Privacy Policy

The Intentional Leadership Institute

Doing business as Carlson Young and Be Intentional

Effective date: November 21, 2026

1. About this policy

The Intentional Leadership Institute (“ILI,” “we,” “us,” or “our”) operates under the trade names Carlson Young and Be Intentional.

This policy explains how we collect, use, protect, retain, and disclose personal information through:

- Our websites, including beintentional.com and carlsonyounginc.com.
- The Be Intentional Academy.
- Leadership assessments and professional development programs.
- Coaching, consulting, workshops, and related communications.
- Marketing communications.
- Intentional Conversations and Professional Development Companion, our browser-based service planned for release by January 2027.

Our services are intended for adults age 18 or older. We serve clients and participants in the United States, Canada, and the United Kingdom.

2. Our commitment to confidentiality

Our work primarily involves C-suite executives, vice presidents, and senior leadership teams. We recognize the sensitivity of leadership discussions, assessment information, and private coaching relationships.

We protect confidentiality through written agreements, restricted access, participant permissions, and confidentiality and security requirements for our staff, coaches, and service providers.

Permission to share one category of information does not automatically authorize sharing another. Assessment information, private coaching notes, and app conversations are subject to their respective sharing arrangements.

We do not sell or rent personal information or disclose it to other organizations for their own marketing purposes.

3. Information we collect

Inquiries and consultation requests. When you contact us or submit a website form, we collect your name, email address, and the question or message you provide.

Program enrollment. We collect names, work contact details, job titles, and team assignments. You may provide this information directly, or your employer may provide it to arrange participation. We do not receive employer performance reviews as part of enrollment.

Assessment information. We receive assessment results, reports, and communication-style summaries used in the relevant coaching, consulting, or professional development program.

Coaching and professional development. We receive information you choose to discuss or provide during coaching, workshops, and related activities. With your permission, coaches may keep written session notes and participant action plans.

Recordings and meeting notes. When recording, transcription, or AI note-taking is used, the information handled may include audio, video, transcripts, summaries, and meeting notes, depending on the tool and session.

Academy and app accounts. We collect information needed to create accounts, provide access, communicate with participants, and support participation. Intentional Conversations also uses authorized assessment summaries, information entered during conversations, and generated guidance or plans.

Account security and operating records. Online services may generate records needed to operate the service, troubleshoot problems, and protect accounts. For example, Intentional Conversations keeps sign-in times and protected authentication records used to recognize authorized sessions. These records are separate from assessment results and conversation content.

Please include only information relevant to your inquiry or participation. Avoid submitting passwords, financial account details, or unnecessary private information about other people. In app conversations, use a role or general description instead of another person's name where practical.

4. How we use information

We use personal information to:

- Respond to inquiries and consultation requests.
- Enroll participants and administer programs.
- Deliver assessments, coaching, consulting, learning materials, and professional development services.
- Personalize guidance using information authorized for that purpose.
- Communicate about sessions, scheduling, accounts, and program materials.
- Maintain accounts, manage access, troubleshoot problems, and protect our services.
- Handle privacy requests and meet applicable legal and contractual obligations.
- Send marketing communications when you separately opt in.

We do not collect personal information for separate research or product development.

Submitting a website inquiry does not enroll you in marketing emails. Becoming a client does not automatically enroll you in marketing communications.

5. Assessments and client-sponsored programs

Assessment providers administer their own registration and release processes. ILI's use and distribution of assessment materials and results are governed by its signed licensing agreements with those providers.

When assessment results are released to the client company, the company determines its own internal access and distribution. ILI does not control how the client company distributes information in its possession.

Requests for ILI to send additional copies of assessment results should be made in writing and identify the intended recipient's name and email address. ILI handles those requests within its authority and applicable agreements. Participants may also share their own results directly.

The client decides whether to include assessment results or summaries in Intentional Conversations. The client provides a form identifying the participants and the assessments to be used. ILI follows those instructions. Sharing within the app remains subject to its individual permission controls.

Executive teams and other participants may receive pre-work and materials prepared for their group. ILI does not provide sponsoring employers with separate reports about individual attendance, completion, or progress.

