

STEP BY STEP GUIDE

The GDPR Handbook for B2B Marketers

Don't wait on your legal team.
Here's what you can do right now to get ready for GDPR.

The GDPR Handbook for Impatient Marketers

GDPR brings drastic changes to how marketers must operate.

It disrupts a number of the well-worn marketing approaches that we've been doing for decades, and some of the newer practices that have allowed marketing innovators to grow fast.

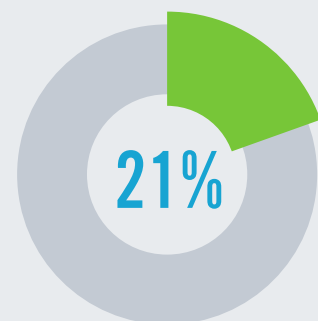
Adapting to these changes may come as a shock to many marketers, but the risks are huge if companies don't comply: fines of up to €20M or 4% of annual revenue, whichever is greater.

B2B marketers face different rules for B2C marketers, that mean that in some instances, legitimate interest can be applied and opt-out regime can be followed.

But opt-in consent is still required for many EU countries and businesses. As a result, marketers will almost certainly have to follow a consent regime for at least a portion of their contacts.

Only 21% of middle managers across the UK, US, Germany and Australia believe they are ready for GDPR.

SOURCE: CLEARSWIFT



IN THIS HANDBOOK

We've compiled this handbook to guide you through the murky waters of consent under GDPR, and three areas you can start tackling right now to prepare for the 25 May deadline:

1. Recording and storing consent data
2. Capturing consent by channel
3. GDPR-proofing your outbound tactics



“GDPR is a unique opportunity for business transformation and to forge new relationships with customers based on trust.”

RACHEL ALDIGHIERI | MANAGING DIRECTOR, DMA

1. RECORDING AND STORING CONSENT DATA

What to do with existing data

What has changed?

After May 25 2018, you may* no longer be able to freely ‘market’ to your database unless they have actively opted in and agreed to receive communications from you.

What does this mean to marketers?

Contacts processed under the consent regime will need to have explicitly opted in, by channel, and a record of this has to be date stamped and recorded in your CRM (or equivalent database). This goes for new and existing contacts, and in some instances may include customers too.

What should you do?

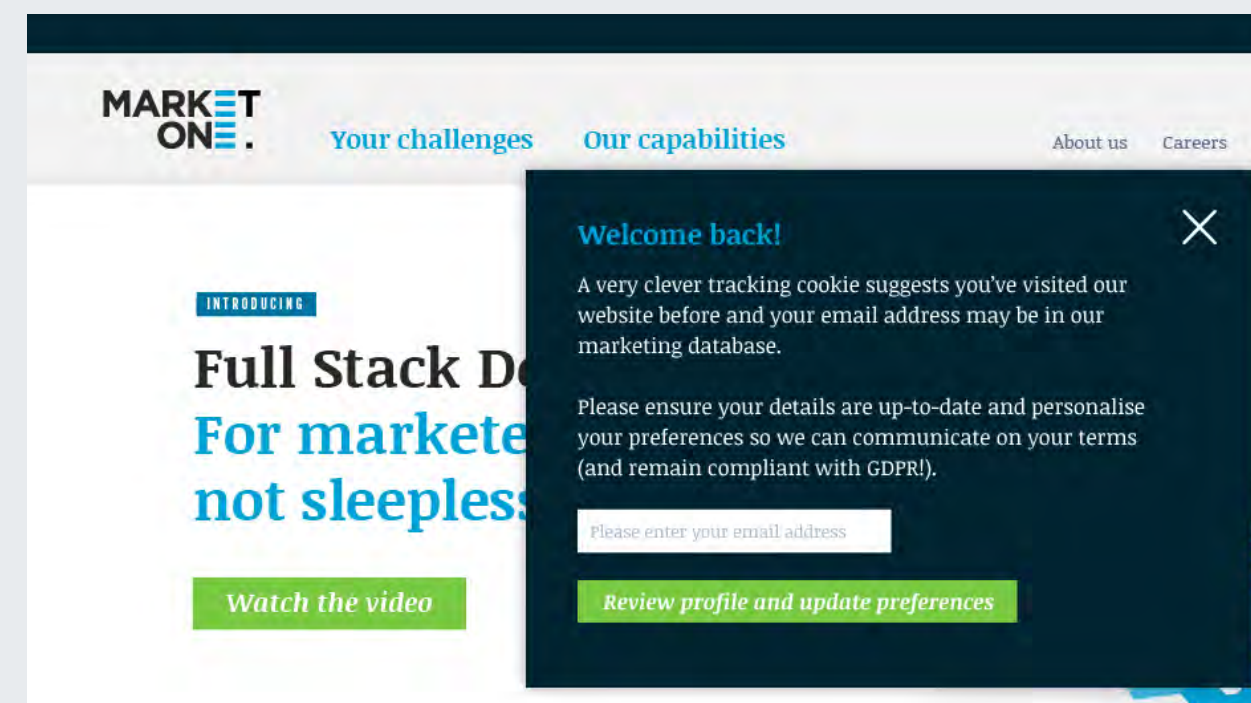
Try to opt in as many people as you can within your existing database before May 25, while it is still acceptable to communicate with non-opted-in contacts (never contact your unsubscribed contacts, though!).

