

# Data Security Measures for Service Transformation Benchmark

September 30, 2021

## moreMomentum's Information Security Measures

This document describes moreMomentum's information security measures to safeguard the confidentiality, integrity and availability of confidential business information, personal data, and the benchmark reports.

These have been set up to comply to the ISO 27001 standards for Information Security Management System.

moreMomentum is running a project to be fully compliant to the ISO 27001 standards and be certified by mid 2022.

## Context

The Service Transformation Benchmark is a repetitive benchmark exercise with an annual cycle. The value of the repetition is to monitor progress of the service development of a company, monitor trends in services businesses across industries and to stay up to date with the emerging best practices.

## Types of Data

In the Service Transformation Benchmark we capture, use and produce the following data from participating companies and their employees:

- Factual business data:  
Like financial data, headcount, values of performance metrics from participants
- Personal data of employees:  
Names, job-title, email address and some phone numbers of employees from participants.
- Individual survey responses of individual employees:  
Like their view on the maturity of certain business capabilities and the importance of capabilities for the success of their business.
- Aggregated benchmark data and insights:  
Aggregated insights from the analysis of data and moreMomentum's interpretation of the information from the data.
- Company-specific benchmark data and insights:  
Company specific values of the analysis, compared to the aggregated data and insights.
- Cookie files:  
Employees of participants that are invited to participate in a survey will use a few of our platforms (support website, LimeSurvey, JotForms). Each of these will store a cookie to allow proper functioning of the platform. These cookies will not be used for any other purpose.

- Logging data:  
 LimeSurvey and JotForms will keep track of access and submission of data, including IP-address, date and time.  
 In case respondents submit a support request via the support site, our CRM/Support system will track and store their ticket and personal information they provide (name, email address, potentially their phone number).

## moreMomentum’s use of the data

The following outlines how moreMomentum uses the data and what will not be done with the data.

Type of data	Use by moreMomentum	Excluded from use by moreMomentum
Factual business data	Analysis of trends and correlations across industries (for aggregated reports) and within individual companies (for company specific reports).	Disclosure of any company specific data and information.*
Personal data of employees	Send invitations to employees to submit data or to conduct a survey, including reminders.  If needed, we may send individual respondents an email if we need clarification of their response.  These personal data are also used to help managing consistency of respondents for repeat-benchmarks.	Sending promotional information, articles, or other information.**  Providing any personal data to any external party.
Individual survey responses of individual employees	Calculate average scores for each company, business unit and function to include in the aggregated analysis and company specific analysis.	Disclosure of any individual responses to anybody, including to any stakeholder in the company of the respondents.
Aggregated benchmark data and insights	Publication in a state-of-the-service report to all benchmark participants.  Publication in public summary reports, articles, webinars and conferences.	Disclosure of aggregated data of segments with low number of respondents.
Company-specific benchmark data and insights	Dissemination to designated contacts in the respective participants.	Distribution to any other employees of the participant or to any other party.*)
Logging data	Monitor progress of response, send reminders and update designated coordinators of participants for internal follow up.	Disclosure of any other information related to the invitees and respondents.

- \* ) If participants join in the Service Transformation Benchmark via their consultant and agree that this consultant has access to the raw data and benchmark reports. moreMomentum will only disclose this information to this consultant when agreed in writing with the participant.
- \*\* ) Individuals may subscribe to our general or benchmark-specific newsletter if they wish. For this, we follow a double opt-in process and GDPR-compliant privacy policies.

## Access to data

Type of data	Accessible by
Factual business data	moreMomentum’s Analytical Operations Team*
Personal data of employees	moreMomentum’s Account Management Team moreMomentum’s Back Office Team
Individual survey responses of individual employees	moreMomentum’s Analytical Operations Team
Aggregated benchmark data and insights	All employees and advisory partners of moreMomentum
Company-specific benchmark data and insights	moreMomentum’s Account Management Team moreMomentum’s Analytical Operations Team*
Logging data	moreMomentum’s Back Office Team

- \* ) If participants join in the Service Transformation Benchmark via their consultant and agree that this consultant has access to the raw data and benchmark reports. moreMomentum will only disclose this information to this consultant when agreed in writing with the participant.

At this moment, no subcontractors or external partners are involved in capturing and analysing data and generating reports.

