

Updated: December 04, 2023

Purpose and Scope

The purpose of this policy is to describe the data retention policies as they pertain to ClickDimensions' customers using the Marketing Automation, Social Marketing, Intelligent Dashboards, Sales Engagement, PowerPack or Marketing Services. This policy applies to the customer data that is used to provide the services in any of the ClickDimensions applications, also referred to as Service Data.

Data Definitions

- **Marketing Automation** - includes marketing functionality focused on inbound marketing, lead management, multichannel orchestration, and campaign management. Features include email marketing, campaign automation, web intelligence, surveys, web forms, landing pages, and more, all designed to help customers market to leads and customers across a range of digital channels. Data elements for Marketing Automation include: recipient email address, recipient phone number, from name and email address, email event data (opens, clicks, unsubscribes, etc.), web form and survey submissions, profile management (contact records), web tracking data such as IP address, page visits and views, URLs, timestamps, operation system data.
- **Social Marketing** - includes social marketing functionality focused on scheduling, publishing, analytics and reporting, content curation, listening, campaign tracking and advocacy programs so customers can manage all their social media activity from one Social Marketing Platform. Data elements for Social Marketing include: social media account name and id, user name and email address.
- **Intelligent Dashboards** - provides a holistic view of sales and marketing performance across all activities and channels by giving customers access to 13 marketing and sales dashboards designed by marketing, sales, and IT experts, tracking more than 172 best-practice KPIs across

customers' marketing automation, CRM, web, and advertising channels. Data elements for Intelligent Dashboards include: aggregated metrics for email sends and events, SMS, web form submissions, web tracking, social marketing.

- **Marketing Audit and Data Assessment** – the Data Assessment offering helps customers understand the current state of their data quality, while also providing them with a plan to build a high-quality data foundation to grow their business. Data elements for the Marketing Audit and Data Assessment includes: Account data including company name, company address, company phone number, company website.
- **Sales Engagement** - optimizes your team's time with automated follow up emails, intelligent lead scoring and smart recommendations on what your team can do next to secure the sale. Includes sales sequences based on buyer's interest and activity and a unified database for Sales and Marketing teams. Data elements for Sales Engagement include: Accounts, Contacts, Leads, Marketing Lists.
- **PowerPack** – combines the 3 most critical sales and marketing automation solutions– Marketing Automation, CRM and Sales Engagement, into a single integrated platform that makes the process faster, easier and more efficient for SMBs. Data elements for Sales Engagement include: Accounts, Contacts, Opportunity and Marketing Lists.

Retention Periods

Unless otherwise noted, Service Data will be retained for the duration of the contract. Service Data is retained for the purposes of syncing to the customer's CRM, lead scoring, qualifying anonymous visitors, and to support Intelligent Dashboards historical reporting.

Account Termination

Ninety (90) days after your Account is cancelled or terminated, an automated process will begin that permanently deletes your Service Data. Customers may request Service Data for an account to be deleted outside of an Account Termination, this process follows the same 90 day timeline.

Data Deletion

Customers may request Service Data to be deleted on a per Subscriber basis at any time by using the Data Subject Access Request process ([EU](#) or [US](#)) or emailing security@clickdimensions.com. Subscriber Email Address and Account Key are required for the deletion requests. Requests are completed within 30 days.

Customers may request Account Data to be deleted without an account termination by contacting the Customer Success Manager or emailing security@clickdimensions.com.

The data deletion method used is Hard Delete within SQL Server. This permanently deletes the data without a recovery method.

Application Data Deletion Timeline

Marketing Automation

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Connection Details	URL, Org Name, Domain, Username, Password (Service User), Certificate or Client Secret (Application User)	<ul style="list-style-type: none"> - Dynamics Database - ClickDimensions Cloud Application - PowerPlatform and Dataverse 	Yes
Emails Sends	Recipient Email address, Contact GUID, Account GUID, Lead GUID, From Name, From Address, Email Template, Personalization Data, Subject Line, Email Send ID	<ul style="list-style-type: none"> - ClickDimensions Cloud Application - Email Platform 	ClickDimensions Cloud Application: Yes Email Platform: 90 days – except for personalization data which is only held until emails are processed
Email Events	Account GUID, Recipient GUID, Recipient Email, Message GUID, Email GUID, Event Type, Split Strategy, Is Automation, Automation GUID, Contact GUID, Entity Name (contact, lead, account), User Agent, URL Original, URL, Ip Address, Description, Platform Type, Operating System, Email Client, Device, Action Node GUID, Delivery, Hard Bounces, Soft Bounces, Spam, Errors, Clicks, Opens, Unsubscribes, Interacted Recipients, Bounced Recipients, Clicked Recipients, Recipients Unique Click Email, Recipients Opened Email	<ul style="list-style-type: none"> - ClickDimensions Cloud Application - Email Platform 	ClickDimensions Cloud Application: Yes Email Platform: 90 days

