

## **CUSTOMER DATA POLICY**

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All employees must adhere to the following policy when dealing with customer information.

When the Company receives, during the course of its business, information relating to the business or otherwise of its customers, it receives such information on the basis that it will remain confidential. Employees agree at all times during their employment to keep such information secret other than when the Company authorises disclosure. Such information is to be viewed only for Company purposes and all such information, whether or not marked as confidential should be used only for Company purposes.



Broadly speaking the Company retains the following types of customer information:

- Customer lists
- Customer Contact names
- Customer orders
- Customer invoices
- Details of terms of agreements with customers
- Other Customer information such as electronic data, designs, plans, drawings

This list is not exhaustive but is designed to provide an indication of ways in which customer information is used.

Staff must agree to adhere to the following guidelines covering the storage and retention of customer information:

- All customer information must be stored confidentially and securely in the relevant section within the IT systems and hard filing systems.
- Customer information should not be retained longer than necessary and should be destroyed according to the relevant guidelines or legal requirements and the customer requirements.
- Customer information and paperwork must not be left lying around so that it can be read by visitors to our premises.

Where employees do not adhere to this policy, disciplinary action could result in dismissal, which may be necessary.



**John Carmichael**  
**Executive Director**  
**March 2022**

Review Date 10<sup>th</sup> March 2023