TRILOGY RESEARCH

Annex A · Data Processing Description

Version 1.0

24 October 2026

CONTACT

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Trilogy Research Limited · Registered in England and Wales No. 14632667 · VAT GB446142800

Annex to the Trilogy Research Limited Data Processing Agreement

This annex describes the processing we carry out as your processor. The service lines below cover everything we offer under our trading names; your order or statement of work says which apply to you. Where a service is not in your order, we do not process data for it.

1. Parties

– **Controller:** the Client named in the Main Agreement.
– **Processor:** Trilogy Research Limited (company number 14632667), 2 Bedford Mews, East Finchley, London N2 9DF. Contact: privacy@trilogyresearch.co.uk. Data protection officer: none appointed (not required).

2. Subject matter and duration

Personal data that you give us, or that reaches us through a service we run for you, processed for the term of the Main Agreement and the return-or-deletion period that follows it.

3. Nature and purpose, by service line

3.1 Voice AI agents (any of our brands). We build and run AI agents that answer, or with consent make, telephone calls and messages for you. Purpose: handling your callers' enquiries, bookings and follow-ups as you instruct. Nature: receiving and placing calls; transcribing and, where you instruct, recording conversations; extracting the details your workflow needs (name, contact details, reason for call, appointment); passing them to your systems; sending confirmations. Every agent announces that it is AI, that the call may be recorded, and where to find your privacy notice.

3.2 Search Answer Optimisation and Search Agent Optimisation audits (Agent Optimisation). We assess how AI assistants describe your business and recommend changes. Purpose: your audit report. Nature: asking AI assistants questions about your business; reading your public web content; preparing a report. Personal data is incidental: names and roles of your own people where they appear in public material or AI answers; names of other individuals are removed.

3.3 Agentic systems and automation (RealTimeSense). We design, build and maintain software agents and workflows connected to your systems. Purpose: the automation described in your statement of work. Nature: configuring agents; connecting to the systems you give us access to (for example your CRM, inbox or forms); testing with the data those systems hold; monitoring and fixing the live system. We use test data where we can and the minimum live data where we cannot.

3.4 On-premises systems (PracticeSense). As 3.3, but the system runs entirely on your equipment. Personal data never leaves your premises; our support work and backups never copy it off your equipment. We process only what we see while supporting the system.

3.5 Assessments and readiness checks (CheckSense). Where you ask us to run an assessment of your organisation, we process the answers your people give to prepare the results.

3.6 Hosting of client-facing pages, forms and reports. Where we host a page, form or report for you, we process the data it collects or displays, on your instructions.

4. Types of personal data

Depending on the service: names; job titles and roles; business and, where your callers give them,

personal contact details (telephone, email, postal address); the content of calls, messages and transcripts, and recordings where you instruct; appointment and enquiry details; account identifiers in your systems; technical data (IP address, device, time) where a hosted page or agent logs it. Special category data (health, beliefs and similar) only where your service requires it and you have told us in writing; then your agent asks for it only as you instruct. Anything sensitive a caller volunteers is never copied into summaries, notes or your systems, and is deleted with the recording.

5. Categories of people

Your customers, prospective customers, callers and enquirers; your staff and contractors who use or appear in the systems; people named in material you give us to assess; anyone who contacts a channel we run for you.

6. Processing operations

Collection; recording and transcription; storage; organisation and structuring; retrieval; use for the purposes above; transmission to your systems and to sub-processors; erasure. No profiling with legal or similarly significant effects; no selling; no use for other clients or for our own purposes; no training of AI models.

7. Retention

As you instruct in the Main Agreement or statement of work, and otherwise: call recordings and transcripts, 90 days; working data for a build, deleted at hand-over or kept only as long as support requires; assessment data, 24 months after the report; all of it returned or deleted at the end of the services under clause 2.9 of the agreement.

8. Location

We work from the United Kingdom. Sub-processors and their locations are in Annex C; transfers outside the UK are protected as clause 2.11 of the agreement describes.

9. Frequency

Continuous for running services (agents, automations, hosting); one-off for audits and builds, repeated at each engagement.

VERSION 1.0 · LAST UPDATED 24 OCTOBER 2026