Sent Email	Account GUID, Email GUID, Split Strategy, Recipient Email, Recipient GUID, Contact GUID, Entity Name (contact, lead, account), Subject, Request Created Date, From Address, Delivery, Hard Bounces, Soft Bounces, Spam, Errors, Clicks, Opens, Unsubscribes, Total Messages sent	- ClickDimensions Cloud Application	Yes
SMS Management	Account data for sms platforms (Twilio, BulkSMS and MessageMedia) – AccountSID, Token, API Key, API Secret, AccountKey	- ClickDimensions Cloud Application	Yes
SMS	To phone number, text content, personalization, Contact GUID, Lead GUID, Account GUID, Owner GUID, message GUID, parent message GUID, from phone number	- ClickDimensions Cloud Application	Yes
Event Management	Account data (user name, email address, AccountSID, Token, AccountKey, API User Name , API password , account name) for Event Platforms such as- Webex Events, Webex Webinar, Cvent, EventBrite, Zoom Webinar, GoToWebinar and Teams.	- ClickDimensions Cloud Application	Yes
Event	Event Start Time, Event Duration, Connector Name, Event ID, Event Topic, Event Sessions, Number Registered, Organizer, Total Attendees, Event Venue Information	- ClickDimensions Cloud Application	Yes
Event Participants	Data submitted by event registrants via registration forms and data collected during events - Q&A and polls	- ClickDimensions Cloud Application	Yes
Web Form Submission	Data submitted by visitors via form fields, data collected about the visit to the page (See Web Tracking Analytics), UTM's	- ClickDimensions Cloud Application	Yes

Surveys	Data submitted by visitors via survey questions, data collected about the visit to the page (See Web Tracking Analytics)	- ClickDimensions Cloud Application	Yes
Subscription Preferences	Email address, phone number, preference (in/out), associated subscription list, data collected about the visit to the page (See Web Tracking Analytics)	- ClickDimensions Cloud Application	Yes
Profile Management	CRM elements included from a Contact or Lead record	- ClickDimensions Cloud Application	Yes
Web Tracking Analytics	<p><u>IP Organizations:</u> IP Address, Organization Name, IP City, IP Postal Code, IP State, IP Country</p> <p><u>Anonymous Visits:</u> IP Organization, IP Address, Postal Code, Latitude, Longitude, IP City, IP Country, IP State</p> <p><u>Visits:</u> Time in UTC, Start Time, End Time, Score, Duration, Total Pages, Bounce (yes/no), First Visit (yes/no), Entry Page, Exit Page, Referrer, Key Words, Referring Host, Referrer Type, IP Organization, IP Address, IP Postal Code, IP Country, IP State, IP City, Browser, Operating System, Flash Version, Language, Adobe Reader (yes/no), linked records (lead, contact, campaign, anonymous visitor)</p> <p><u>Page Views:</u> URL, Page Title, Viewed Date and Time, Domain, Host, Adobe (yes/no), Flash Version, IP Address, Type, Campaign, Browser, Operating System, Language, Referrer, Priority, Legacy, Duration, Keywords, Referrer Type, Linked Records (lead, contact, anonymous visitor, visit, IP Organization)</p>		No

Scoring	Score history and Score entity include the contact / lead record	ClickDimensions Cloud Application	Yes
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Social Marketing

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Social Marketing	User data: name, email, session IP Social media account data: account name and id for X(Twitter), Facebook, LinkedIn, Instagram, YouTube, TikTok	- Oktopost	2 years

Intelligent Dashboards

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Intelligent Dashboards	<p>Data from the following functionalities can be sourced into the Intelligent Dashboard:</p> <p>Email Sends Email Events SMS Web Form Submissions Web Analytics Social Marketing Events</p> <p>In addition, data from the following entities can be sourced into the Intelligent Dashboard:</p> <p>Accounts Contact Leads Marketing Lists</p>	- Intelligent Dashboards Cloud Application	Yes

Sales Engagement

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Sales Engagement	Data from the following entities can be sourced into the Sales Engagement: Accounts Contacts Leads Marketing Lists	<ul style="list-style-type: none">Sales Engagement Cloud Application	Yes

PowerPack

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
CRM	Data from the following entities can be sourced into PowerPack Accounts Contacts Marketing Lists	<ul style="list-style-type: none">PowerPackPower Platform	Yes
Sales Engagement	Data from the following entities can be sourced into Sales Engagement Accounts Contacts Marketing Lists	<ul style="list-style-type: none">PowerPackPower Platform	Yes
Marketing Automation	See Marketing Automation table	<ul style="list-style-type: none">PowerPackPower Platform	Yes

Marketing Audit and Data Assessment

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Customer Data Solutions	Account Name, Main Phone, Address 1: City, Address 1: Country/Region, Address 1: Country/Region Code,	- Microsoft Azure	No

	Address 1: State/Province, Address 1: Street 1, Web Site		
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