

GDPR

How to prepare for
changes coming to
Mindmatrix in May, 2018



We'll review:

- What is GDPR?
- What changes should you expect in your Mindmatrix account by May 2018?
- What tasks should you complete before May 1st to be compliant?
- How is Mindmatrix going to ensure compliance for all clients by the 1st of May?
- What resources should you consult for best practices on how to be compliant with GDPR regulations?

What is GDPR?

What you need to know about GDPR

Def:

- A regulation about online communications that affects all clients or their contacts who have an origin in the EU and fall under GDPR. It applies to any company that offers paid or free services to users/contacts in the EU.
- Goes into effect May 25, 2018

Affects on software providers:

- Requires increased security and services for contacts that originate from within the EU for compliance purposes.

Affects on marketers:

- Must ensure any contacts with an origin in GDPR regions consented to receive marketing emails.
- Are responsible for ensuring they do not add contacts from GDPR regions have not consented to receive marketing emails.

What are the penalties for failing to follow the consent guidelines for contacts affected by GDPR?

The new regulation carries with it enforcement that could include up to:

- **Penalties worth 4% of your company's revenue for just one violation**

Due to the severity of penalties, we are requiring all of our clients to ensure they are protected by reviewing and updating their contact databases.

What are my responsibilities under GDPR?



Controller (You)

- Requires marketers like you to opt-in contacts for marketing emails if they originate in regions that require GDPR compliance.
- Requires you to only send emails to opted-in contacts if they are affected by GDPR.
- Show when those contacts consented to be a part of your campaigns



Processor (Mindmatrix)

- Enforces strict security policies such as: encryption of personal contact data by companies who do business with GDPR affected contacts.
- Must be able to show contacts what lists they are opted-into and allow contacts to request to be removed from our databases upon request.

I don't market to contacts in the EU. Do these changes still apply to me?

Yes.

To ensure you continue to have the best service, we are requiring all of our customers to update their contact records and verify whether or not those contacts must be GDPR compliant.

However, only those users with contacts who must be GDPR compliant must confirm those contacts have consented to receive marketing emails.

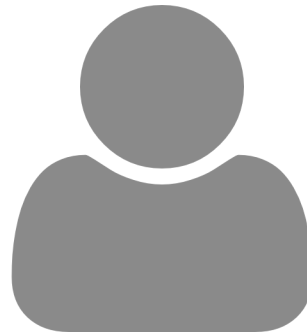
Policy & Software changes

What policy changes is Mindmatrix implementing due to GDPR?

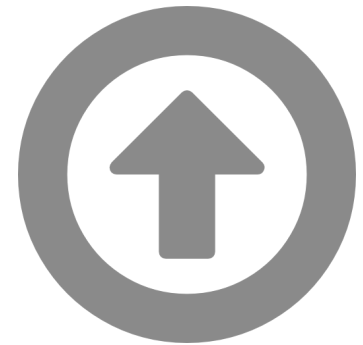
Whether you are a client from within the EU or a non-EU client, there are several policy updates taking place between now and May 1st that will change the way you can manage your contact lists in Mindmatrix.



1. Revised policies for personal data management roles and responsibilities of each entities with limits on personal data



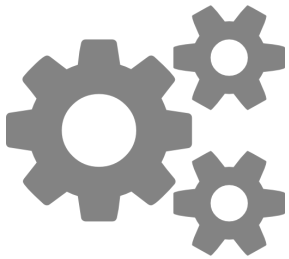
1. All contacts must be identified as EU vs non-EU by May 1st.
2. EU contacts must consent to receive marketing emails from you



1. Changes with the types of data you are allowed to store in Mindmatrix
2. Lists may no longer be imported on your behalf without required origin data completed

What software changes should you expect?

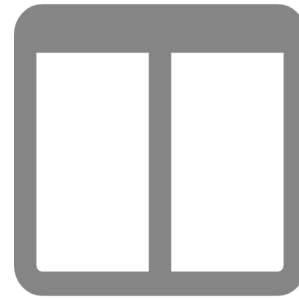
We are taking further steps to secure data in Mindmatrix and are asking you to confirm details about your contacts.



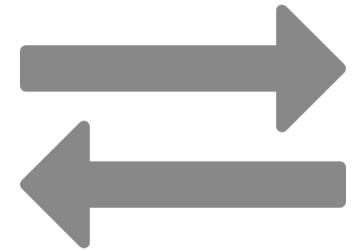
1. Encrypting all personal contact data in our databases and in transit
2. Update to our website tracking codes to let contacts know they are being tracked.



