Privacy Policy

Insource Automation Pty Ltd (ABN 83 676 272 843) ("Insource", "we", "us") handles personal information in accordance with the Australian Privacy Principles (APPs) in the Privacy Act 1988 (Cth). This policy explains what personal information we collect, how we use it, who we share it with and how you can contact us.

Effective date: 20 November 2026. Version 2.

1. Who this policy covers

This policy covers personal information we handle in running our own business, including information about our clients' directors and staff, prospective clients, suppliers, website visitors, event attendees and job applicants.

When we deliver services, we often access our clients' systems, which may contain personal information about our clients' own customers. We handle that information on our client's behalf and under our service agreement with them. Our client's own privacy policy governs how they collect and use their customers' information.

2. What we collect

The kinds of personal information we collect include:

- name, job title, employer and business contact details (email, phone and address)
- communications with us, including emails, messages, meeting notes, and meeting or call recordings and transcripts
- information about the services you use or ask about, and our dealings with you
- billing and payment information needed to invoice and receive payment. We do not store card numbers ourselves. Card and direct debit payments are processed by Stripe and GoCardless, and bank transfers are reconciled in our accounting software, Xero. These providers may store payment details under their own privacy policies
- information collected through our website, booking pages and forms, such as device and browser data, pages viewed and cookie data
- information in job applications, such as work history and referees
- any other information you choose to give us

We do not ask for sensitive information (such as health information) about you. If we receive it, we handle it as set out in section 6.

3. How we collect it

We mostly collect personal information directly from you: in meetings and calls, by email, through our website, booking pages and forms, and when you engage our services. We may also collect it from your employer, people who refer you to us, industry bodies and events, and public sources such as company websites and LinkedIn.

4. Why we collect and use it

We use personal information to:

- respond to enquiries and provide, manage and support our services
- schedule, record and keep notes of meetings
- invoice, receive payment and keep business records
- improve our services and develop reusable tools and templates (without using our clients' confidential information)
- send you information about our services, where permitted
- recruit staff and contractors
- meet our legal and insurance obligations

You can opt out of marketing emails at any time using the unsubscribe link or by contacting us.

5. Our use of AI and automation

We use artificial intelligence (AI) and automation tools in our business. These tools are connected to our email, calendar, meeting, document, CRM and project management systems. They help us draft and summarise emails and documents, take meeting notes, organise information and complete tasks.

This means personal information you send us, or that we collect in meetings, may be processed by these tools. In particular:

- **Email is processed by AI.** Emails and attachments you send us may be read and summarised by AI tools as part of our normal workflow.
- **Meetings may be recorded and transcribed.** We tell you at the start of a meeting if it is being recorded or transcribed.
- **Business plans only.** Where available, we use business or commercial versions of these tools, under terms that do not allow the provider to use our data to train its AI models.
- **People stay responsible.** A member of our team reviews AI-assisted work before we rely on it in our services.
- **No significant automated decisions.** We do not use computer programs to make decisions about you that could significantly affect your rights or interests.

6. Please don't email us passwords or bulk personal information

Because our email is processed by AI tools, please do not send us passwords, multi-factor codes, API keys or other credentials, client lists or data exports, tax file numbers, identity documents, bank or card details, or health information by email, chat or meeting chat. Contact us first and we will provide a secure way to share it. If you send this kind of information by email, we will delete it once we become aware of it and let you know, and you should change any credentials you sent.

7. Who we share it with

We may disclose personal information to:

- service providers who help us run our business, such as providers of AI services, email, calendar and scheduling, video meetings and phone, CRM, project management, document storage, forms, accounting and payment services
- subcontractors and staff working on our behalf, who are bound by confidentiality obligations
- our professional advisers and insurers
- third parties you ask us to deal with
- a buyer of all or part of our business, under confidentiality
- regulators and others where required or authorised by law

We do not sell personal information.

8. Overseas disclosure

Many of our service providers store or process data outside Australia. We are likely to disclose personal information to recipients in the United States, member states of the European Union and other countries where our service providers or their sub-processors operate. Locations depend on each provider and may change. We take reasonable steps to choose reputable providers with appropriate security and confidentiality terms.

9. Security and retention

We take reasonable steps to protect personal information from misuse, interference, loss, and unauthorised access, change or disclosure. These include multi-factor authentication, access controls and business-grade software. We keep business records for at least 7 years where required by law. When we no longer need personal information, we take reasonable steps to destroy or de-identify it.

10. Access and correction

You can ask to access or correct the personal information we hold about you by contacting us. We may need to verify your identity first. We will respond within a reasonable time, usually 30 days. We do not charge for a request, but may charge a reasonable fee for providing copies. If we refuse a request, we will tell you why.

11. Complaints

If you have a privacy question or complaint, contact us at info@insourceautomation.com.au. We will acknowledge your complaint and aim to respond within 30 days. If you are not satisfied with our response, you can complain to the Office of the Australian Information Commissioner at oaic.gov.au or on 1300 363 992.

12. Contact us

Insource Automation Pty Ltd
ABN 83 676 272 843
Kew VIC 3101
Email: info@insourceautomation.com.au
Website: www.insourceautomation.com.au/contact-us

13. Changes to this policy

We may update this policy from time to time. The current version, with its effective date, is always on our website.