

Privacy Policy

That Works | TW-006 | External Policy

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1. About this Privacy Policy

This Privacy Policy explains how That Works collects, uses, stores and protects personal information. It is intended for visitors to our website, people who contact us with enquiries, prospective clients, clients, suppliers and other business contacts.

That Works is committed to handling personal information professionally, transparently and securely, in line with UK data protection law, including the UK General Data Protection Regulation and the Data Protection Act 2018.

2. Who we are

That Works is a UK-based commercial consultancy specialising in Revenue Recovery and Commercial Growth for venues, hospitality businesses and other organisations with underutilised customer data. We work as an extension of our clients' commercial teams, supporting revenue recovery, sales process improvement, CRM usage, market positioning, commercial strategy and, where appropriate, recruitment support for commercial teams.

For the purposes of this Privacy Policy, “we”, “us” and “our” means That Works.

3. Personal information we collect

The personal information we collect depends on how you interact with us. It may include your name, job title, organisation, work email address, telephone number, enquiry details, meeting notes, communications with us, website usage information and any other information you choose to provide.

Where we work directly within a client's CRM or commercial systems, any customer or prospect data contained in those systems remains the property of the client. That Works only accesses and uses such information for the agreed client purpose and in accordance with the relevant contract, data processing terms and instructions.

4. How we collect information

We may collect personal information when you complete a website form, send us an enquiry, email us, speak with us by phone, attend a meeting, connect with us through business networks, engage us to provide services or otherwise communicate with That Works.

We may also receive business contact information from clients, referrals, publicly available sources, professional networks or client systems where access is required to deliver agreed services.

5. Why we use personal information

We use personal information to respond to enquiries, manage client and supplier relationships, provide consultancy and revenue recovery services, arrange and follow up meetings, improve our services, manage our website, maintain business records, meet legal and regulatory obligations and communicate relevant information about That Works where appropriate.

When delivering services for clients, we aim to work directly within client CRM systems wherever possible. This helps avoid unnecessary exports, duplication or uncontrolled copies of client data.

6. Lawful basis for processing

Under UK GDPR, we must have a lawful basis for using personal information.

Depending on the situation, we may rely on one or more of the following lawful bases:

- **Contract:** where we need to use information to take steps before entering into a contract or to deliver services under a contract.
- **Legitimate interests:** where we use information for normal business purposes, such as responding to enquiries, developing client relationships, providing consultancy services, improving our services and protecting our business, provided those interests are not overridden by individual rights.
- **Legal obligation:** where we need to keep or use information to comply with the law, accounting requirements or regulatory obligations.

- **Consent:** where consent is required, such as for certain marketing communications or non-essential cookies.

7. How long we keep information

We keep personal information only for as long as it is needed for the purpose for which it was collected, including any legal, accounting, reporting or contractual requirements.

Enquiry and prospect information is usually kept for a reasonable period to manage follow-up and business development. Client records are kept for the duration of the client relationship and for an appropriate period afterwards. Financial and contractual records may be kept for longer where required by law or good business practice.

Where That Works accesses client CRM data, retention is governed by the client's instructions and the agreed contract. We do not retain client customer data outside agreed systems unless there is a clear business need, lawful basis and client approval.

8. Cookies and website information

Our website may use cookies or similar technologies to help the site work properly, understand how visitors use it and improve the user experience. Some cookies are essential. Where required, we will ask for your consent before using non-essential cookies.

You can usually manage cookies through your browser settings. If we use analytics or marketing cookies, we will provide further information through an appropriate cookie notice or preference tool.

9. Sharing information with third parties

We do not sell personal information. We may share information with trusted third parties where necessary to run our business, deliver services or meet legal obligations. This may include IT providers, CRM or productivity platforms, professional advisers, accountants, insurers, payment providers and other service providers who support our operations.

Where third parties process personal information on our behalf, we expect them to protect it appropriately and only use it for the agreed purpose. Where we access or process client data as part of our services, the terms of the client agreement will govern our role and responsibilities.

10. International transfers

Some of the systems or service providers we use may process information outside the United Kingdom. Where this happens, we will take appropriate steps to ensure that personal information remains protected in line with UK data protection requirements.

11. Your rights

Under UK GDPR, individuals have rights in relation to their personal information. These rights may include the right to be informed, access personal information, correct inaccurate information, request deletion, restrict processing, object to processing, request data portability and withdraw consent where consent is the lawful basis.

These rights are not absolute and may depend on the circumstances. If you wish to exercise your rights, please contact us using the details below. We may need to confirm your identity before responding.

You also have the right to complain to the Information Commissioner's Office if you are unhappy with how your personal information has been handled. We would appreciate the opportunity to address any concerns first, so please contact us if you have a question or complaint.

12. Security

We take information security seriously and use appropriate organisational and technical measures to protect personal information against unauthorised access, loss, misuse or disclosure. We also aim to reduce unnecessary movement or duplication of client data by working within client systems wherever possible.

13. Contact details

If you have any questions about this Privacy Policy or how That Works handles personal information, please contact us at: hello@that-works.co.uk, 71–75 Shelton Street, Covent Garden, London, WC2H 9JQ.

14. Updates to this policy

We may update this Privacy Policy from time to time to reflect changes in our services, business operations, legal requirements or how we handle personal information. The latest version should be published on our website and will show the version number and effective date.

Version control

Version	Date	Author	Summary of changes
1.0	01/09/2026	That Works Consultancy Services Ltd	Initial draft privacy policy for website and external use.