?	For what purpose?	How do we use it?	Held in-house and/or 3 rd party?	Changes required?
Client name, email address, phone number	New client details and consent form	Contact details essential for running a studio, clinic and running an online class and appointment booking system	Online class booking system, occasionally contact clients through MindBody, export contacts to Mailchimp and ConvertKit for mailshots (name and email only), communication via TDR works phone (with icloud storage)	MindBody (3 rd party cloud-based studio management system). Hard copy at premises – locked in cabinet. Password protected phone and icloud storage.	No
Client emergency contact details	New client details and consent form	For contacting next of kin in case of emergency involving someone at the studio	Would call next-of-kin in case of emergency at studio	MindBody (3 rd party cloud-based studio management system)	No
Client health information	New client details and consent form	To tailor teaching according to each client's needs and pre-existing conditions	Relevant therapists and/or teachers can access information	MindBody (3 rd party cloud-based studio management system). Hard copy at premises – locked in cabinet.	No
Name and email	Transferred	For contacting people	Seeded with imported contacts	Mailchimp & ConvertKit	No

	MindBody	sending video links on YouTube or Vimeo.	automatically maintains its own copy of contacts list (subscribe, unsubscribe etc.)	<i>mailshot system)</i>	
Name, email, phone number	Transferred from MindBody	Making contacts available on mobile devices for TDR staff usage.	Maintained separately from MindBody CRM, for syncing contacts to apple and android handsets	Google contacts for company G Suite google account (<i>3rd party cloud based contacts manager</i>)	No
Name and whatever details shared by their Facebook account privacy settings (<i>held by Facebook</i>)	People sign up for Facebook account, then follow our Facebook page	So clients and customers can keep up to date with news on our Facebook page, and blogs linked to Squarespace website and MindBody.	People follow us on Facebook to keep up to date	Company Facebook page (<i>3rd party cloud based social media</i>)	No
YouTube followers (held by YouTube)	People sign up for YouTube, then follow us	So clients and customers can follow us on YouTube and keep up to date	People follow us on YouTube to keep up to date	Company YouTube account (<i>3rd party cloud based social media</i>)	No
Vimeo followers (held by Vimeo)	People sign up for Vimeo, then follow us	So clients and customers can follow us on Vimeo and keep up to date	People follow us on Vimeo to keep up to date	Company Vimeo account (<i>3rd party cloud based social media</i>)	No
Pinterest followers (held by Pinterest)	People sign up for Pinterest, then follow us	So clients and customers can follow us on Pinterest and	People follow us on Pinterest to keep up to date	Company Pinterest account (<i>3rd party cloud based social media</i>)	No

keep up to date					
Twitter followers (<i>held by Twitter</i>)	People sign up for Twitter, then follow us	So clients and customers can follow us on Twitter and keep up to date	People follow us on Twitter to keep up to date	Company Twitter account (<i>3rd party cloud based social media</i>)	No
Instagram followers (<i>held by Instagram</i>)	People sign up for Instagram, then follow us	So clients and customers can follow us on Instagram	People follow us on Instagram to keep up to date	Company Instagram account (<i>3rd party cloud based social media</i>)	No
LinkedIn followers (<i>held by LinkedIn</i>)	People sign up for LinkedIn, then follow us	So clients and customers can follow us on LinkedIn	People follow us on LinkedIn to keep up to date	Company LinkedIn account (<i>3rd party cloud based social media</i>)	No
Slack followers (<i>held by Slack</i>)	People sign up for Slack, then follow us	So clients and customers can follow us on Slack	People follow us on Slack to keep up to date	Company Slack account (<i>3rd party cloud based social media</i>)	No
Skype followers (<i>held by Skype</i>)	People sign up for Skype, then follow us	So clients and customers can follow us on Skype	People follow us on Skype to keep up to date	Company Skype account (<i>3rd party cloud based social media</i>)	No
WhatsApp followers (<i>held by Whatsapp</i>)	People sign up for WhatsApp, then follow us	So clients and customers can follow us on WhatsApp	People follow us on WhatsApp to keep up to date	Company WhatsApp account (<i>3rd party cloud based social media</i>)	No
Zoom clients (<i>held by Zoom</i>)	People sign up for Zoom, then use links from us to sign into Zoom	So clients and customers can attend appointments and/or classes online	People follow our website blogs, emails and social media to keep up to date	Company Zoom account (<i>3rd party cloud based social media</i>)	No

themselves
through their
own private
accounts

Client names <i>(only if they have paid for a class and/or appointment)</i>	Transferred from MindBody	To track our financial accounts and allow online payment and collection	Used to track our financial accounts, produce reports and present end of year accounts	Xero (cloud-based accountancy package) and Microsoft Excel documents, and PayPal including PayPal Here	No
Client payment records <i>(only if they have paid for a class and/or appointment)</i>	Generated by day-to-day use of MindBody for accounting and billing	To track our financial accounts and allow online payment and collection	Used to track our financial accounts, produce reports and present end of year accounts	Xero (cloud-based accountancy package) and Microsoft Excel documents, and PayPal including PayPal Here	No