## Removal of data

Type of data	Use by moreMomentum
Factual business data	Participants’ company name and any references will be deleted on request. In such case, all benchmark data will be anonymised for aggregated trends analysis for future benchmark reports.
Personal data of employees	All personal data will be deleted on request of the participant or an individual respondent.
Individual survey responses of individual employees	Any survey response will be anonymised on request, by removing any reference to specific individuals.
Aggregated benchmark data and insights	Will not be deleted, as it does not include any specific information of individual companies or people.

Company-specific benchmark data and insights	Will be deleted from all our systems on request.
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Removal of data includes deleting it from any system of moreMomentum as well as any partner or subcontractor of moreMomentum. In case an external party was involved on the participants behalf, it is not moreMomentum’s responsibility to remove and information or data from systems of this external party.

## Storage and flows of data

### Preparing the data capture

- moreMomentum’s primary contact at the participant will send an excel-file with designated coordinators to their primary contact at moreMomentum. This excel-file will contain first name, last name, title, email address and phone number.
- The contact details of the designated coordinators will be entered into our CRM System (HubSpot) and our website (HubSpot), to grant designated coordinators access to support information specifically for them.
- The designated coordinator(s) at the participant will prepare an excel-file that lists all employees to be invited for specific surveys. This excel-file contains first name, last name, business unit, department, title, and email address of each respondent. They will upload the excel-file(s) via JotForms (embedded in a web page on our support website). JotForms automatically uploads the excel-file to the Back-Office Operations’ SharePoint Site for Back Office Operations.
- This primary contact at moreMomentum will save the excel file in SharePoint Site for Back Office operations.

### Capturing the data

- moreMomentum’s Back Office Team will process the excel-files with information of respondents to send out the invitation emails to each respondent and to manage the progress of response. All information will be added to a central database (excel-file on the Back Office Operations’ SharePoint Site).
- moreMomentum’s Back Office Team will prepare an excel-file with all data needed for the Analytical Operations Team, in which all individual respondents are anonymised.
- For excel-based questionnaires, the Back Office will send an email via MS Exchange to the respective respondents, with a link to download the excel file from our support website (HubSpot). The respondent will enter all information asked in the questionnaire into the excel file and upload this via JotForms (embedded in a web page on our support website). JotForms automatically uploads the excel-file to the Analytical Operations’ SharePoint Site for Analytical Operations.
- For web-based surveys, the Back Office enters contact details into Lime Survey which automatically sends out invitation emails to the respective respondents, with a link to the online survey. The respondent will enter all information via this web-based survey. Periodically, the Analytics Operations Team downloads all responses in a CSV-file and uploads this to the Analytical Operations’ SharePoint Site.
- All respondents have access to the support website for support information or to contact our support team, all managed by HubSpot.

