

Privacy Policy



PREPARED FOR
CP Product Advisory, LLC

PREPARED BY
CP Product Advisory, LLC

Privacy Policy

This Privacy Policy (herein referred to as “Policy”) explains how CP Product Advisory, LLC (herein referred to as the “**Company**,” “**we**,” “**us**,” or “**our**”) processes Personal Data that we collect from you (herein referred to as the “**Subscriber**”) as a Controller.

1. DEFINITIONS.

(a) “**Controller**” means the natural or legal person, public authority, agency, or other body, which alone or jointly with others, determines the purposes and means of processing Personal Data.

(b) “**Personal Data**” means any information relating to an identified or identifiable natural person (“**data subject**”). An identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier, or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person.

(c) “**Service(s)**” means providing advisory services to executives and leadership teams of scaling organizations. Services include: Diagnostic engagements assessing how an organization's decision-making system performs under pressure Strategic reviews examining the constraints, tradeoffs, and bottlenecks affecting executive judgment and execution Advisory engagements designing decision architecture, escalation paths, and operating-system structure for organizations navigating growth and complexity Intensive engagements focused on operational alignment, leadership coordination, and decision ownership clarity Ongoing advisory partnerships supporting executives through sustained scaling pressure Free entry-point consultations and assessments to identify whether a deeper engagement is appropriate The practice is advisory-only. CP Product Advisory does not provide execution services, staff augmentation, fractional executive placement, coaching, tactical consulting, or junior product management training..

(i) “**Subscriber**” means the natural or legal person who has subscribed to the Service(s) by agreeing to the Terms.

(ii) “**Terms**” means the binding contract between the Company and Subscriber that governs the Subscriber's access and use of the Service(s).

2. DATA COLLECTION.

The Subscriber directly provides the Company with most of the data we collect. The Company collects Personal Data from the Subscriber from the following sources:

direct submissions through our website (cpproductadvisory.com), including contact forms, intake forms, scorecard registration, and assessment forms. Direct correspondence via email, phone, video call, or other communication channels initiated by the user. Booking platforms (such as our scheduling widget) when users schedule consultations or advisory sessions. Newsletter and content subscriptions through our Substack publication and other content distribution channels. Third-party service providers that support our operations, including our customer relationship management (CRM) platform, email service provider, scheduling system, and analytics tools. Social media and professional networks (such as LinkedIn) when users initiate contact, connect, or engage with our content. Referrals and introductions from existing clients, partners, or professional contacts who provide a prospect's contact information with their knowledge. Automated technologies on our website, including cookies, analytics tools, and similar tracking technologies, which may collect information such as IP address, browser type, device information, and pages visited.

3. PROCESSING OF PERSONAL DATA.

(a) The Company processes the Subscriber's Personal Data to responding to inquiries. To identify, communicate with, and respond to users who contact us through web forms, email, scheduled calls, or other direct channels regarding advisory services, assessments, or related questions. Service delivery. To provide the advisory, diagnostic, and assessment services requested by clients and prospective clients, including conducting consultations, executing engagements, and delivering written or verbal recommendations. Scheduling and coordination. To schedule consultations, advisory sessions, calls, and meetings, and to coordinate calendar availability between CP Product Advisory and the user. Evaluating engagement fit. To assess whether a prospective client's situation, goals, and operating context align with the services CP Product Advisory offers, prior to entering into a formal engagement. Content delivery. To send content the user has requested or subscribed to, including newsletter content, assessment results, scorecard outputs, and other materials provided as part of free entry-point engagements. Marketing communications. With the user's consent, to send communications about CP Product Advisory's services, insights, articles, and updates relevant to leadership and operational decision-making in scaling organizations. Users can withdraw consent at any time through the unsubscribe mechanism in each email or by contacting us directly. Improving services and content. To analyze how users interact with our website, content, and communications in order to improve the quality, relevance, and effectiveness of our advisory practice and published materials. Legal compliance and protection. To comply with applicable laws, respond to lawful requests from public authorities, enforce our agreements, and protect the rights, property, or safety of CP Product Advisory, our clients, or others. Security and integrity. To detect, prevent, and address fraud, security incidents, technical issues, and other harmful or unlawful activity. Internal record-keeping. To maintain accurate records of client engagements, communications, contractual relationships, and business operations as required for ongoing service delivery and regulatory compliance. CP Product Advisory does NOT use personal information for the following purposes: selling personal data to third parties, sharing personal data with third parties for their independent marketing purposes, automated decision-making that produces legal or similarly significant effects on individuals, profiling for behavioral advertising, or any purpose not disclosed in this Privacy Policy..

