



# PRIVACY POLICY

**Last Updated:** December 2025

## 1. Introduction

This Privacy Policy explains how **KPI Technologies Limited** ("we", "us", "our" or "KPI Tree") collects, uses, shares, and protects personal data when you visit our website at [kpitree.co](https://kpitree.co) (the "**Website**"), use our platform at [app.kpitree.co](https://app.kpitree.co) (the "**Platform**"), or otherwise interact with us.

We are committed to protecting your privacy and processing your personal data in accordance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018, and other applicable data protection laws.

We are registered in England and Wales with company number 16052672, and our registered office is at 7 Plaza Parade, Maida Vale, London, United Kingdom, NW6 5RP.

## 2. Scope of this Policy

**This Privacy Policy applies where KPI Technologies Limited processes personal data as a data controller.** This includes personal data about:

- visitors to our Website;
- prospective customers and their representatives;
- customers who have signed up for our services, including trial users;
- authorised users of our Platform; and
- individuals who contact us or subscribe to our communications.

**This Privacy Policy does not apply to Customer Content.** When our customers upload data to the Platform for analysis (including company data and financial metrics), we process that data as a **data processor** on their behalf, acting only on their instructions. The processing of Customer Content is governed by our Data Processing Agreement with each customer, not this Privacy Policy. If you have questions about how your data is processed within Customer Content, please contact the relevant KPI Tree customer (the data controller).

## 3. Data Controller

For the personal data described in this Privacy Policy, KPI Technologies Limited is the data controller. This means we determine the purposes and means of processing your personal data.

Our contact details are set out in Section 14 below.

## 4. Information We Collect

We collect personal data from the following sources:

### 4.1 Information you provide directly

- **Account information:** name, email address, company name, job title, phone number, and password when you register for an account or request a trial.
- **Billing information:** billing address, VAT number, and payment details (payment card information is processed by our payment service providers and not stored by us).
- **Communications:** information you provide when you contact us, request a demo, submit support requests, or respond to surveys.
- **Marketing preferences:** your preferences for receiving marketing communications and your communication preferences.

### 4.2 Information collected automatically

- **Technical data:** IP address, browser type and version, device type, operating system, and time zone setting.
- **Usage data:** information about how you use our Website and Platform, including pages visited, features used, session duration, and clickstream data.
- **Location data:** approximate location derived from your IP address.
- **Cookie data:** information collected through cookies and similar technologies, as described in Section 12.

### 4.3 Information from third parties

- **Business contact data:** contact information from business partners or marketing data providers for business-to-business marketing purposes.
- **Company information:** firmographic data about your organisation from publicly available sources or data enrichment providers.
- **Authentication data:** if you use single sign-on (SSO), we receive authentication information from your identity provider.

### 4.4 Keeping your information accurate

It is important that the personal data we hold about you is accurate and current. Please keep us informed if your personal data changes during your relationship with us. You can update your account information at any time by logging into the Platform or by contacting us. If you believe any information we hold about you is inaccurate, please contact us and we will correct it promptly.

## 5. How We Use Your Information

We use your personal data for the purposes set out in the table below, together with the legal basis for each type of processing:

Purpose	Categories of Data	Legal Basis
To create and manage your account and provide our services	Account information, billing information, usage data	Contract performance
To process payments and billing	Billing information, account information	Contract performance
To provide customer support and respond to enquiries	Account information, communications, technical data	Contract performance; Legitimate interests
To send service-related communications (e.g., updates, security alerts)	Account information	Contract performance; Legitimate interests
To send marketing communications	Account information, marketing preferences, business contact data	Consent; Legitimate interests (B2B)
To improve and develop our services	Usage data, technical data, feedback	Legitimate interests
To ensure security and prevent fraud	Technical data, usage data, account information	Legitimate interests; Legal obligation
To comply with legal obligations	All categories as required	Legal obligation
To analyse website performance and user behaviour	Technical data, usage data, cookie data	Consent (cookies); Legitimate interests

## 6. Legal Bases for Processing

We rely on the following legal bases under Article 6 of the UK GDPR:

- **Contract performance:** Processing is necessary to perform our contract with you or to take steps at your request before entering into a contract.



- **Legitimate interests:** Processing is necessary for our legitimate interests or those of a third party, provided those interests are not overridden by your rights and interests. Our legitimate interests include: operating and improving our business; providing and developing our services; understanding how our services are used; marketing our services to businesses; ensuring security; and preventing fraud.
- **Consent:** Where we rely on consent, you have the right to withdraw that consent at any time. We rely on consent for certain marketing communications and for non-essential cookies.
- **Legal obligation:** Processing is necessary to comply with our legal obligations, such as tax and accounting requirements, responding to lawful requests from public authorities, or maintaining records as required by law.

