GDPR

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

We'll review:

- What is GDPR?

- Does GDPR effect you?

- What changes should you expect in your Mindmatrix account during the month of May?

- What tasks should you complete before the May 25th deadline to be compliant?

- How is Mindmatrix going to ensure compliance for all clients before the end 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: General Data Protection Regulation - effecting all EU origin contacts.

- A regulation about online communications that effects 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

Effects on software providers:

- Requires increased security and services for contacts that must be GDPR compliant.

Effects on marketers:

- Must ensure any contacts with an origin in GDPR effected 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 makes GDPR different from previous regulations?

Contacts with origin in the EU could file complaints against a company, regardless of that country's origin.
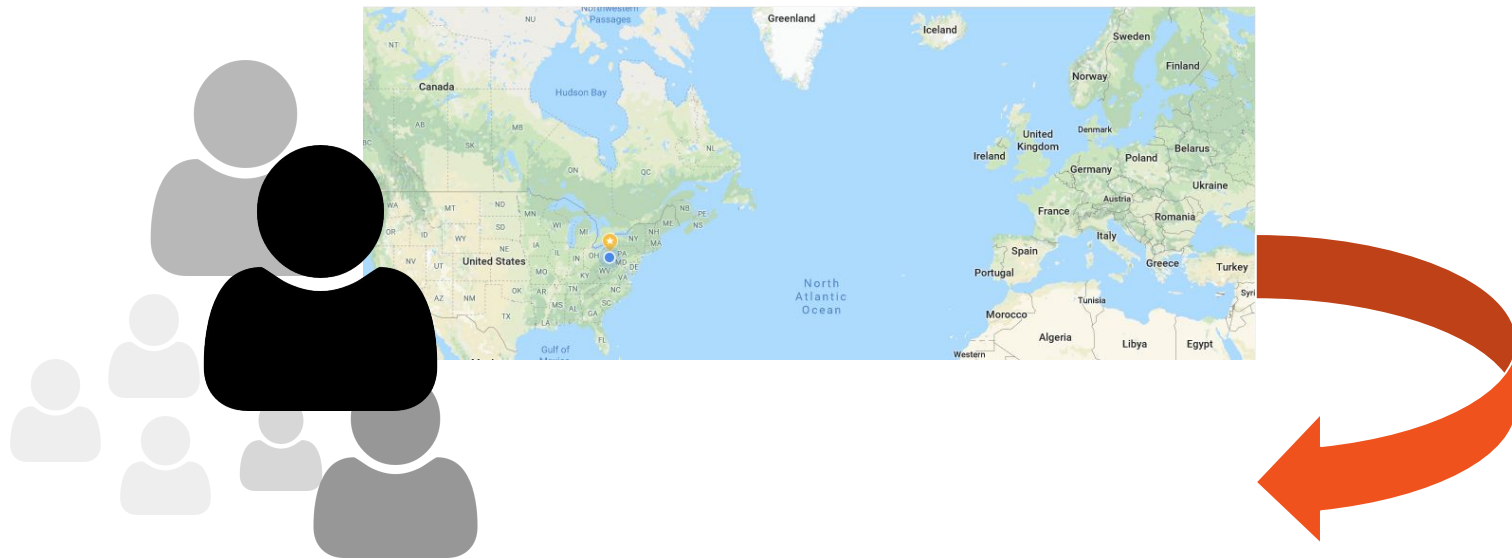
Countries within the EU (2018)

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 asking all of our clients to review their contact lists.

However, only those users with contacts who must be GDPR compliant should update optional fields in the contact record.

What are the penalties for failing to follow the consent guidelines for contacts effected 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 asking all of our clients to review their lists and ensure they properly capture consent of any contacts covered by GDPR.

What are my responsibilities under GDPR?

Controller (You)

- Requires users like you capture consent for all 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 effected 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 effected 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. **(Right to be forgotten)**

Policy & Software changes before 25th of May

# 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 25th 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. Any contacts the fall under GDPR regulations should be identified and consent should be captured.
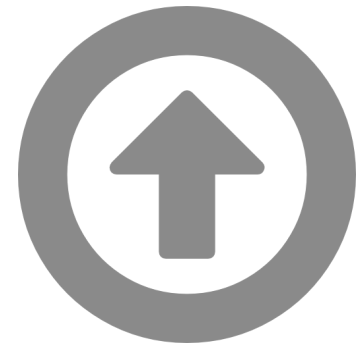
1. Lists may no longer be imported on your behalf **without** our fields included for Requires GDPR consent (even if left empty).

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.
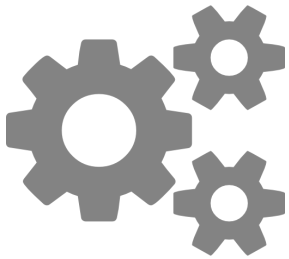
1. Encrypting all personal contact data in our databases and in transit

2. Updating our website tracking codes to let contacts know they are being tracked

1. Adding langauge to all of our landing pages so contacts know they are consenting to receive emails from your company.
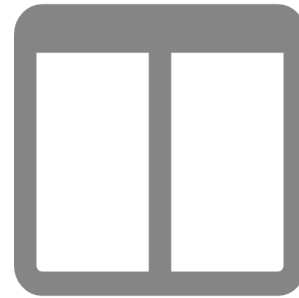
A public form where contacts may request:

1. Details about marketing lists they are subscribed to

2. Permanent removal from our databases
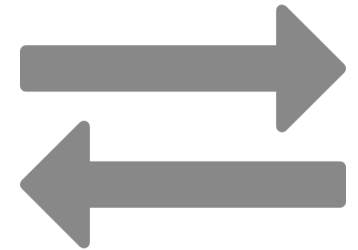
1. No exporting of contact data directly from the Mindmatrix application

2. No importing of personal contact data into Mindmatrix

New user agreements

By the May 25, 2018 deadline:

- Upon login, all users will be asked to sign updated agreements

- Compliance langauge will be added to all landing pages created using Mindmatrix

- There will be new user and contact-facing agreements covering CRM integration, email and landing pages in the software

How can you plan for changes?

We created a timeline to help you plan updating your database before May 25th

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

Start reviewing your contact lists to check for GDPR effected contacts.

Are contacts from GDPR effected regions?

Have GDPR effected contacts consented?

Double-check that consent and origin details are updated in your Mindmatrix account.

Work to ensure consent by the May deadline, all of your contacts should have consented properly.

April

May 25th

Early May

Update your contact records their GDPR status or consent details.

Ensure you can prove consent in case of a challenge.

GDPR regulations go into effect

Before this date, you must ensure all GDPR related contacts:

1. Consent to receive emails
2. Consent recorded in Mindmatrix

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 deadline.

| Review your list to confirm the **Origin** of your contacts. | Confirm contacts from the GDPR effected regions may receive emails. | Give non-conseting contacts a chance to consent if they are effected by GDPR. | Reach out to effected contacts to cofirm you have their consent. |

Divide your list by origin:
1. Have you added any contacts that are from a GDPR effected region?
2. Do you have contacts that are from non-GDPR effected regions?

Verify:
1. Has the contact *consented* to receive marketing communications from your company?
2. Can you prove consent?

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

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

Once the client consents, update your contact database in your CRM, lists, and Mindmatrix.

Step 1 - Reviewing your list

01

Review your contact lists to identify any contacts effected by GDPR

- **Contacts from GDPR effected regions**
- You will want to exclude these contacts from email campaigns if they do not consent to receive marketing emails from your company.

02

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

- **It's extremely important you identify any EU (GDPR effected) contacts!** If you can't tell for sure, it is better to remove this contact from Mindmatrix.
- Failure to properly identify a GDPR effected 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 effected contacts that have not consented to request their consent

- **GDPR effected contacts will have until mid-May (recommended) to consent.**
- This should provide you with enough time to gaurantee they wish to receive your marketing emails before the deadline.

To help you, we have added:

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

Sign up to continue to receive marketing emails from

Your company name here

We want to ensure that it is OK to continue emailing you.

First Name	*
Last Name	*
Company	*
Email	*
Country	*

How can you update your lists in Mindmatrix with origin and consent details?

Update options

Update records via:

1. Lists (Manual import)

2. By email campaign/landing page form*

*There is an optional email template and landing page we are offering at support@mindmatrix.net for all clients to send to any contacts to capture consent.

Updating via Import 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. **Download our contact templates from our Help Desk.**

4. **Update a column in your list to confirm the record has consented to receive marketing emails from your company.** Otherwise, unsubscribe the record.

5. **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. **Request recipients to confirm they have consented to receive marketing emails**

    b. **Ask contacts to consent by May 25th**

    c. **Automatically update your database before the deadline to confirm compliance**

Step 3 - Updating your list in Mindmatrix

03	**Start updating your list in Mindmatrix**

- **Complete an optional field confirming a contact has consented**
- If a contact is from a GDPR effected region, update the "Requires GDPR compliance" field

To help you with this we are adding:

Contactype	Requires GDPR compliance	How did they consent?
Prospect	TRUE	Contact Form Fill
Prospect	FALSE	Landing Page Form Fill

- **Two optional fields -**

    - **Requires GDPR Compliance (checkbox)**

    - **How did they consent? (text)**

- **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 effected contacts

- If any contacts are effected by GDPR, verify they have consented to receive emails from you in writing or by completing a form that captures consent.

- If a contact is effected by GDPR and has not consented to receive emails, reach out to them and receive consent confirmation ahead of the May 25th deadline

- Update your final list in Mindmatrix

What rights will my contacts have by the May 25th deadline?

Subscribers may ask to be removed

Subscribers in your database have more rights under GDPR regulations:

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 your database

Mindmatrix is implementing a process where contact(s) may complete both of these actions.

What happens if one of my contacts asks to be removed?

Mindmatrix would need to honor their request. Below is the process we are going to implement by May 25th.

Contacts may submit a request via a secure form.	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.

Should you worry about conversions with these new regulations?

Will being compliant hurt my bottom line?

- **The short answer is NO.**

 If you know where your contacts come from you can target them better and studies show that this increases your chances of converting leads to customers.

- **Contacts that consent to receive emails from you are more likely to open them and become new business.**

Improve your company's reputation and probability of closing sales by making sure that you ask your leads to consent to your marketing communications.

This reduces the odds that your marketing emails will be marked as spam, increases your open rates and improves the results of your marketing efforts.

What happens if you are not compliant by the May deadline?

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

- **You may need to pause your email campaigns.**

Mindmatrix will not stop your campaigns, but you may want to log into your account and stop them on your own while you update your records.

- **Your admin may disable certain features.**

If you are in a Partner program for example, your account admin may decide to roll back permissions to turn off email sending to give you more time to update your records.

- **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-consenting in contacts.

Wrap up

Summary

Action Items

1. Review your lists and check for GDPR effected vs non-GDPR contacts

2. Start reaching out to any GDPR effected contacts to capture their consent

3. Update your lists in Mindmatrix

Review Resources

- To read more information on GDPR, find free resources at:

  https://www.eugdpr.org/ and

  https://www.eugdpr.org/more-resources-1.html

- http://www.mindmatrix.net/gdpr-compliance/

- Review our contact templates here:

  http://my.mindmatrix.net/index.php?/Knowledgebase/Article/View/299/0/

  msp-advantage-contact-delivery-method#gsc.tab=0

Questions?

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