First you’ll need to evaluate the state of your data. Conduct an audit to assess how many contacts have already given consent, to what, and how

*If your business has chosen an opt-in consent regime as its basis for processing data. An opt-out regime under legitimate interest can be applied to corporate subscribers in some EU countries.

recently. Then you can decide where you need to focus your opt-in efforts.

Now is the time to ramp up your subscriber numbers. Run re-engagement email campaigns, implement website pop-ups, and hit the phones to get as many people’s consent to be contacted as possible.



Use pop-ups on your website as another way to gain opt-ins before and after the GDPR deadline.

Post-GDPR, if you are using a consent regime as your basis for processing data, you shouldn’t contact your non-opted-in database for marketing purposes. Running a one-off re-engagement campaign focused around a preference center may be acceptable.

Where to keep consent data

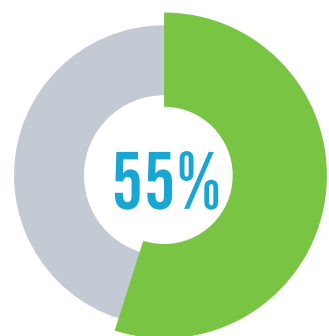
What has changed?

All new contacts must have their consent preferences saved in a central place – think of this as a ‘digital consent certificate’. This then means that you must have fields within each contact record specifying the kind of consent they have given (by channel) and the date that they consented.

What does this mean to marketers?

For new outbound contacts, generated at events, third-party opted-in lists, or tele prospecting, it’s very important that this consent is captured in the contact record.

Consent shouldn’t be assumed to last forever, either. You also need to make sure that the contact has opted in relatively recently, or check that they still want to remain opted in if they’re not engaging.



55% of UK consumers say they would ask a company what information is stored about them.

SOURCE: EMARKETER

What should you do?

It’s a good idea to run re-engage campaigns (by channel) every 6-12 months to unengaged opted-in contacts. Your goal here is to wake up sleepy contacts and remove the rest from your contact list for that channel until they engage of their own accord.

In addition to keeping your database GDPR-compliant, these practices have the added benefit of clearing dead contacts from your database that probably shouldn’t be in there in the first place. Result? A much more marketable data universe!

RECORDING AND STORING DATA: THINGS TO START DOING RIGHT NOW

- Audit your existing database to find out how many contacts you have consent for already.
- Run opt-in campaigns to your non-opted in contacts to capture as much consent before GDPR deadline as possible.
- Set up the right fields in your CRM to make sure you can capture consent data by channel and date.