Data held on staff – therapists and teachers

Data held	How gathered?	For what purpose?	How do we use it?	Held in-house and/or 3 rd party?	Changes required?
Therapist/teacher name, email address, phone number, photos and videos	Hard copy registration form when new teacher starts work and on MindBody	Contact details essential for running a studio and running an online class booking system	Online class booking and appointment system, occasionally contact therapists/teachers through MindBody, export contacts to Mailchimp or ConvertKit for mailshots (name and email only)	MindBody (3 rd party cloud-based studio management system)	No
Therapist/teacher name and email	Transferred from MindBody	For contacting people and mailshots	Seeded with imported contacts list from MindBody, then automatically maintains its own copy of contacts list (auto subscribe, unsubscribe etc.)	Mailchimp and ConvertKit (3 rd party cloud-based mailshot system)	No
Therapist/teacher name, email, phone number	Transferred from MindBody	Making contacts available on mobile devices	Maintained separately from MindBody CRM	Google contacts for company G Suite google account (3 rd party cloud based contacts manager) and other social media	No
Name and whatever details shared by their Facebook	People sign up for Facebook account, then follow our	So therapists/teachers can keep up to date with news on our	People follow us on Facebook to keep up to date	Company Facebook page and groups (3 rd party cloud based social media)	No

account privacy settings (<i>held by Facebook</i>), including photos/videos and other social media links	Facebook page	Facebook page			
YouTube followers (<i>held by YouTube</i>)	People sign up for YouTube, then follow us	So therapists/ teachers can follow us on YouTube and keep up to date	People follow us on YouTube to keep up to date	Company YouTube account (<i>3rd party cloud based social media</i>)	No
Vimeo followers (<i>held by Vimeo</i>)	People sign up for Vimeo, then follow us	So therapists/ teachers can follow us on Vimeo and keep up to date	People follow us on Vimeo to keep up to date	Company Vimeo account (<i>3rd party cloud based social media</i>)	No
Pinterest followers (<i>held by Pinterest</i>)	People sign up for Pinterest, then follow us	So therapists/ teachers can follow us on Pinterest and keep up to date	People follow us on Pinterest to keep up to date	Company Pinterest account (<i>3rd party cloud based social media</i>)	No
Twitter followers (<i>held by Twitter</i>)	People sign up for Twitter, then follow us	So therapists/ teachers can follow us on Twitter and keep up to date	People follow us on Twitter to keep up to date	Company Twitter account (<i>3rd party cloud based social media</i>)	No
Instagram followers (<i>held by Instagram</i>)	People sign up for Instagram, then follow us	So therapists/ teachers can follow us on Instagram	People follow us on Instagram to keep up to date	Company Instagram account (<i>3rd party cloud based social media</i>)	No

LinkedIn followers (<i>held by LinkedIn</i>)	People sign up for LinkedIn, then follow us	So therapists/ teachers can follow us on LinkedIn	People follow us on LinkedIn to keep up to date	Company LinkedIn account (<i>3rd party cloud based social media</i>)	No
Slack followers (<i>held by Slack</i>)	People sign up for Slack, then follow us	So therapists/ teachers can follow us on Slack	People follow us on Slack to keep up to date	Company Slack account (<i>3rd party cloud based social media</i>)	No
Skype followers (<i>held by Skype</i>)	People sign up for Skype, then follow us	So therapists/ teachers can follow us on Skype	People follow us on Skype to keep up to date	Company Skype account (<i>3rd party cloud based social media</i>)	No
WhatsApp followers (<i>held by Whatsapp</i>)	People sign up for WhatsApp, then follow us	So therapists/ teachers can follow us on WhatsApp	People follow us on WhatsApp to keep up to date	Company WhatsApp account (<i>3rd party cloud based social media</i>)	No
Zoom clients (<i>held by Zoom</i>)	Staff or anyone signs up for Zoom, then use links from us to sign into Zoom themselves through their own private accounts. Staff may need to sign in under TDR Academy to lead a class.	So clients and customers can attend appointments and/or classes online. So staff can take classes and/or appointments online.	People follow our website blogs, emails and social media to keep up to date	Company Zoom account (<i>3rd party cloud based social media</i>)	No

Therapist/teacher names, email address, phone numbers and sometimes postal address	From therapists/ teachers when they join the studio or require payment	To track our financial accounts and allow online payment and collection	Used to track our financial accounts, produce reports and present end of year accounts	Xero (cloud-based accountancy package) and Microsoft Excel documents, and PayPal including PayPal Here	No
Therapist/ teacher invoicing information (amounts invoiced, payment records etc.)	Generated by day-to-day use of MindBody for accounting and billing	To track our financial accounts and allow online payment and collection	Used to track our financial accounts, produce reports and present end of year accounts	Xero (cloud-based accountancy package) and Microsoft Excel documents, and PayPal including PayPal Here	No