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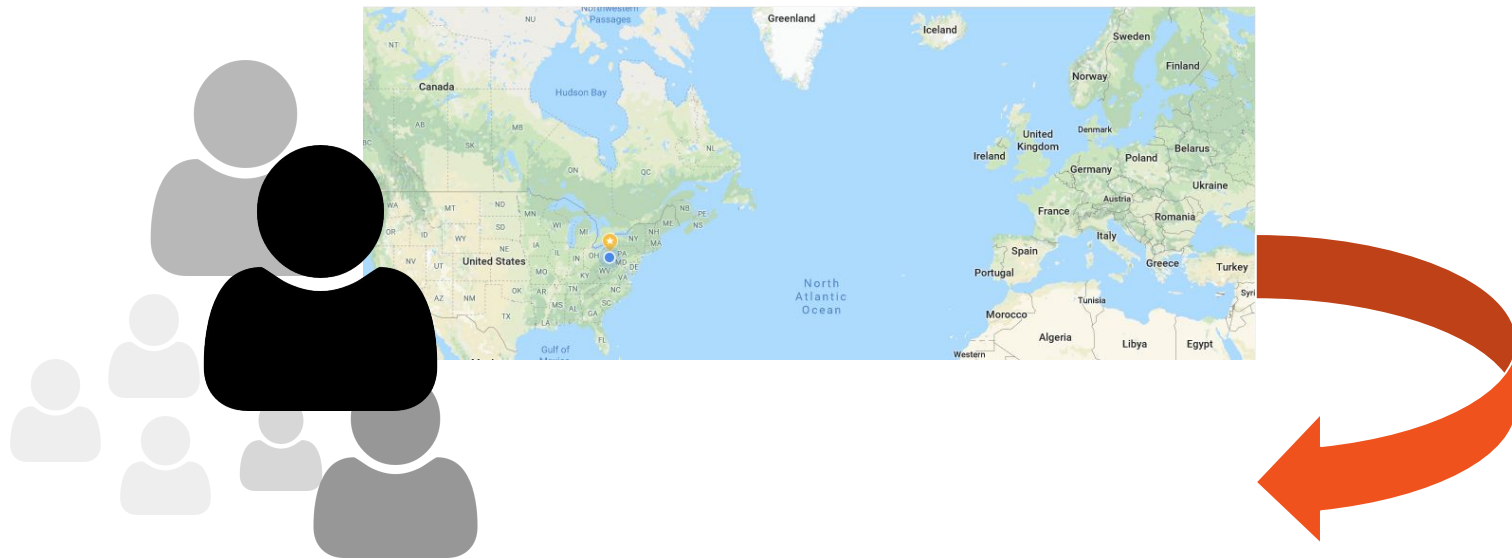
- Requires increased security and services for contacts that must be GDPR compliant.

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 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.

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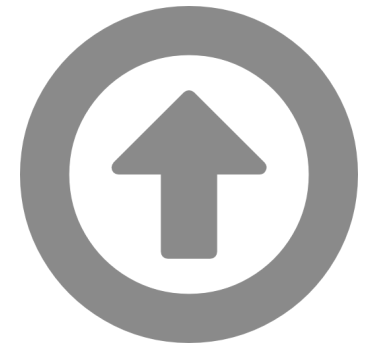
1. Revised policies for personal data management roles and responsibilities of each entities with limits on personal data

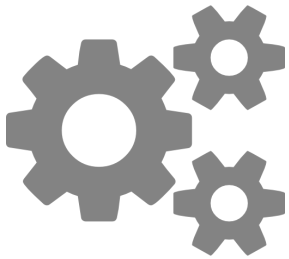1. All contacts must be identified as GDPR effected vs non-GDPR effected **before** the May deadline.

2. effected contacts must consent to receive marketing emails from you

1. Lists may no longer be imported on your behalf **without** required origin data completed
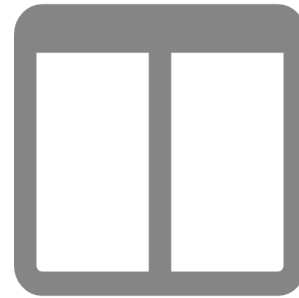
What software changes should you expect?