2. CAPTURING CONSENT BY CHANNEL

What has changed?

Though it may seem like a simple yes or no, opt-ins can be granular and one individual contact can have several different consent preferences.

What does this mean to marketers?

Under a consent regime, you'll need explicit opt in per channel (email, phone, SMS). It is good practice to gather consent per purpose of the communication too (for instance: newsletters, product information, and event invitations).

In practical terms, this will mean that you shouldn't call a contact who is only opted in to receive email, and vice versa.

When you have the option, you can use legitimate interest as your basis for processing data for one channel, and use consent for another. For instance, you could use legitimate interest (where it applies) to conduct outbound calling on an opt-out basis, but use opt-in consent for email marketing.*

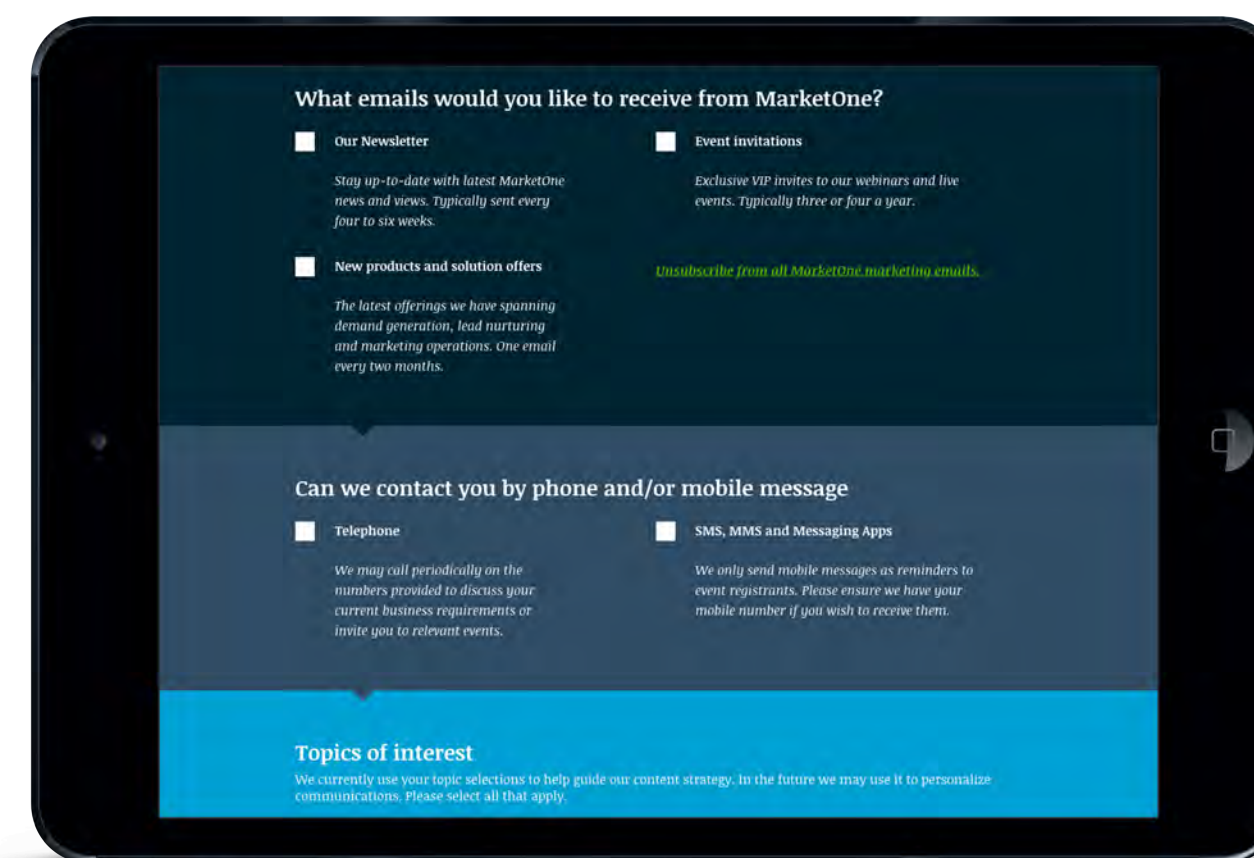
What should you do?

