

- * **53** easy to follow steps
- * **29** useful tips
- * **12** examples to copy



**“LOVE YOUR
DATABASE”**

**“DATABASE
HEADACHE
SOLVING”**

How to get GDPR consent from your CRM database of contacts

Plus:

- 1) How to manage **unsubscribe** requests
- 2) What to do with 'Right to be forgotten' / Delete requests
- 3) Secrets to using GDPR consent to spot opportunities
- 4) Learn what to do when you **meet new contacts**
- 5) How to manage your database going forward

Copyright © 2018 Database First Aid Ltd

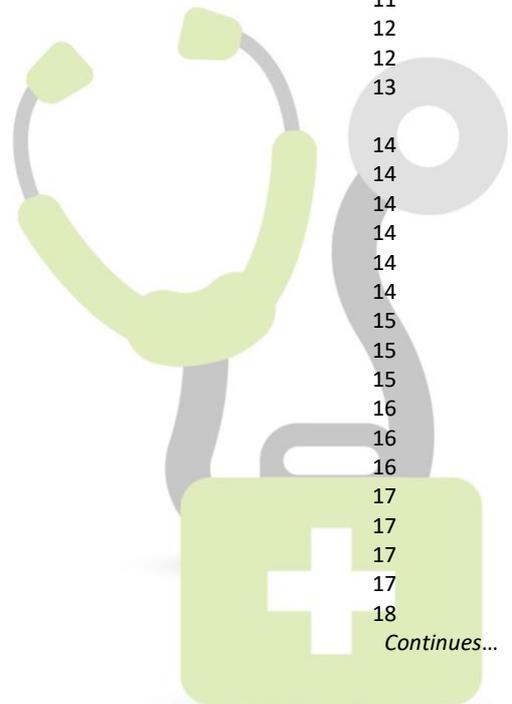
Database First Aid Limited is registered in England & Wales (Registration number: 09779518), is VAT registered (VAT No: 223750134), and registered as a Data Controller with the Information Commissioners Office (Ref: ZA156625)



Contents

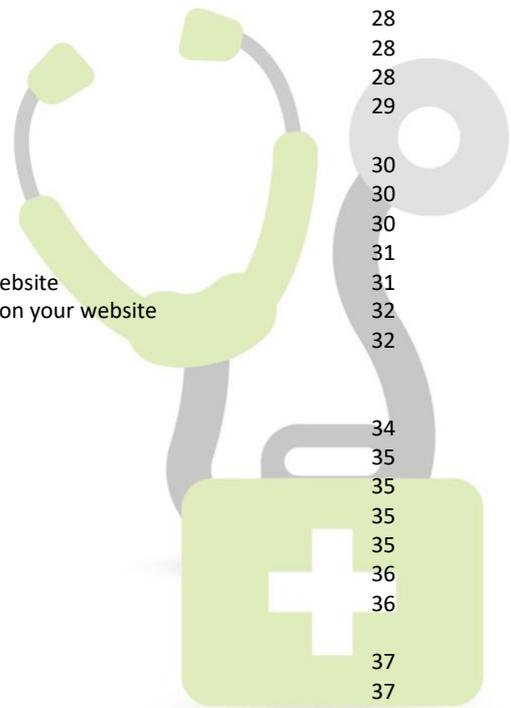
	Page
About the GDPR	4
How this guide can help you	4
How this guide works	4
Currently using multiple contact lists?	5
100% refund if you use my services	5
Free updates	5
About the Author, Simon McNidder	5
Phase A – How to get GDPR consent from your existing contacts	6
Phase A Part 1 – Get consent from contacts with email addresses	6
Summary of phase	7
Just obtain consent? Or also find out issues?	7
Which route to getting consent is best	7
Before sending consent email requests, you need to buy email marketing software and setup a preferences form for contacts to see their details	8
Create your covering email 'look and feel'	8
Create your email text to get plenty of responses	9
Create a 'Thank you for updating your details' text	9
Get your email text checked	9
Send a test email to yourself	10
Check the updated details in your software worked	10
Create segments of contacts in your database	10
Send your emails and watch the responses	10
Send 'Thank you for updating your details' emails	11
Report back initial findings	11
Using the updated details to spot contacts with issues that need resolving	11
Send a reminder to people who didn't respond	11
Send a 2nd reminder to people who didn't respond	12
Send a final reminder	12
Checklist to 'tick off' your progress	13
Phase B, Part 2 – Get consent from contacts without emails	14
Summary of phase	14
Checklist of things you may need	14
Create your letter text	14
Create thank you email text	14
Create your mailing list	14
Merge and post your letters	15
Sending your letters via 'Hybrid Mail'	15
Capturing your responses, if you only have 100's	15
Capturing responses (if you have 1,000's or more)	16
What to do with 'delete me' and 'unsubscribes'	16
What to do with 'return to sender' letters	16
Follow up your responses with a 'thank you'	17
Sending hard copy reminder letters	17
What to do with contacts without contact details	17
What to do with contacts who don't respond at all	17
Checklist to 'tick off' your progress	18

Continues...



