Sales for Life | Data Flow Process

STEP	WHERE IS THE DATA HOUSED?	HOW DO WE HANDLE THE DATA?	HOW LONG DO WE KEEP THE DATA?	HOW IS DATA USED?	WHO DO WE SHARE THE DATA WITH?	HOW IS DATA REMOVED OR EXPELLED FROM THE SYSTEM?
Onboarding : collect participant / learner / user contact information (names, emails and phone numbers) + survey key people in each customer.	In Google Sheets within our secure Google Drive instance and/or within the ScalePipeline App (hosted on Digital Ocean) and/or various apps in our Zoho Cloud ERP system.	Data is used for Onboarding + contact management if we need to get a hold of someone to help them throughout the learning experience. Moreover, we review all survey data in Zoho to tailor a bespoke learning & training experience.	Data is securely stored perpetually.	To enhance the learning experience, we may contact learners/users + for better/faster onboarding.	Data is shared with no one outside of Sales for Life.	Upon request to dataprivacy@salesforlife.com, we will remove all customer or individual contact data.
Users access The ScalePipeline App to complete learning and enter data about their work, strategies and specific accounts they manage.	In Google Sheets within our secure Google Drive instance and/or within the ScalePipeline App (hosted on Digital Ocean) and/or various apps in our Zoho Cloud ERP system.	As a part of the training & learning experience, specific users at Sales for Life will review a user's data to offer personalized help, coaching and training as needed or requested.	Data is securely stored perpetually.	To enhance the learning experience, we may contact learners/users + for better/faster onboarding. In addition, Sales for Life anonymizes all data to find patterns and trends for user experience and customer experience reasons. Lastly, anonymized data is used to find patterns for other users in the app to demonstrate effective sales strategies.	Data is shared with no one outside of Sales for Life for user/customer experience reasons. In addition, anonymized data may be revealed to all global users of the app for better learning of sales strategies.	Upon request to dataprivacy@salesforlife.com, we will remove all customer or individual contact data.
Training via Zoom happens in concurrence with learning application work in our App.	In Zoom's cloud.	We use the learning data from Zoom to provide visibility into learning progress.	Data is securely stored perpetually.	Zoom collects data related to who has attended meetings, length of time and more. We use this to provide learning progress to customers and also to uncover patterns and trends, helping to make our solution better. Before conducting analysis, all data is anonymized.	Data is shared with no one outside of Sales for Life for user/customer experience reasons. In addition, anonymized data may be revealed to all global users of the app for better learning of sales strategies.	An individual learner's data removal is not possible without removing data for the entire cohort they're in. This would impact learning progress data availability for customers. If an entire cohort's data is requested for removal, the request can be made to dataprivacy@salesforlife.com.
Learning Progress data is analyzed on a real-time basis and available to users, their managers and company administrators of The ScalePipeline App.	In Google Sheets within our secure Google Drive instance and/or within the ScalePipeline App (hosted on Digital Ocean) and/or various apps in our Zoho Cloud ERP system. In addition, we use MailGun to send learning reports to customers on mass.	We use the learning data from training & learning to provide visibility into learning progress.	Data is securely stored perpetually.	We prepare learning progress reports on a user's completion of work in our App. Thiese reports are available for customers but also used to uncover patterns and trends, hepling to make our solution better. Before conducting analysis, all data is anonymized. These reports are sent using MailGun.	Data is shared with no one outside of Sales for Life for user/customer experience reasons. In addition, anonymized data may be revealed to all global users of the app for better learning of sales strategies.	Upon request to dataprivacy@salesforlife.com, we will remove all customer or individual contact data.
Grading & Certification	In Google Sheets within our secure Google Drive instance and/or within the ScalePipeline App (hosted on Digital Ocean) and/or various apps in our Zoho Cloud ERP system.	Our team grades each user assignment and progress is reported our App. Additionally, the data may be housed in Google Cloud and/or Zoho Cloud ERP.	Data is securely stored perpetually.	Data is used to grade and assess each user's learning application efforts. Anonymized data may be used to uncover patterns and trends to share with customers and/or make our solution better.	Data is shared with no one outside of Sales for Life for user/customer experience reasons. In addition, anonymized data may be revealed to all global users of the app for better learning of sales strategies.	Upon request to dataprivacy@salesforlife.com, we will remove all customer or individual contact data.
Ongoing support	In Google Sheets within our secure Google Drive instance and/or within the ScalePipeline App (hosted on Digital Ocean) and/or various apps in our Zoho Cloud ERP system and/or our Zoom Meetings Cloud.	We use the learning data from support, training & learning to provide visibility into learning progress + track attendance data in Zoom.	Data is securely stored perpetually.	Data is used to assess each user's ongoing learning & training experience. Plus, we review anonymized data from surveys/feedback to better our solution.	Data is shared with no one outside of Sales for Life for user/customer experience reasons. In addition, anonymized data may be revealed to all global users of the app for better learning of sales strategies.	Upon request to dataprivacy@salesforlife.com, we will remove all customer or individual contact data.