You should review your consent capture methods and get a plan in place to make sure you're capturing consent correctly by channel when it is required.

*This must be decided and documented before 25 May 2018 and outlined in your company's privacy policy. Once you decide which basis you are processing data under, you cannot change it.

A best practice would be to use your first touch to gain opt-ins for your other channels and topics, too.

The following pages will help guide you through how you can capture consent online, at events, and via telephone.



Your preference center should provide options to opt in or out by channel and topic.

Capturing consent online

Changes you'll need to make to your website ahead of GDPR fall into three categories: *messaging*, *data capture*, and *preference settings*.

1. Get the messaging right

Firstly, your privacy policy will need to be updated (this is the job of your legal team or your GDPR consultants), but you'll also need to make sure your web and digital assets are updated to reflect this.

The updates to your privacy policy should include clear language around what type of information is being captured on the website, and how the information is being processed.



“You may not be able to get consent to GDPR standards, but you do need to let people know what you are doing, why, and let them make choices.”

STEVE HENDERSON COMPLIANCE OFFICER, COMMUNICATOR

2. Update your data capture

Under a consent regime, all forms on landing pages and on your main website need to have the option to give explicit consent to receive any additional communications.* A best practice is to use binary (yes/no) tick boxes or radial buttons - but with neither ticked by default.

You also need to include copy to explain clearly what you are asking individuals to consent to and for how long (this copy should be written, or at least reviewed, by your legal team).

Make sure you don't include too many fields on your forms. You should be able to justify why you've collected each piece of personal information, so you'll need to think carefully to decide which fields stay and which fields go.

3. Enable changing preferences

Finally, you'll need to update (or create) your preference center to ensure it has options to opt in or out by channel, set contact frequency, edit contact details, and access, change or delete personal data. It's a great idea to include a *Snooze* option in your preference center, enabling contacts to pause communications for a while instead of unsubscribing permanently.

Please confirm the email address you wish to unsubscribe:

Email

Unsubscribe **Snooze**

No more emails, ever. Pause for six months.

* If you are processing any data under an opt-out regime, do not display explicit opt-in options to these contacts, as it could invalidate your legitimate interest basis.

Capturing consent at events

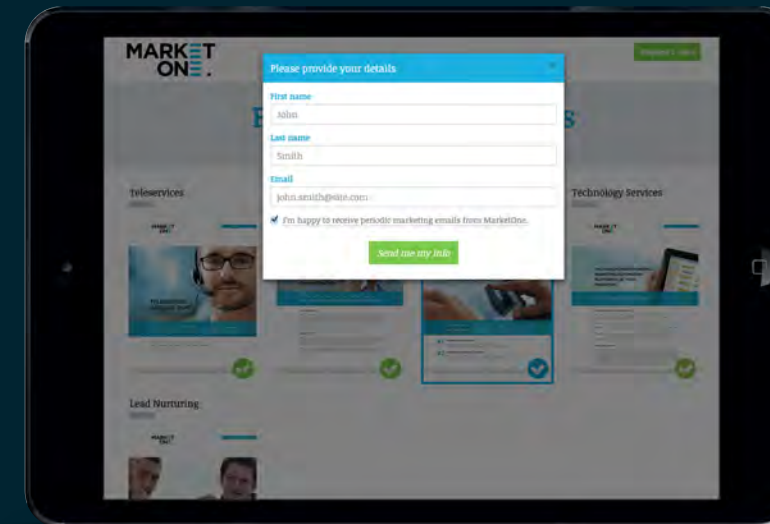
Probably the most confusing part of GDPR for marketers is what to do about events.