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. 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 opting-in 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

Starting in May:

- 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

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 clients have:

Origin properly marked as GDPR region or non-GDPR region

If they are from GDPR regions, have they consented to receive emails from your company? Can you prove it?

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 opts-in, update your contact database with a flag for "Consented".

You can use this update data in 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!
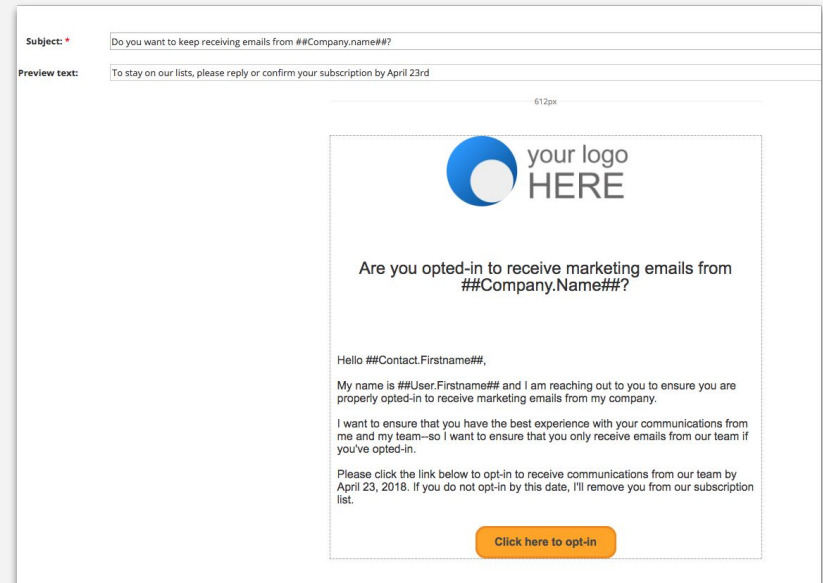
Step 2 - Giving contacts a chance to consent

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, this month 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 consent ahead of the deadline.

Subject: * Do you want to keep receiving emails from ##Company.name##?
Preview text: To stay on our lists, please reply or confirm your subscription by April 23rd

612px

your logo
HERE

Are you opted-in to receive marketing emails from ##Company.Name##?

Hello ##Contact.Firstname##,

My name is ##User.Firstname## and I am reaching out to you to ensure you are properly opted-in to receive marketing emails from my company.

I want to ensure that you have the best experience with your communications from me and my team—so I want to ensure that you only receive emails from our team if you've opted-in.

Please click the link below to opt-in to receive communications from our team by April 23, 2018. If you do not opt-in by this date, I'll remove you from our subscription list.

Click here to opt-in

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

Update options

This month, we'll provide details about mandatory fields, contact templates, and an email/landing page you can use to update your contact records with consent and origin details.

In the coming weeks, you will have the option to update records via:

1. Lists (Manual import)

2. By email campaign/landing page form

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. **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 consent by May**

    c. **Update your database before the deadline to confirm compliance**

Step 3 - Updating your list in Mindmatrix

03   **Start updating your list in Mindmatrix**

- **Complete a mandatory field confirming a contact is/is not GDPR effected**
- If a contact is from a GDPR effected region, update the verified as consented field

To help you with this we are adding:

- **A mandatory field identifying GDPR effected vs non GDPR effected contacts to Mindmatrix (you will receive a communication about this)**

- **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 captured 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 opt-into your 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 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 may 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-consenting in contacts.

Wrap up

Summary

Action Items

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

- Start reaching out to any GDPR effected contacts to capture their consent

Plan over the next 30 days

- Work with your sales and marketing teams to ensure that you have a process in place to track origin of contacts and capture consent

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/

What should you do next?

1. **Review your contact database** to see if you have any contacts who would be effected by the GDPR regulations.

2. **Look out for an email from our team over the next few weeks** with instructions you should follow to prepare for changes due to GDPR.

3. **Think about a process where you can capture the origin of any contacts in your database** on basis by the May deadline.

Questions?

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