1. Adding language to all of our landing pages so contacts know they are opting-in to receive emails from your company.



- A public form where Users may request:
1. Details about marketing lists they have opted into
 2. Permanent removal from our databases



1. No exporting of contact data directly from the Mindmatrix application
2. No importing of personal contact data into Mindmatrix

New user agreements

Starting the first week of May:

- Upon login, all users will be asked to sign updated agreements
- Compliance language will be added to all landing pages created using Mindmatrix
- Our GDPR compliance policy will be available to view on the Mindmatrix website
- Additional links will be added to the global footer and bottom of all of our landing pages with additional features required for compliance with GDPR

The image shows a screenshot of a digital agreement form. The top section is titled "Terms of Use Agreement" and contains a scrollable area with "STANDARD TERMS AND CONDITIONS" for "MindMatrix". Below this is a checkbox labeled "I have read the above". The bottom section is titled "User Agreement" and contains a scrollable area with "TERMS AND CONDITIONS" for "MindMatrix". Below this is a checkbox labeled "I agree to the terms of the service". At the bottom right, there are two buttons: "Decline" and "Accept". A large, diagonal watermark reading "DRAFT" is overlaid across the center of the form.

How can you be
compliant?

How should you get started with compliance?

Here is a general process that you should follow to help you get organized ahead of the May 1st deadline.



Divide your list by origin:

1. Have you added any contacts that are from the European Union?
2. Do you have contacts that are just from the United States?

Verify:

1. Has the contact **consented** to receive marketing communications from your company?

If you identify any EU-origin contacts who have **not consented**, it's time to start asking permission to send them marketing emails.

Receive **confirmation in writing** that the contact has **consented** to receive emails from you.

Once the client opts-in, update your contact database with a flag for "Opted-in".

Step 1 - Reviewing your list

01

Review your contact lists to identify any contacts affected by GDPR

- **Contacts from GDPR affected regions**
- You will want to exclude these contacts from email campaigns if they do not opt-in.

02

Segment and tag your list and mark GDPR originating contacts vs non-GDPR affected contacts

- **It's extremely important you identify any EU contacts!** If you can't tell for sure, it is better to remove this contact from Mindmatrix.
- Failure to properly identify an EU contact and emailing them without verifying their consent can result in heavy fines!

Step 2 - Giving contacts a chance to consent

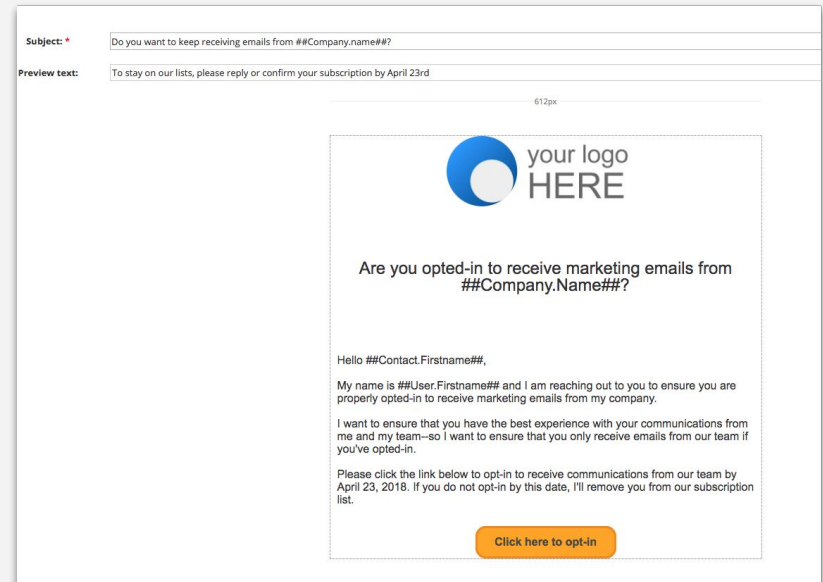
01

Email any GDPR affected contacts that have not opted-in by mid-April

- **GDPR affected contacts will have until the end of April to consent to receive emails from you.**
- This should provide you with enough time to guarantee they wish to receive your marketing emails.

To help you with this we are adding:

- **Contact templates** to our Support desk for you to download.
- **An email template** we recommend you send to your contacts so they opt-in ahead of the deadline.



Allowing contacts to consent and updating them via an imported list

You have a few options to start becoming compliant:

1. **Export your list** from Mindmatrix
2. **Review your list** and add a column for consenting records
3. **Update a column in your list to confirm the record has consented to receive marketing emails from your company.** Otherwise, unsubscribe the record.
4. **Reimport the list** into Mindmatrix.

Requesting consent from your contacts via email campaign

You have a few options to start becoming compliant:

1. Send an email campaign from Mindmatrix. This campaign will-
 - a. **Require all contacts to confirm they have consented** to receive marketing emails from your company
 - b. **Require contacts to confirm by April 23rd**, or they will be removed from your list in Mindmatrix or unsubscribed.
 - c. **Update your database the following week** to make the May 1st deadline for compliance.

Step 3 - Updating your list in Mindmatrix

01

Start updating your list in Mindmatrix

- **Complete a mandatory field confirming a contact is/is not GDPR affected**
- If a contact is from a GDPR affected region, update the verified as “opted-in” field

To help you with this we are adding:

- **A mandatory field identifying GDPR affected vs non GDPR affected contacts**
- **An email template** we recommend you send to your contacts so they consent ahead of the deadline.

Compliance Wrap-Up

- Review your contact lists
- Mark any contacts who are covered by GDPR vs non-GDPR affected clients
- If any contacts are affected by GDPR, verify they have consented to receive emails from you in writing or by completing a form.
- If a contact is affected by GDPR and has not consented to receive emails, reach out to them and receive opt-in confirmation ahead of the May 25th deadline
- Update your final list in Mindmatrix

What other changes could I see to my contact database?

