



Squadify AI Information

Introduction

Squadify is a SaaS platform which uses user-submitted data on team conditions to provide a report on team strengths and challenges. The data is supplemented by AI interpretations to set out clear insights for teams on key focus areas to improve teamwork and selected content to develop team capability and understanding.

Squadify Data

Squadify requires minimal personal identifiable information (PII) data – we only collect name and email address. This data enables us to connect an individual with a team so that we can generate team-level Squadify reports. Individual scores are never report or available to view.

In line with GDPR we retain the data only for as long as it is required to provide the products and services we offer. After that time, we anonymise all data so that users are not identifiable, but so that we can retain the data for analytics. We believe that we currently have the largest dataset on teamwork and team performance in the world which enables us to provide benchmarks and insights to Squadify users without compromising confidentiality of our users. We require users to give consent to using their data in our terms and conditions.

We do not provide any Squadify data for training external AI models. We ensure that all models we use are SOC II or ISO27001 compliant and meet industry standards of data security. We provide training to our staff to ensure that they understand the potential risks of providing client data to AI models and have built processes to prevent this.

AI Models

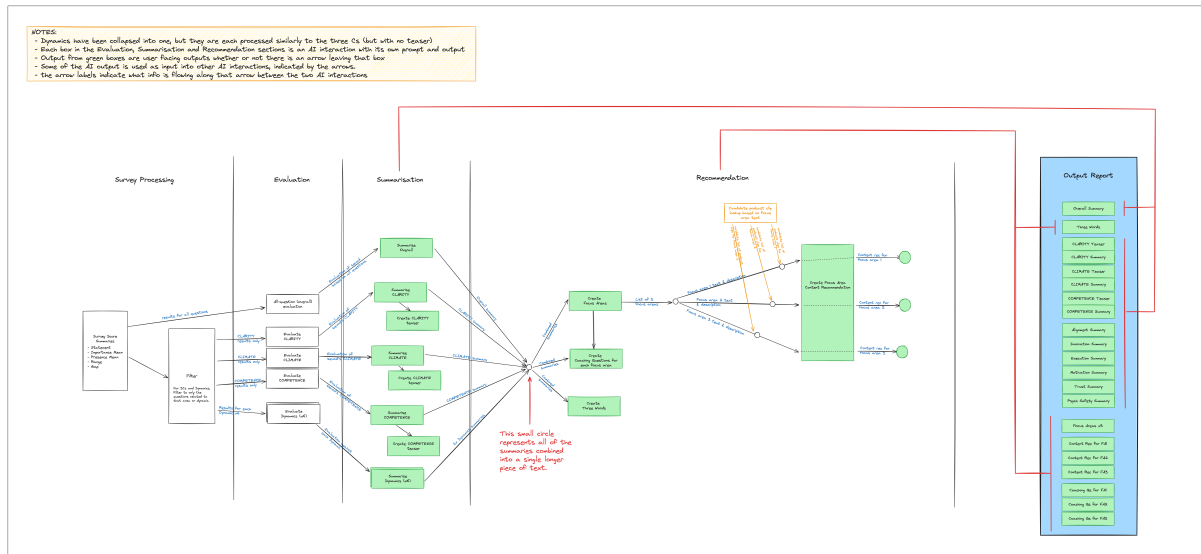
Squadify has been designed to leverage the most suitable AI models for each element of the AI analysis. This means that we can rapidly switch between models as new capabilities emerge to continually provide the best AI interpretation of the data. Models accessible to our architecture include: ChatGPT o1, o3mini, Claude, etc....

Squadify AI Architecture

We use a series of prompts to analyse the team-level data in a 3-step process to achieve the Squadify AI Report narrative and recommendations. These prompts include contextual information about the data such as how to evaluate team scores against population metrics and how to understand reporting categories. We also provide instructions about the role of the AI to provide observations and recommendations and the tone of voice for textual outputs:

- Step 1 – analysis of the data to identify high/low scores, greatest changes etc

- Step 2 – transform the data into text descriptions in the form of insights
- Step 3 – summarise the text into short ‘taster’ summaries



Technology

We use LangSmith as the platform for managing our AI development. This platform enables us to design, test, debug and monitor our application efficiently. LangSmith is a platform specifically designed to support development of LLM-powered applications, which enables us to track actions, and maintain logs for security and to rapidly identify and resolve issues in development.

EU AI Act

We assess that Squadify is classified as **limited** or **minimal** risk under the definitions of the EU AI Act. Within this context we are compliant with the requirements of this Act including:

- Transparency – we provide clear information on the platform that the report text has been generated by an AI model. We require consent from users to collect their PII.
- Data Privacy and Security – we are GDPR compliant and ISO27001. We use encryption to protect data at rest and in transit.
- User Rights – within our Data Management Policy we document all users rights including their right to privacy, and to access, delete or port their data.
- Third party management – we conduct due diligence on our suppliers and ensure that we use models and developers that are supported by high levels of data security
- Accountability and Documentation – we document the AI system design and testing and capture performance metrics.
- Data retention and deletion – aligned with GDPR we retain PII for the duration of a client license and for 3 years after in case they want to return to the Squadify platform and review their previous data. We have defined our retention period as 3 years so any account that is unused for 3 years is automatically anonymised and PII removed from our systems.
- Risk Management – we conduct regular risk assessments in order to identify and mitigate risks associated with the use of AI.

- External validation – we submit to a regular data security audits (we are ISO27001 certified) and Penetration testing.