## 7. Sharing Your Information

We may share your personal data with the following categories of recipients:

- **Service providers:** Third-party companies that help us operate our business and provide our services, including cloud hosting providers, payment processors, email service providers, analytics providers, and customer support tools. These providers are contractually obligated to use your data only as necessary to provide services to us.
- **Professional advisers:** Lawyers, accountants, auditors, and insurers who provide professional services to us.
- **Business transfers:** If we are involved in a merger, acquisition, reorganisation, sale of assets, or bankruptcy, your personal data may be transferred as part of that transaction. We will notify you of any such change and any choices you may have regarding your data.
- **Legal and regulatory authorities:** Where we are required to do so by law, or in response to valid legal process, or to protect our rights, privacy, safety, or property, or that of our customers or others.
- **With your consent:** We may share your data with other parties where you have given us your consent to do so.

### 7.1 Sub-processors

A current list of our sub-processors is available on our trust center at [trust.kpitree.co](https://trust.kpitree.co). We will provide at least 30 days' advance notice before engaging any new sub-processor or replacing an existing sub-processor. You can subscribe to sub-processor change notifications through our trust center.

### 7.2 Law enforcement requests

If we receive a request from a law enforcement or regulatory authority for your personal data, we will attempt to redirect the authority to request that data directly from you where possible. If we are compelled to disclose your personal data to such authorities, we will notify you of the request prior to disclosure unless we are legally prohibited from doing so, or where the request relates to an emergency involving the risk of death or serious physical injury.

We do not sell your personal data to third parties.

## 8. International Data Transfers

Your personal data may be transferred to, stored, and processed in countries outside the United Kingdom and the European Economic Area (EEA), including the United States, where some of our service providers are located.

When we transfer personal data outside the UK, we ensure appropriate safeguards are in place to protect your data in accordance with applicable data protection laws. These safeguards include:

- **Adequacy decisions:** Transfers to countries that have been determined by the UK government to provide an adequate level of data protection.
- **UK International Data Transfer Agreement (IDTA):** The standard contractual clauses approved by the UK Information Commissioner's Office for transfers from the UK.

- **EU Standard Contractual Clauses:** Where required, with the UK Addendum, for transfers involving EEA data subjects.
- **UK Extension to the EU-U.S. Data Privacy Framework:** For transfers to certified organisations in the United States.

You may request a copy of the safeguards we use for international transfers by contacting us using the details in Section 14.

## 9. Data Retention

We retain your personal data only for as long as necessary to fulfil the purposes for which it was collected, including to satisfy legal, accounting, or reporting requirements.

The following table sets out our typical retention periods:

Category of Data	Retention Period
Account information	Duration of your account plus 12 months
Billing and transaction records	7 years from the date of transaction (for tax/accounting requirements)
Support communications	3 years from resolution of the support request
Marketing data (prospects)	Until consent is withdrawn or 24 months since last engagement
Website analytics	26 months
Security and audit logs	12 months
Trial account data (inactive)	30 days after trial expiration

We may retain data for longer periods where required by law, to resolve disputes, or to enforce our agreements.

## 10. Your Rights

Under the UK GDPR, you have the following rights in relation to your personal data:

- **Right of access:** You have the right to request a copy of the personal data we hold about you.
- **Right to rectification:** You have the right to request that we correct any inaccurate or incomplete personal data.
- **Right to erasure:** You have the right to request that we delete your personal data in certain circumstances, such as when the data is no longer necessary for the purposes for which it was collected.
- **Right to restriction:** You have the right to request that we restrict the processing of your personal data in certain circumstances, such as when you contest the accuracy of the data.
- **Right to data portability:** You have the right to receive a copy of your personal data in a structured, commonly used, machine-readable format, and to request that we transfer that data to another controller.
- **Right to object:** You have the right to object to processing based on legitimate interests or for direct marketing purposes.
- **Right to withdraw consent:** Where we rely on consent, you have the right to withdraw that consent at any time, without affecting the lawfulness of processing based on consent before its withdrawal.

**To exercise your rights:** Please contact us at [privacy@kpitree.co](mailto:privacy@kpitree.co). We will respond to your request within one month. In some cases, we may need to verify your identity before processing your request.