There are so many interactions that occur at events that would ordinarily be perceived as implicit consent, but how do we know for sure? And how do we record it?

When you can, it's a good idea to use legitimate interest as your basis for processing events data. But when this isn't an option, you'll need to use a consent regime. There are a couple of ways to tackle gathering consent at events, so let's look at it by the different interactions.

Business cards

- Send an email after the event to all those who've dropped off their business cards directing them to your preference center.
- If you ran a competition at the booth, email those who didn't win to let them know, and invite them to opt in.
- Try an event app that syncs with your CRM. Invite delegates to input their details and capture their consent right there at the booth.
- Encourage your sales team to direct delegates they meet to your preference center or ask them to bring people to the booth to opt-in.



An event app is the easiest and most GDPR-sure way to capture consent at the booth.

Delegates lists

- Delegates have the option to opt in or out of having their contact details disclosed on delegate list and shared with events sponsors.
- Double check the terms of this agreement with the event organiser to make sure delegates consented to be contacted before you blast the list.
- Make your first contact after the event a consent-gathering communication (via phone or email), just to cover your bases.

Badge scans

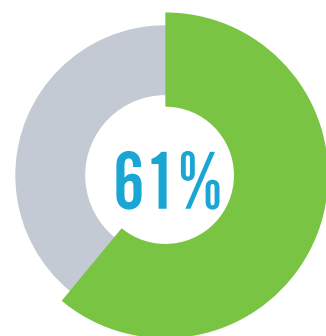
- Usually, events that have badge scanning facilities will require that delegates agree to be contacted by event sponsors, but make sure by checking the agreement before you contact them.

- Double-up with an event app or another method of consent capture at your booth, just to be sure.
- Always make your first communication after an event a consent-gathering opportunity.

Gaining consent via telephone

Under a consent regime, you're allowed to communicate with non-opted-in contacts once only. Remember, you may be able to use legitimate interest as your basis for telephone communications so check your data (and your company's privacy policy) to see if this is possible.

If telephone is your first touch, this is your chance to opt them in to receive further communications. There's a careful science to this, as you must be able to demonstrate that you are calling them for something that you believe will genuinely benefit them.



61% of UK consumers say they'll opt-out of tele marketing after GDPR.

SOURCE: EMARKETER

5 steps to gaining phone opt-ins:

1. **Have a reason to call.** A good place to start is with an enticing offer: perhaps an invitation to an event that is relevant to them, or the opportunity to receive a piece of useful content.
2. **Stick to the script.** Your calling script must include some variation of the question "do you consent for our company to contact you via phone, email, SMS, direct mail for the purposes of XYZ", clearly outlining the methods of communication, the purpose of communication, and if possible, the frequency of communication. them know, and invite them to opt in.
3. **Be clear about the options.** It has to be clear to the individual that they are under no obligation to consent (the reason you're calling must not be conditional on their opt-in) and it must be made clear that they will have the opportunity to change their preferences at any time.
4. **Direct them to policy and preferences.** This should be followed by directions to the privacy policy on your website and details of how they can change their permissions or opt-out (direct them to the preference center or give them an email address/phone number to call).
5. **Record consent in your CRM.** A note must be made in your CRM (or equivalent database) that this contact has consented or not consented, by channel, on this date.

CAPTURING CONSENT: THINGS TO START DOING RIGHT NOW

- Do an audit of your forms. Decide which fields you can justify keeping and which need to go. Plan to add your consent buttons and agree consent copy with your legal advisors.
- Start your preference center project. Update your existing one or take the opportunity to create one that follows GDPR guidelines.
- Plan your new event consent capture process, start tendering for your app if you want one, and brief your sales team on any changes that are to come.
- Prepare your calling script for capturing consent via telephone. Update your inside sales playbook to reflect the new data capture process within your CRM. Train your tele team on the new process.



3. GDPR-PROOFING YOUR OUTBOUND TACTICS

Outbound activities will have to be carefully planned to ensure compliance with GDPR rules and individual consent preferences.