(b) The Company will generally collect Personal Data from Subscribers only where it needs to create

a contract with the Subscriber, where the processing is in the Company's legitimate interests and not overridden by the Subscriber's data protection interests or fundamental rights and freedoms, or where the Company has the Subscriber's consent. In some cases, the Company may also have a legal obligation to collect Personal Data from the Subscriber.

(c) If the Company processes Personal Data with the Subscriber's consent, the Subscriber may withdraw their consent at any time.

4. SHARING OF PERSONAL DATA.

(a) The Subscriber acknowledges that the Company may share the Subscriber's Personal Data with its group companies and third-party service providers to offer the Subscriber the Company's Service(s) and/or send information or updates about the Service(s).

(b) When the Company processes the Subscriber's order, it may send the Subscriber's Personal Data and use the resulting information from credit reference agencies to prevent fraudulent purchases.

(c) The Company shares Personal Data in the following instances CP Product Advisory shares personal information with third parties only when necessary and for the following specific purposes: Service delivery and operations. To provide the services users have requested, CP Product Advisory shares personal information with third-party service providers that support our day-to-day operations, including customer relationship management (CRM) platforms, email service providers, scheduling and booking platforms, video conferencing services, website hosting providers, analytics platforms, and document management systems. These service providers process personal information only on our behalf and are contractually required to maintain the confidentiality and security of the information they receive. Professional advisors. To support the operation of our business and protect our legal interests, we may share personal information with our own professional advisors, including attorneys, accountants, insurers, auditors, and legal compliance services. These advisors are bound by professional obligations of confidentiality. Legal compliance and protection of rights. To comply with applicable laws, regulations, court orders, subpoenas, or other legal processes, and to enforce our agreements or protect the rights, property, or safety of CP Product Advisory, our clients, our employees, or others. This may include disclosure to government authorities, law enforcement agencies, or regulatory bodies when legally required or when we reasonably believe disclosure is necessary. Business transactions. In the event of a merger, acquisition, reorganization, sale of business assets, bankruptcy, or similar business transaction, personal information may be transferred to the entity or entities involved as part of the transaction. We will notify users of any such transfer in advance and provide options where required by applicable law. With user consent. We may share personal information with other third parties when the user has provided explicit consent to do so, or at the user's direction (for example, when a user requests that we coordinate with a referral source, partner, or introducer). Aggregated or de-identified information. We may share aggregated or de-identified information that cannot reasonably be used to identify an individual user for purposes such as industry analysis, research, demographic profiling, marketing benchmarks, or service improvement. This information does not constitute personal information. CP Product Advisory does NOT engage in the following data sharing practices: We do not sell personal information to third parties for monetary or other valuable consideration.

We do not share personal information with third parties for their own independent marketing, advertising, or commercial purposes. We do not share personal information with data brokers, ad networks, or third-party advertising platforms. We do not engage in cross-context behavioral advertising or targeted advertising based on personal information collected across multiple websites or services. We do not share personal information for any purpose not disclosed in this Privacy Policy without obtaining the user's prior consent..

5. RETENTION OF PERSONAL DATA.

(a) Company retains the Personal Data when an ongoing legitimate business requires retention of such Personal Data.

(b) In the absence of a need to retain Personal Data, the Company will either delete or aggregate it. If this is not possible, the Company will securely store your Personal Data and isolate it from any further processing until it is deleted.

6. SECURITY OF PERSONAL DATA.

The Company uses appropriate technical and organizational measures to protect the Personal Data it collects and processes. These measures are designed to provide a high level of security appropriate to the risk of processing the Subscriber's Personal Data. If you are a Subscriber and have any concerns about the security of your Personal Data, please contact us immediately.

7. MODIFICATION.

The Company keeps this Policy under regular review and may update this webpage at any time. This Policy may be amended at any time, and the Subscriber shall be notified only if there are material changes to this Policy.

8. CONTACT DETAILS.

If you have any concerns about this Policy, please get in touch with us at privacy@cpproductadvisory.com.

ACCEPTANCE AND SIGNATURE.

CP Product Advisory, LLC

Name:

CP Product Advisory, LLC

Name:

Signature:

Date:

Signature:

Date: