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# GDPR

- GDPR – Privacy legislation from the EU
- GDPR
  - applies to companies doing business in the EU
  - Applies to companies doing business with EU citizens
- Rules around
  - Obtaining consent for data
  - Individual rights on collected personal data to
    - View
    - Manage
    - Delete



# Compliance outside of CRM

- Ensure all employees have signed NDA
- Ensure not keeping or storing data locally for non-transactional purposes
- Forward requests relating to personal data to NHO



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# Compliance in CRM - Contacts

- Must have a single source for personal data – not duplicated records
- No longer allowed duplicate contacts in CRM
- Duplicate contacts are those with the same email
- Existing identified duplicate contacts will be deactivated
- No new duplicate contacts will be allowed to be created



# Compliance in CRM - Accounts

- Each branch will have a local Account – e.g World Wide Widgets – this account will be owned and managed at the branch level
- Every account will have a parent account at the NHO level
- Will not be able to create duplicate accounts in branch
- Will only be able to assign your accounts to your orders



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# Compliance in CRM - Marketing

- Sales automation emails are covered by transactional processing
- Marketing automation emails are managed via opt-in lists and user preferences
- Duplicate emails (if any) are automatically skipped
- Further training required on Marketing Automation tools if you desire later to use them for branch specific initiatives



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