



Cross Customer Insights Program FAQs

Don't we already have a contract with Planview?

Yes, but we value transparency and our relationship with you. While many organizations are not taking this step, we believe it is important in light of the heightened awareness of AI and questions around data handling in cross-customer benchmark scenarios.

As Planview undertakes research and releases features that leverage our collective customer data with artificial intelligence and machine learning, we will protect your data as we always have, complying with regulations, including GDPR, and ensuring data is encrypted both at rest and in transit. Furthermore, data is restricted to our own compute environments whenever possible. When a managed service (such as a large language model) is employed, we ensure Planview and customer data are legally protected and virtually segmented from all other users of the service. We also ensure that data is immediately discarded after the service responds and the outcome is delivered. We will also continue with our notification policy, where updates are made to existing data processors.

Moving forward, we are seeking input from customers as part of our ongoing privacy and security best practices.

How do I participate?

You do not need to take any further action to allow Planview to use your anonymized data for cross-customer feature creation.

Unless you signal your opt-out, it implies you have the authority to participate on behalf of your organization.

How does participation benefit me?

By participating, you can access features that deliver AI and machine learning-powered insights and benchmarks from across our customer data set, all within the Planview platform (the "Cross Customer Insights Program").

- Participation in the Cross Customer Insights Program will enable your use of data science-driven features that employ anonymized, cross-customer benchmarks and related analyses.
- If you opt out of the Cross Customer Insights Program, we will exclude your data from all data science-driven features and inner circles related to cross-customer data. Additionally, in this case, we will be unable to deliver any data science-powered benchmarks, data models, or features that leverage anonymized data to you within your use of the Planview Platform and its capabilities.

What if I don't respond?

As the Cross Customer Insights Program is provided on an 'opt-out' basis, we will include you in the program if you fail to expressly opt out within 30 days after the delivery of this notification.

Whom can I contact for more information?

Please reach out to ai-consent@planview.com