SalesFlowLab

GOVERNANCE PACK · DONE-FOR-YOU AUTOMATION

How we handle your data and keep you in control

Automation that can read your inbox or your customer records, and message your customers, needs clear limits. This pack sets out ours in plain English: what an automation touches, who can access what, when it needs your approval, what it records and how you switch it off.

Version 1.1 November 2026 For clients and prospective clients

1 In short

Nothing else to buy
We build, host and run your automations. You don't need an AI plan or any automation software of your own. They connect to the email, calendar and business tools you already use.

You approve what goes out
You approve every message wording before it goes live. Anything about money, prices or complaints waits for your OK. Nothing else acts on its own unless you agree it in writing.

Only what each job needs
We connect the tools each automation needs and nothing more. You get the full list of connections in writing.

An off switch
You can cut any connection yourself in about a minute, and we pause any automation as soon as you ask. We show you how at handover.

Every run logged and watched
Each automation records what it did, when, and who approved it. We monitor the runs and fix anything that fails.

Agreed in writing
Before we start you get a written scope and a data processing agreement under UK data protection law.

2 Who does what

Under UK GDPR, the roles are simple.

Who	Role	What it means
You, the client	Controller	You decide what your automations are for, which accounts it may use and who it may contact.
SalesFlowLab	Processor	We build and run your automations on your written instructions, under a data processing agreement signed before we start.

Who	Role	What it means
Services we use to run your automations Hosting, text messages, email and documents, and an AI service where one is used	Our sub-processors	They work for us, under our accounts and our contracts with them. Each is named in your agreement, and we tell you before adding a new one. Where an automation uses AI, for example to draft a reply, we use a business AI service (such as Anthropic's or OpenAI's) whose terms say your content is not used to train its models.

3 What an automation touches

We agree the list for your automations before we build. A typical setup looks like this.

Information	Why an automation needs it	Where it stays	Who can see it
Your rulebook	Your prices, policies, opening hours and approved message wording, so every message is accurate	Held by us to run your automations, with a copy for you	You. Us while we run it.
Email and calendar	To answer enquiries, send confirmations and reminders, and prepare a daily brief	Your Google or Microsoft account. We keep only what a run needs.	The automation, through access you can remove. Us while we run it.
Customer or booking records	Only the fields an automation needs, such as a name, a phone number and a booking time	Your CRM, booking system or spreadsheet	As above.
The run log	A record of what each automation did and who approved it	Our hosting, for a period you choose, then deleted	You and us. A copy is yours on request.

> Most automations follow fixed rules and use no AI at all. Where one drafts text with AI, we run it on our own business account, under terms that say your content is not used to train the provider's models, and we send it only the fields that job needs.

4 Who can access what

- **Hosted by us, your data in your tools.** Your automations run on hosting we manage. Your customer records stay in your own tools; we keep only the working copies a run needs, and the run log.
- **No shared passwords.** You sign in yourself to connect each tool, or give us a separate user or delegated access that you can remove at any time. We never ask you to send a password by email.
- **Least access.** Read-only wherever that is enough. Permission to send, book or change records is given only where you have agreed it for a named automation.
- **A written list.** You receive a list of every connection, what it can do and why it is there.
- **Only while we run it.** Our access lasts only while we run your automations. When we stop working together, we remove it and confirm in writing.

5 When it needs your approval

Before an automation goes live, you approve every message it can send, word for word. Anything that needs a judgement, such as a reply to an unusual enquiry or anything about money, works in **draft mode**: the automation prepares it and a person approves it before it is sent, booked or changed.

An automation acts on its own only where you agree it in writing, with limits such as:

- who it may contact, and who it must never contact
- how many messages it may send in a day
- the hours it may run
- what it must hand back to a person, for example any complaint, offer or legal question

> **How we run our own systems.** SalesFlowLab's own sales system follows the same model. It started in draft mode, with the owner approving every email. Since October 2026 it has sent routine emails on its own, on a schedule, under a standing approval the owner gave in writing. It works within fixed limits:
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> - a permanent do-not-contact list is checked before every draft and every send
> - daily caps limit how many new emails go out
> - a reply from a person stops the automatic follow-ups at once
> - prices, quotes and contracts always go to the owner first

6 The audit log

Each automation writes a short entry every time it runs: when it ran, what it read, what it produced, who approved it and what was sent. The log is kept on our hosting for a period you choose, and then deleted. You can ask for a copy at any time.

Sample entry FICTIONAL EXAMPLE

```
2026-11-12 09:14  automation: enquiry-reply   run: 0142
trigger:   new enquiry from a property portal (14 Elm Road)
read:      the enquiry email and the property record
produced:  a reply offering three viewing times
status:    waiting for approval
2026-11-12 09:21  approved by: J. Smith (lettings)
sent:      reply to the enquirer, 09:21
booked:    no (waiting for the enquirer to choose a time)
```

The agency, the address and the person are made up to show the format.

7 Switching it off, and if something goes wrong

- **Off switch.** You can cut any connection yourself in about a minute, and we pause any automation as soon as you ask. We show you how at handover, and the steps are in your written guide.
- **If something goes wrong,** such as a wrong draft or access that should not be there, we stop the automation first and fix it second.
- **Personal data incidents.** If we find a breach affecting personal information we handle for you, we tell you without undue delay, and in any case within 24 hours of finding it. We then help you decide

whether it must be reported to the Information Commissioner's Office, which for you as controller is normally within 72 hours.

8 At go-live, and when we stop working together

- At go-live you receive a recorded walkthrough, a written guide and your rulebook.
- If you stop, your automations stop at the end of the month you have paid for.
- We send you your rulebook, your approved message wording and your run log, then remove our access and confirm it in writing.
- We delete working copies of your information, keeping only what the law requires, such as contracts and invoices. Your customer records stay in your own tools throughout.

9 What we never do

- Sell your information, or use it for anyone else's project.
- Publish anything about your business, including a case study, without your written approval.
- Promise time savings. Results depend on your business, your tools and how the automations are used. We agree what each automation should do before we build it, and test it on your real work before it goes live.

10 Why this approach

SalesFlowLab was founded by Ahmed Razeen, who has 24+ years of corporate experience, including 12+ years in data governance, audit and analytics. That work involved audit readiness, access-risk monitoring and close work with Internal Audit, Cyber Security, Legal and Data Protection teams. The same habits shape every automation we build: know what it can see, decide what it may do on its own, and keep a record of what it did.

SalesFlowLab is a trading name of Ahmed Rifdhi Razeen, 61 Bridge Street, Kington, HR5 3DJ. Questions about this pack: **hello@salesflowlab.co.uk**.
This pack describes how we work. The binding terms for each project are in its written scope and data processing agreement.