Subscribers in your database have more rights about what lists they are subscribed to and what emails they should receive:

1. Contacts have a right to request information about what campaigns they are subscribed to
2. Contacts also have the right to request to be deleted from a database

Mindmatrix is implementing a process where contact(s) may complete both of these actions as well as a report where you will be able to see any request(s).

How does Mindmatrix's removal process work?

If your contact asks to be removed from your database or information about the campaigns they are subscribed to, this is how Mindmatrix will handle their request:

Contacts may submit a request via a secure form on Mindmatrix's website.

Mindmatrix will email information back to the contact in our database that submitted the request.

If a contact requests to be deleted, Mindmatrix will purge the record from our database.

Contacts may ask

1. To be deleted permanently
2. To be see information about all of the campaigns they are subscribed to

Requests for information may only be sent directly to the contact record listed in the Mindmatrix database.

This keeps the information secure.

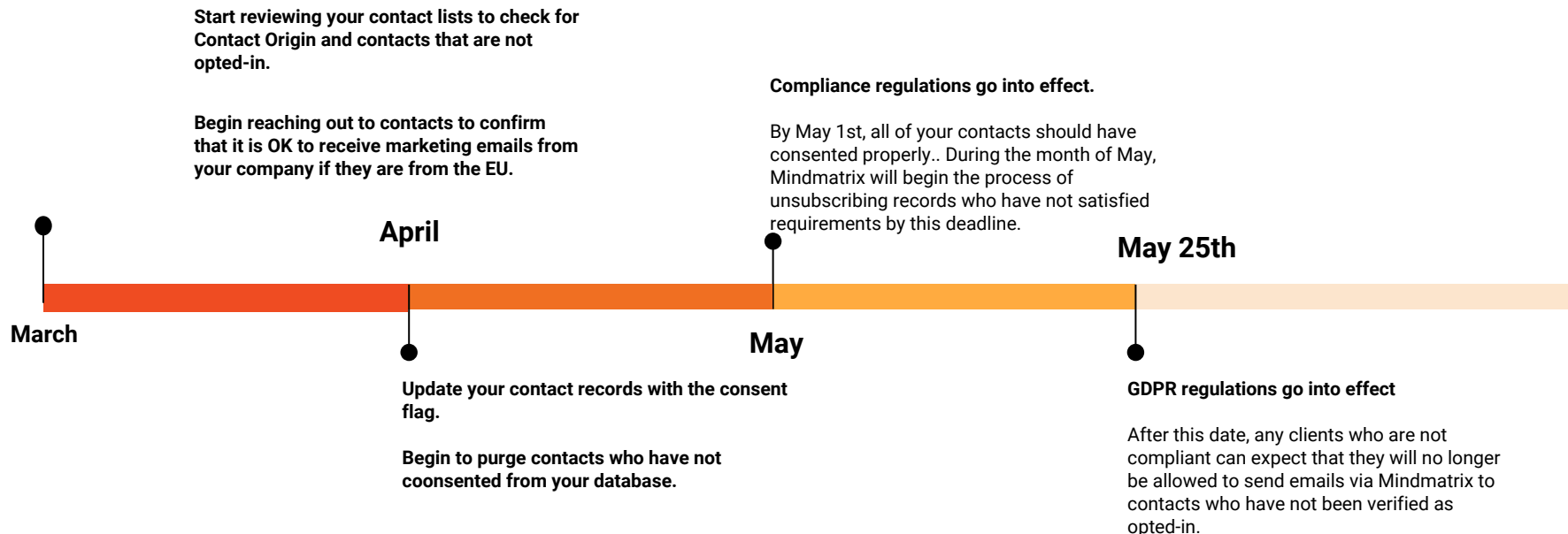
If a contact requests to be deleted, Mindmatrix will purge this record from our database.

You will be notified if a record you own is purged.

How can you plan for
changes?

We created a timeline to help you plan updating your database before May 1st

This timeline provides a general guide for you to follow to ensure compliance with GDPR regulations.



What happens if you
are not compliant by
May 1st?

What happens if you are found to be non-compliant by the deadline?

- **You will no longer be able to send emails via Mindmatrix until you update your database.**

All email marketing or outgoing campaigns in your account will be stopped.

- **Certain features in Mindmatrix will become inaccessible.**

With new agreements in place, Mindmatrix will disable either access to your account or features that require contacts/emails in the software.

- **You will still need to review your contact database and update it to be compliant.**

We will still make it possible for you to become compliant. You will have to sign the new compliance agreement to access your contact records and remove non-opted in contacts.

Summary

- Segment your lists by GDPR vs non GDPR contacts
- Unsubscribe non-opted in contacts with GDPR origin
- Expect to sign new compliance agreements with Mindmatrix
- Going forward, make sure you have a plan to only add opted-in lists and contacts who consent
- To find more information on GDPR, find free resources at: <https://www.eugdpr.org/>

Questions?

Email support@mindmatrix.net if you have any additional questions.