**Right to complain:** You have the right to lodge a complaint with the Information Commissioner's Office (ICO), the UK supervisory authority for data protection. You can contact the ICO at [ico.org.uk](https://ico.org.uk) or



by telephone on 0303 123 1113. We would, however, appreciate the opportunity to address your concerns before you approach the ICO, so please contact us in the first instance.

## 11. Automated Decision-Making and AI

Our Platform includes AI-powered features that analyse your data and generate insights, recommendations, and action plans. These features use automated processing to identify patterns in your metrics and suggest potential improvements.

**We do not use automated decision-making that produces legal effects or similarly significant effects on you.** The AI-generated outputs from our Platform are provided as analytical tools and recommendations to support your business decisions. All outputs are intended to inform and assist human decision-makers, not to replace human judgment or make binding decisions on your behalf.

The AI features process data you upload to the Platform (as described in our Terms of Service) and use this to generate insights based on metric relationships and patterns. You retain full control over whether and how to act on any AI-generated recommendations.

If you have questions about how our AI features work or wish to understand more about the logic involved, please contact us using the details in Section 15.

## 12. Cookies and Similar Technologies

We use cookies and similar technologies to collect information about your browsing activities and to distinguish you from other users of our Website. This helps us provide you with a good experience and allows us to improve our Website.

The types of cookies we use include:

Cookie Type	Purpose
<b>Strictly necessary</b>	Essential for the Website to function. These cookies enable core functionality such as security, authentication, and accessibility. You cannot opt out of these cookies.
<b>Functional</b>	Enable enhanced functionality and personalisation, such as remembering your preferences and settings.
<b>Analytics</b>	Help us understand how visitors interact with our Website by collecting and reporting information anonymously. This helps us improve our Website.
<b>Marketing</b>	Used to track visitors across websites to enable us to display relevant advertisements. These cookies require your consent.

You can manage your cookie preferences through our cookie banner when you first visit our Website, or at any time by clicking the cookie settings link in the footer of our Website. You can also set your browser to refuse all or some cookies, or to alert you when cookies are being sent. Please note that if you disable or refuse cookies, some parts of the Website may become inaccessible or not function properly.

For more detailed information about the specific cookies we use, please see our [Cookie Policy](#).

## 13. Security

We have implemented appropriate technical and organisational measures to protect your personal data against accidental or unlawful destruction, loss, alteration, unauthorised disclosure, or access. These measures include:

- (a) encryption of data in transit and at rest;
- (b) access controls and authentication mechanisms;



- (c) regular security assessments and penetration testing;
- (d) employee training on data protection and security; and
- (e) incident response procedures.

We maintain SOC 2 Type II certification. Information about our security practices and certifications is available on our trust center at [trust.kpitree.co](https://trust.kpitree.co).

While we take reasonable precautions to protect your personal data, no method of transmission over the internet or method of electronic storage is completely secure. We cannot guarantee the absolute security of your personal data.

## 14. Children's Privacy

Our services are intended for business use and are not directed at individuals under the age of 16. We do not knowingly collect personal data from children under 16. If we become aware that we have collected personal data from a child under 16, we will take steps to delete that information as soon as possible. If you believe that we may have collected personal data from a child under 16, please contact us using the details in Section 15.

## 15. Contact Us

If you have any questions about this Privacy Policy, or wish to exercise your data protection rights, please contact us:

### **KPI Technologies Limited**

7 Plaza Parade  
Maida Vale  
London, NW6 5RP  
United Kingdom

**Email:** [privacy@kpitree.co](mailto:privacy@kpitree.co)

You can also contact the Information Commissioner's Office (ICO) if you have concerns about how we handle your personal data: [ico.org.uk](https://ico.org.uk) | Telephone: 0303 123 1113

## 16. Third-Party Links

Our Website and Platform may contain links to third-party websites, plug-ins, and applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you.

We do not control these third-party websites and are not responsible for their privacy practices or content. When you leave our Website or Platform, we encourage you to read the privacy policy of every website you visit.

This Privacy Policy does not apply to any third-party websites, even if we link to them or they link to us.

## 17. Changes to This Privacy Policy

We may update this Privacy Policy from time to time to reflect changes in our practices, technology, legal requirements, or other factors. When we make material changes, we will notify you by updating the "Last updated" date at the top of this policy and, where appropriate, by email or through a notice on our Website or Platform.



We encourage you to review this Privacy Policy periodically to stay informed about how we are protecting your personal data.

*Previous versions of this Privacy Policy are available upon request.*