

Effective Date: June 4, 2026



1. Introduction and Objective

We at Mosaic Business Consulting are deeply committed to protecting the privacy, confidentiality, and security of the personal data you share with us. This Privacy Policy provides an objective, transparent framework outlining how we collect, use, store, share, and protect your information when you visit our website, engage our consulting services, enroll in our training programs, or communicate with us through our Customer Relationship Management (CRM) platforms.

By interacting with our website or utilizing our services, you consent to the data practices described in this policy.



2. Information We Collect

We collect both information you provide directly and data automatically generated through your interactions with our digital platforms.

A. Information You Voluntarily Provide

- **Contact and Demographic Data:** Full name, email address, phone number, physical address, business name, industry, and demographic profiles.
- **Professional and Financial Information:** Job titles, business metrics, financial histories, operational bottlenecks, revenue goals, and payment details processed via our secure third-party payment gateways.
- **Consulting and Assessment Inputs:** Information, text, and self-assessments submitted through our digital intake forms, calendar booking systems, surveys, and proprietary evaluation tools (such as our operational matrices and worksheets).

B. Information Automatically Collected

- **Technical Log Data:** IP addresses, browser types, operating systems, referring URLs, access times, pages viewed, and device parameters.
- **Cookies and Tracking Technologies:** We utilize cookies, web beacons, and tracking pixels to analyze website traffic trends, optimize platform performance, and personalize your digital browsing experience. You can control cookie preferences directly through your browser settings.



3. How We Use Your Information

We use the data we collect to run our core consulting operations, improve service delivery, and maintain strong client relationships. Specifically, we use your information to:

- Deliver, manage, and scale our hand-tailored business planning, coaching, and training services.
- Process service transactions, distribute monthly invoices, and manage automated financial pipelines.
- Optimize and streamline our CRM infrastructure to provide prompt, responsive customer care.
- Distribute educational publications, market insights, and promotional materials. You may opt out of marketing communications at any time via the provided “unsubscribe” link.
- Enforce safety protocols, monitor compliance with our terms of service, and satisfy municipal, state, or federal legal obligations.



4. How We Share Your Information

We do not sell, rent, or trade your personal data to outside marketers. We only share data within strict operational boundaries, including:

- **Third-Party Service Providers:** Trusted vendors who provide necessary infrastructure for our operations, such as website hosting, secure payment processing, automated email distribution systems, and CRM platform management tools (e.g., GoHighLevel). These partners are

legally restricted from using your data for any purpose other than providing these specified services to us.

- **Corporate Transitions:** In the event of a merger, acquisition, asset sale, or restructuring, your data may be transferred to the succeeding entity under strict confidentiality agreements.
- **Legal Mandates:** We will disclose your information if required to do so by law or subpoena, or if we believe such action is necessary to comply with municipal regulations, protect our rights, or safeguard the safety of our staff, clients, and community.



5. Data Security and Retention

We implement uncompromised technical, physical, and administrative security measures to protect your data from unauthorized access, loss, alteration, or disclosure. These safeguards include encrypted digital data transmissions, secure firewalls, and restricted access for administrative users.

We retain your personal data only as long as necessary to fulfill the operational purposes outlined in this policy, satisfy legal or tax requirements, or resolve ongoing business disputes.



6. Your Rights and Choices

Depending on your geographic location and local municipal parameters, you may possess specific rights regarding your personal data, including:

- **The Right to Access:** You may request a comprehensive digital copy of the personal information we hold about you.
- **The Right to Rectification:** You may request that we correct or update inaccurate or incomplete personal data within our systems.
- **The Right to Erasure:** You may request that we permanently delete your personal data from our CRM and database logs, subject to certain legal or financial retention exceptions.



- **Opting Out of Communications:** You can instantly halt our automated marketing and promotional email sequences by clicking the “Unsubscribe” button at the bottom of any digital publication.

To exercise any of these rights, please submit a formal, direct request via the contact channels provided below.



7. Third-Party Links and Integrations

Our website and digital publications may contain links to external, third-party platforms (such as social media networks or strategic vendor portals). This Privacy Policy applies exclusively to Mosaic Business Consulting. We do not control, and assume no responsibility for, the privacy practices or content configurations used by external third-party sites. We encourage you to review the privacy policies of any third-party platform you visit.



8. Updates to This Privacy Policy

We reserve the right to modify, update, or replace this Privacy Policy at any time to reflect evolving regulatory environments, technological advancements, or operational changes. When we make revisions, we will immediately update the “Effective Date” at the top of this document. We encourage you to review this policy periodically to stay informed about how we safeguard your information.



9. Contact Information

If you have any questions, concerns, or requests regarding this Privacy Policy or our internal data handling methodologies, please connect with us directly at:

Phone: (828) 338-2833

Email: laura@mosaicbusinessconsulting.com

Website: www.mosaicbusinessconsulting.com

Laura Wagenknecht, MSW, CEC

Founder and CEO, Mosaic Business Consulting