This is likely where many companies will trip up, so it's crucial to take more care in planning these campaigns and paying attention to the data that you're using for them.

There are some specific changes to the rules that you'll need to be aware of with these tactics, and some things you'll need to do differently.

Marketing to bought lists

What has changed?

Third party data and purchased lists are still allowed after GDPR, but you have to be more careful about how you source and process the data.

What does this mean to marketers?

You'll need to be diligent about tracking where your data is coming from and how you're handling it. Ignorance isn't an excuse here – it's up to you to make these checks.

What should you do?

For pre-opted in lists it's important to double-check them against your own database to make sure that there aren't individuals in your bought list who have opted out or unsubscribed from your communications in the past.

You must keep the contract from the purchased list in your CRM together with the contact records of each individual on the list, along with data source and date, so that you have an audit trail of where this data came from and their consent history.

Changes to the rules of display advertising

What has changed?

If you rely heavily on programmatic and third-party advertising, either as a buyer or seller, expect big changes and you need to pay attention.

The exact law is still unclear, but the guidance so far indicates that after 25 May, you'll no longer be able to stop people from accessing your content if they don't consent to cookies.

What does this mean to marketers?

This means that if a visitor doesn't consent to cookies, it's up to you to make sure you don't show them personalised display advertising on your site.

You should be aware of what content is displayed instead of the advert for those visitors – leaving a white space may not deliver the best customer experience.

What should you do?

Options could include defaulting to preferred partner advertising, or using the space to promote your own featured offering.

You'll no longer be able to use personal identifying data to target advertising and remarketing, so you'll have to rely on broader segmentation to deliver your ads.

This is set to be an interesting development in the programmatic space, so expect to hear lots more on this subject as GDPR continues to evolve.



“ Marketing is going to change. For the better. No more cold calls. No more spam. Just meaningful interactions with people who actually welcome our marketing, rather than viewing it as an imposition. ”

STEVEN ELLIOTT VP MARKETING AND STRATEGY, MARKETONE

Social selling

What has changed?

Social selling is about to get huge. GDPR is a fantastic opportunity to maximise the use of social media to reach both cold and engaged contacts in a GDPR-safe environment.

LinkedIn in particular is the ideal platform for B2B marketing and sales because of the professional nature of the platform.

What does this mean to marketers?

The best thing about it is that the social media company or platform is considered the data controller and processor under GDPR rules, so as long as you keep all communications within that platform, you'll be covered.

What should you do?

Using tools like Sales Navigator and InMail, both marketing and sales can reach out to contacts on LinkedIn and communicate directly with them without having to gain their explicit consent.

Of course, this should be used as an opportunity to gain their consent to receive further communications (by channel, of course!).

The only caveat here is that once any data is extracted from LinkedIn and

added to your own CRM or equivalent database (e.g. exporting email addresses from connections or finding contacts within accounts and guessing their email addresses) then you become the data processor, and you are liable under GDPR.

GDPR-PROOFING YOUR OUTBOUND TACTICS: THINGS TO START DOING RIGHT NOW

- Check your contracts for any bought lists to ensure they are GDPR compliant. Make sure contracts are stored with each associated contact record in your CRM.
- Consider your plan for rethinking display ads, retargeting and remarketing without personal identifying information and cookies.
- Make sure your sales team are set up for social selling, and provide guidance on what is allowed and what's not (i.e. extracting data from LinkedIn).

And if you need a little help...

MarketOne has been running integrated, data-driven demand generation and customer engagement programs across the European Union for nearly 20 years.

With certified marketing automation consultants worldwide, we can help you navigate the complexity of GDPR and produce a practical plan to assess and then automate compliance.

We mitigate the risks and minimise disruption so that you can focus on building profitable customer relationships.

Don't delay and put your business at risk.

Get in touch and we can tell you more about the services we offer to help you comply with GDPR.

www.marketone.com/contact