6. Private coaching information

Coaches are not required to keep written session notes or participant action plans. When they do, they obtain the coached person's permission.

These records may be stored in ILI's Google Workspace or the coach's own system. Coaches must follow ILI's confidentiality, security, retention, and deletion requirements, including cooperating with privacy requests.

Private coaching records are accessible to the coach and authorized ILI executive staff supporting the coaching relationship. Sharing private coaching notes with an employer, client leadership team, or another outside recipient requires the participant's separate permission, except where disclosure is required by applicable law.

7. Recordings, transcription, and AI note-taking

We use Zoom, Fathom Video AI, and Granola for recording, transcription, or AI-assisted notes, depending on the session.

Our notification practices are:

- Zoom: Participants receive an on-screen prompt requiring them to click "OK."
- Fathom Video AI: Participants receive verbal notice and a visual announcement.
- Granola: Use is announced verbally.

If a participant declines recording or AI note-taking, we turn those functions off and the participant may continue attending.

Access to recordings, transcripts, and AI-generated notes and summaries is limited to the coach and authorized ILI executive staff, together with the service providers handling the information to supply those services.

Notes may be shared with participants in accordance with their written permission or request. Disclosure to an employer or client leadership team requires the participant's separate permission, except where required by law.

8. Intentional Conversations and Professional Development Companion

Intentional Conversations and Professional Development Companion ("Intentional Conversations") is a browser-based service intended to help participants prepare leadership conversations and support professional development.

It uses account information, authorized communication-style assessment summaries, conversation content, and generated guidance. Optional voice dictation handles audio the participant chooses to submit.

Participant control. Private conversation content is not shared with colleagues, employers, or client leadership without permission granted by the individual within the app. Assessment access and sharing are subject to the app's visibility permissions.

Operational handling. Relevant information is handled by providers supporting hosting, AI responses, account emails, and optional voice dictation. This operational handling is separate from sharing with colleagues or employers.

The providers identified by DIAL Systems include:

Provider	Purpose
DIAL Systems	App development, operation, and support
Contabo	Server hosting
Anthropic	AI-generated conversation guidance
Resend	Account and sign-in emails
OpenAI	Optional voice dictation

DIAL's November 2026 security overview identifies app hosting in France. Other providers may handle information in additional countries.

Anthropic and OpenAI state that information submitted through their commercial APIs is not used for model training by default. These statements concern those API services and should not be understood as a blanket description of every tool used by ILI.

App retention and deletion follow the applicable client-specific arrangements described in Section 11.

9. Service providers and other disclosures

We use providers to support email, file storage, scheduling, assessments, learning, digital signatures, invoicing, file transfers, meetings, website hosting, and app operations.

Depending on the engagement, these include Google Workspace, ActiveCampaign, Calendly, Xero, DocuSign, EzyCourse, Zoom, WeTransfer, Emergenetics, TKI, The Leadership Circle, DiSC, EQ-i, Fathom, Granola, Sites in ChatGPT, and the app providers listed above. Not every provider is used for every client or participant.

Providers handle information relevant to the services they supply. Their handling of information is governed by applicable agreements, service settings, and privacy terms. Providers may also generate security, operational, or de-identified information as described in their own terms.

We may disclose information with your permission or when required by applicable law or binding legal process. Confidentiality commitments do not eliminate mandatory legal obligations.

10. Websites and communications

Our website beintentional.com is hosted through Sites in ChatGPT. We plan to move carlsonyounginc.com to the same hosting service before the end of 2026.

The beintentional.com contact form requests a name, email address, and question or message. The designated contact address is info@beintentional.com.

We use inquiry information for communication and responding to the request. We seek a separate opt-in for marketing communications.

We do not currently use visitor analytics or advertising tools on beintentional.com. Hosting services may separately handle operating and security records. The absence of analytics or advertising tools does not mean that no technical information or cookies are used.

11. Retention, archives, and deletion

Current engagements. We retain relevant records for current clients and participants because earlier assessments and information may continue to inform coaching and consulting.

Former clients and departing participants. Our standard retention period is five years after the last client engagement ends. For an individual who leaves a current client's team or otherwise ends participation, the five-year period begins when that individual's participation ends.