Contents (continued)

	Page
Phase A Part 1 supporting material	19
Initial email text	19
Text for first reminder email	19
Thank you email text	19
Text for 'final reminder' email	20
Thank you email text for final reminder contacts who just clicked on the GDPR consent link	20
Preference form typical fields	21
Phase A Part 2 supporting material	22
Consent request by posted letter	22
Thank you email text to contacts returning their letters	22
Phase B – Managing unsubscribes, the right to be forgotten, or please delete me type requests, and what to do with new contacts	23
Summary of phase	24
Include an 'unsubscribe' and 'delete me' options on all marketing	24
How to manage unsubscribe requests	24
How to manage delete requests / Right to be forgotten	24
What to do when meeting a new contact	25
Getting that new contact into your database	25
Set up internal processes to capture details quickly	25
What to do with your newsletter sign-up form on your website	26
Sending a 'welcome email' to your new contacts	26
Sending a reminder email to non-responders	26
Thank the contacts for checking their details	27
Automation makes it easier for you	27
Do not add information on contacts you will not use	27
Keep your CRM database (or central list) relevant	27
Schedule 'data integrity' checks	28
When new colleagues join your firm	28
Setup data integrity processes	28
Spring Clean and enhance your CRM information	28
You are still OK to speak to clients as normal	29
Phase B supporting material	30
Welcome note to new contacts	30
Thank you email text	30
Final reminder text to new contacts	31
Typical fields you can use in your 'newsletter sign-up form' on your website	31
Typical GDPR consent wording to use in your newsletter sign up form on your website	32
Staff guideline to adding new contacts	32
Phase C – Use your new knowledge to improve your CRM	34
Doing better CRM and Marketing	35
Consent gives you better click rates and responses	35
Consent shows you who to spend effort on, or not	35
Send marketing emails that get more responses	35
Promote things more people say affect them	36
Improve your cross selling performance	36
Extra Resources	37
Legal Disclaimer	37
Contact Details	37



DATABASE

**FIRST
AID**

DATABASE HEADACHE SOLVING

About the GDPR

The General Data Protection Regulation (GDPR), is the new European wide Data Protection law that replaces the current Data Protection Act on 25th May 2018. It's unaffected by Brexit and will have a global impact. Coined as a 'game changer' by The Information Commissioner's Office (ICO), the new legislation puts more responsibility and obligations on companies and is designed to protect the rights of individuals, whether clients, staff, or prospective customers.

GDPR non-compliance is not an option, and there will be fines for non-compliance, so it's a good idea to take action now to avoid penalties later.

One area of compliance is obtaining proven affirmative consent from your contacts to receive your various different types of marketing communications. This guide can't tell you what type of contacts you should get consent from, just how to get consent. If you need GDPR legal advice, I can introduce you to GDPR lawyers.

How this guide can help you

This guide gives you the tools and knowledge you'll need to be GDPR-ready with 'provable consent by your contacts to receive your marketing communications', as well as being able to use the information you receive from your contacts to *actually improve* your marketing performance.

Step by step, and easy to follow, this guide shows you:

- ✓ how to obtain GDPR consent from contacts
- ✓ what actions you need to take when you meet new contacts
- ✓ how to "please unsubscribe or delete me" requests
- ✓ how to keep your database of contacts in good condition going forward
- ✓ learn the secrets of how to spot easy work opportunities as a result of your GDPR consent project

As well as showing you how to obtain GDPR consent, this guide then takes you a step further. For very little extra effort on your part, it shows you the secrets of how you can improve your overall marketing performance and business results at the same time.

You will learn, as well as getting opt-in, or consent, you can find out what your contacts are interested in, and what issues they are up against. You can use this knowledge to service their needs within minutes of the contact updating their details. An example from my own career as an in-house CRM database manager, we did just this exercise of finding out who wanted to receive information from us, and on what topics. When we ran a technical event on that topic, we had three times the number of delegates book on than normal. And we halved the invite list size. And cut the time it took to send the invite from days to minutes.

There is no reason why that can't be one of your success stories in a few months too!

How this guide works

This guide is split into three phases; 1) How to get GDPR consent, 2) Managing unsubscribes and what to do when new contacts are met, and 3) how to capitalise on the GDPR to get better marketing results.

Each 'Phase' is split into easy to follow steps to enable you to achieve 'mini goals' with the aim to help maintain your commitment to what, for many organisations, can be a large project. You can reach the end of a Phase and then resume your 'day job' more easily than you could from a long and complicated instruction manual.



DATABASE

**FIRST
AID**

DATABASE HEADACHE SOLVING

Each Phase contains a summary of what's covered, steps to follow and a tick-able checklist to allow you to track your progress.