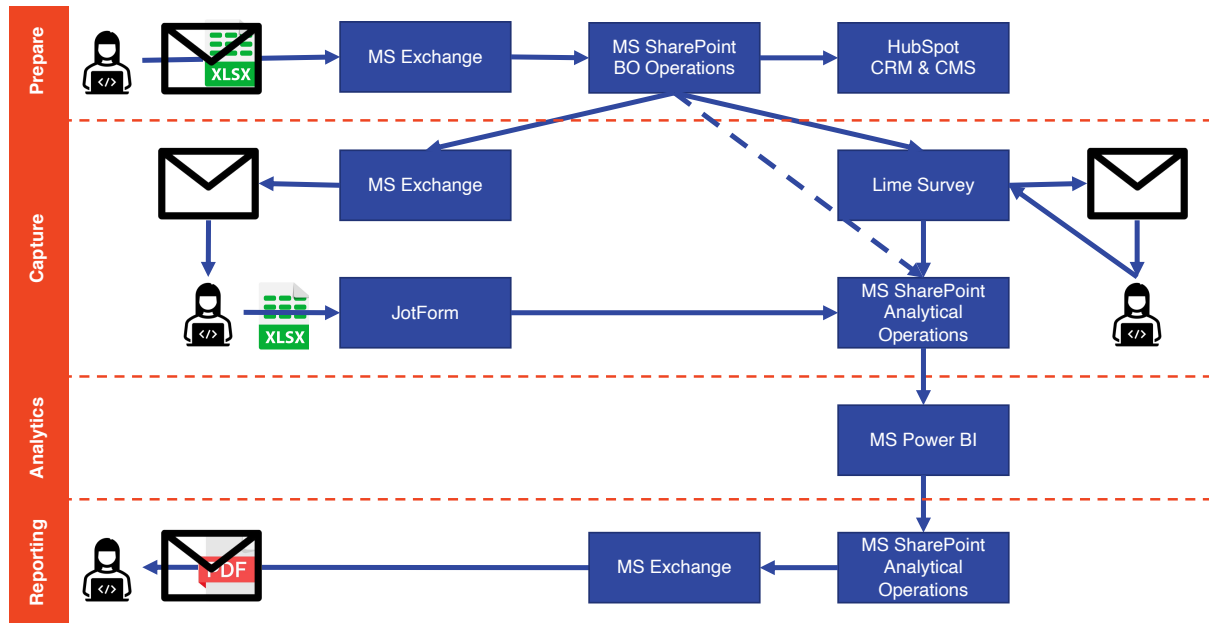
Analysing the data

- MS Power BI automatically accesses the data in the MS SharePoint Site for Analytical Operations. All statistical analytics are conducted within MS Power BI, including creating the visualisations.
- The Analytical Operations Team will create the aggregated report and company specific reports in MS Word, which is stored at the MS SharePoint Site for Analytical Operations.

Report the data and insights

- The Benchmark Operations team will send the designated primary contact of each participant their respective company-specific report in pdf-files via MS Exchange.

Data Flow for the Service Transformation Benchmark



Systems	Location	Security measures
MS Exchange	European Union*	Delete emails with personal data every month
MS SharePoint – Back Office Operations	European Union	No synchronisation to individual devices
MS SharePoint – Analytical Operations	European Union	No synchronisation to individual devices No storage of personal information, other than unique numerical key
JotForms	Germany	Point-2-Point encryption with private key Delete responses every month
Lime Survey (hosted service)	Germany	Delete responses every month
MS Power BI	Netherlands	Accessible by Analytical Operations only No storage of personal information, other than unique numerical key

HubSpot CRM & CMS	Germany	
All		Secured and encrypted communication protocols (SSL)

\*) Microsoft does not disclose in which of their data centres in Austria, Finland, France, Ireland, and the Netherlands our data is stored.

<https://docs.microsoft.com/en-gb/microsoft-365/enterprise/eu-data-storage-locations?view=o365-worldwide>

## Organisational Information Security Measures

- moreMomentum has strict confidentiality and privacy policies in place for customers and their employees.
- Employees have only access to data on a need-to-know basis, as described above. Managing and using personal data of invitees and respondents for surveys are located in separate SharePoint sites than (anonymised) response and other incipiurt from benchmarking clients.
- Employees and potential partners sign strict NDA agreements with moreMomentum, that require them to comply to privacy and confidentiality policies and agreements with customers.

## Technical Information Security Measures

- Employees of moreMomentum are required to have strong passwords and change passwords every quarter.
- Employees do not synchronise or copy personal data and benchmark data to their devices.
- moreMomentum only uses top quality and recognised brands for IT systems, to secure privacy, confidentiality and security of data and information.
- All office locations of employees, subcontractors and partners who have access to any system of moreMomentum, have an up-to-date firewall at their (home)offices.
- All devices of employees, subcontractors and partners who have access to any system of moreMomentum, are protected with leading and up-to-date software for malware detection and removal as well as anti-virus. This includes pc's, laptops, tablets, and smartphones. All have automatic updates enabled.
- All files and data (all stored on SharePoint) are backed up regularly.
  - Once a week a full backup.
  - Once a day a differential backup.
  - Both stored on a local networked attached storage (RAID 1).
  - Each kept for 4 weeks.
- Access control measures
  - Only authenticated users have access to moreMomentum's applications and systems
  - All employees, subcontractors and partners who have access to moreMomentum's systems are enforced to use strong passwords and change their passwords every 3 months.
  - For all systems processing customer's and personal data, users are forced to use Two-Factor-Authentication.

- All systems can only be accessed via encrypted protocols, like HTTPS.  
Files with confidential information, uploaded via Jotform have an additional point-2-point encryption, using the RSA-2048 algorithm. Information is only accessible by users who have the private key.
- All devices of employees, subcontractors and partners have automatic screen-lock enabled, no later than 5 minutes of idle time. All devices require a password to unlock.
- All devices of employees, subcontractors and partners will keep their operating systems and applications up-to-date automatically.
- Any device or storage with customer data and personal data will be wipe before disposal.