If an individual resumes working with ILI, the five-year period restarts when the renewed participation ends. We obtain permission before reusing earlier personal information in a new engagement.

These rules apply to assessment records, program documents, coaching notes, participant action plans, recordings, and transcripts held by ILI or on its behalf. We retain information longer where applicable law or an applicable contract requires it.

Archives. Records may be moved to a restricted Google Drive archive. Only authorized ILI team members have access. Archived records are reviewed for possible deletion approximately every 18 months.

The IT Lead and COO coordinate retention and deletion across ILI's records, relevant coach-held copies, and services such as Zoom, Fathom, and Granola.

Written deletion requests. You may request deletion of your personal information, including archived copies, by writing to TechGuru@beintentional.com. We honor requests unless a legal or applicable contractual obligation requires retention, subject to applicable privacy law. We explain any limitation that prevents us from completing a request.

Intentional Conversations. The app follows its separate client-specific retention and deletion commitments, including end-of-engagement deletion where agreed. The five-year ILI archive period does not automatically apply to app records.

Removing access, archiving information, and deleting information are separate actions.

12. Security and access management

We use administrative, technical, and organizational measures intended to protect personal information. Our security requirements include restricted access, confidentiality obligations, multifactor authentication, current software, device encryption, and protection of account credentials.

Coaches must follow ILI's requirements for information held in their own systems.

ExFil has performed general security testing and assessment for ILI. DIAL states that the app's controls are designed against the SOC 2 Trust Services Criteria; DIAL has not completed a formal SOC 2 audit.

When client leadership reports that someone has left or completed a program, our Operations and IT Leads coordinate removal of the appropriate access.

No online service or security measure can guarantee protection against every threat.

13. International handling of information

ILI is based in the United States and serves participants in the United States, Canada, and the United Kingdom. Depending on the service, information may be stored, accessed, or used in a country other than the one where you live.

For example, a U.S.-based ILI coach may work with a participant in Canada or the United Kingdom. DIAL identifies France as the hosting location for Intentional Conversations. Other providers may handle information elsewhere.

Information held in another country may be subject to that country's laws and lawful government-access requirements. You may contact our IT Lead for information about the providers and protections relevant to your program.

14. Your choices and privacy requests

Contact TechGuru@beintentional.com to request access to, correction of, or deletion of your information, or to raise a privacy concern. Please submit deletion requests in writing.

Our IT Lead coordinates requests with relevant staff, coaches, and providers. We may need information to verify your identity and locate the relevant records.

You may withdraw permission for future sharing by ILI. We will stop future sharing and remove ongoing shared access that we control, subject to applicable legal requirements. We cannot necessarily recall copies already received by others or control information held independently by a client company or assessment provider.

Depending on applicable law, you may also have rights to obtain a portable copy, restrict or object to the use of information, or complain to a privacy regulator. Where we rely on consent, you may withdraw it without affecting the lawfulness of earlier use. Rights and exceptions depend on your location and the circumstances.

We respond within applicable legal time limits and explain any limitation on a request.

UK participants may contact the Information Commissioner's Office. Canadian participants may contact the Office of the Privacy Commissioner of Canada or the relevant provincial authority.

15. Automated decisions

We do not use assessment results or app outputs to make solely automated decisions that produce legal or similarly significant effects.

Assessment-based guidance and app responses support leadership learning and preparation. They do not replace the participant's judgment.

16. Testimonials, photographs, and logos

We do not routinely publish client or participant names.

We obtain specific written permission before publishing a testimonial, an identifiable photograph, a company logo, or associated identifying details.

17. Additional information and policy changes

A separate client-facing Cybersecurity Overview describes our general approach to protecting information. Additional security information relevant to an engagement is available on request and may be provided confidentially.

Information needed to understand our handling of personal information and exercise privacy rights is available without a confidentiality agreement.

We may update this policy as our services or practices change. The published version will show its effective date. Where required, we provide additional notice or obtain permission before introducing a new use of information.

18. Contact us

The Intentional Leadership Institute

Doing business as Carlson Young and Be Intentional

Attention: IT Lead — Privacy Requests

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