Where you need to action something, such as "send an email notification to your firm", the supporting material following each section has example text you can simply copy and 'top and tail' as needed. Most software can copy the text in a PDF document. If yours can't, just get in contact with me and I'll send you the copy text.

Each step is easy to follow without much technical knowledge or specialist software. Examples to 'copy and paste' are included at the end of the guide.

Currently using multiple contact lists?

If you have multiple databases or duplicate versions of your contacts, you could find it a challenge to become fully GDPR compliant in the time required before the deadline.

If someone asks to unsubscribe or to be deleted from your system, it will inevitably be more complicated and time consuming when you have to action this on all of your multiple lists and databases and versions of contacts.

If this is an area where you need help, I'd advise you to get in touch with me, as I can help you consolidate multiple lists to ensure you're positioned to effectively and easily comply with GDPR law in this area.

100% refund if you use my services

If you buy this guide and then think "this is a bit too much work, we need help!" Don't worry – there's help available!

I've been doing this kind of thing for 20 years, and I can help you get into a better place quickly and easily. Let's have a chat about how I can help you, and should you request my services, I'll take the price of this guide off my costs.

Free updates

I hope you find this guide easy to follow. If you have comments about it and tips that will make it better for everyone, please let me know. I'll then tweak this guide and give you the updated version for free.

About the Author, Simon McNidder

I am an independent CRM Database Consultant. My company, Database First Aid, offers organisations proven advice (or assistance) on setting up or improving your CRM & marketing data, databases, and eMailshots. I've spent over 20 years using, managing and implementing CRM databases, mostly in Law and Accounting firms, including 15 years at Pinsent Masons as their CRM Database Manager (where I won not one, but two national CRM industry awards). I can help find you more clients and increase revenues simply through using your current data more effectively.

Please note that I am not a GDPR lawyer. If you need specific GDPR legal advice, I can introduce you to great experts. This guide is not giving you legal advice, it's giving you my 20 years CRM databases knowledge.

If you need help combining all your lists or duplicate contacts, finding and implementing the right CRM database for your unique situation, or ways to improve take-up of your current CRM system, please get in contact; I can solve this headache for you.



DATABASE

**FIRST
AID**

DATABASE HEADACHE SOLVING

Executive Summary

At first glance, the General Data Protection Regulations (GDPR) can look like a mountain to climb. Issues with how you secure what you keep about your clients or customers, but also your staff members.

The GDPR is a huge topic, and this practical guide isn't designed to give you a complete overview of all your requirements. There are plenty of data protection consultants doing that.

What this guide can do for you though, is show you what to do with your database of contacts. Whether that is the contacts you already have in your marketing list, new contacts you meet when networking or when you receive requests to unsubscribe from your communications or to be deleted completely, often called 'the right to be forgotten'.

This guide will take you through the steps you need to take, split into phases.

Phase A part one takes you through the steps to getting provable, recorded opt-in by your contacts. It also enables you to capture additional information on your contacts – like which of your products and services they are interested in, and you'll be able to use this to improve your marketing.

This phase only deals with your contacts where you have working email addresses. The next phase deals with the contacts where you don't have an email, or where the email bounced.

By the end of this project, you will have about 30% - 50% of your contacts opted into your future marketing activity. These are keen contacts, who are keen to hear from you. It may not be as big as your old list, but this is your best marketing list you could ever hope for. You'll know who wants to keep in contact with you – how they want to keep in contact with you, and on what topics and services you offer help with. You should thank the GDPR for making you do this – you will really appreciate knowing what your contacts want help with

Phase A part two is much like phase one, but where you don't have an email address, or it bounced, so you couldn't email the contacts. You are now going to send them a letter instead. This will get consent from them, plus their email address. So you can then soon start marketing to them like your other contacts.

This phase can feel like a huge mountain to climb. There is no reason why you would have ever done anything like this, or on this scale before. But it need not be as daunting as expected. Much like the old saying – "How do you eat an Elephant? One mouthful at a time", this phase breaks up the task into small manageable steps that you can easily do.

This guide is designed to cut your admin burden, not have you spend hours and hours updating your database manually when contacts tell you their correct details.

You may think sending your letters and logging the responses is going to take you ages. With a few clever and alternative approaches to sending letters, collecting responses and updating your database, it won't.

Phase B deals with how you can manage unsubscribe requests from your contacts (when your contacts ask you to stop emailing them), plus what to do when you receive 'the right to be forgotten' requests as the law puts it. But you'll find nobody says this unless they know the law, most will say 'please delete from your database'. And it also deals with how you can process and manage any new contacts your colleagues meet.

Phase C shows you how to utilise the extra information you captured when asking for consent to improve the experience your contacts have with you. From receiving more relevant mailings, spotting cross selling opportunities, to introducing the right people in your organisation who can help them with their business issues.

Hope you find the guide makes your GDPR consent project far less stressful than you originally thought.



DATABASE

**FIRST
AID**

DATABASE HEADACHE SOLVING