



Buyer's Guide

CONSENT & PREFERENCE MANAGEMENT SOFTWARE

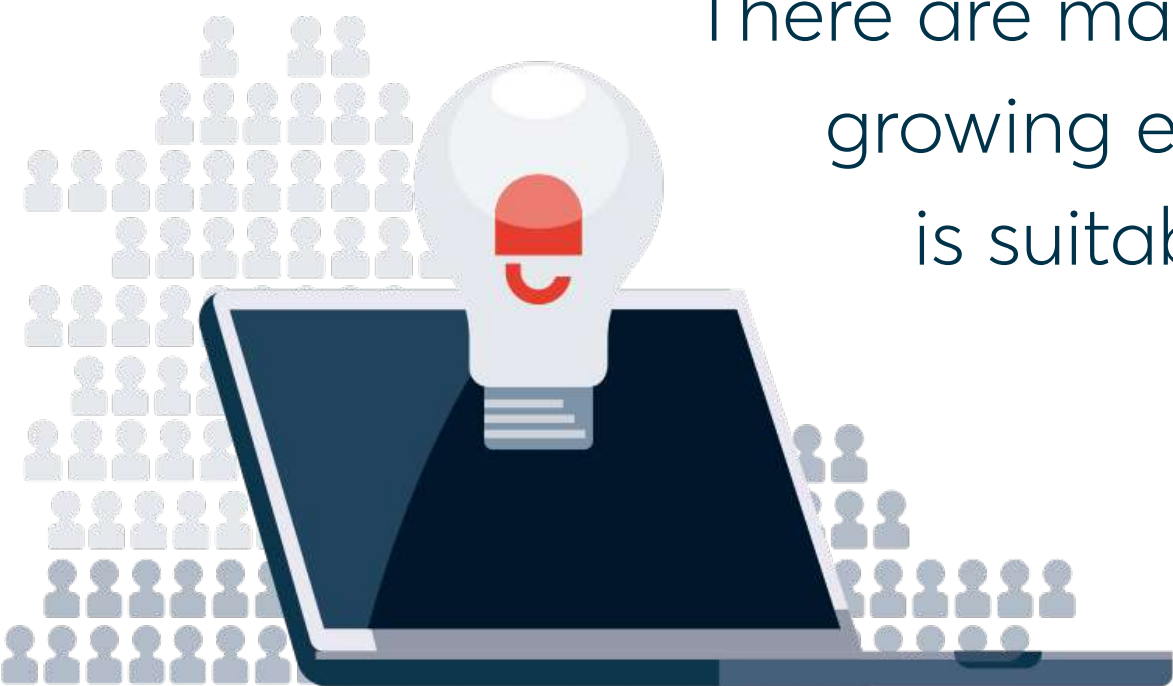
A complete guide to selecting and getting the most
from a consent management solution

Introduction

THINGS TO CONSIDER WHEN CHOOSING A SOLUTION

When considering consent and preference management, it is recognised that the responsibility for choosing the right solution doesn't sit with one person or role. Several key functions have a vested interest in selecting the most appropriate solution. Marketers, Compliance, IT and often Data teams will need to come together to make a unified decision. This requires a well thought out set of requirements that understand the relevant customer journeys and the impacts on both the customer-facing and back end systems.

There are many solutions available and the market is growing every day. So how do you select one that is suitable for your organisation?



WHAT THE RESEARCH SHOWS

A recent survey uncovered that as many as 36% of businesses are not actively collecting customer preference data. Additionally, another 31% are not sure if they are collecting this data.



Source: McKinsey & Co



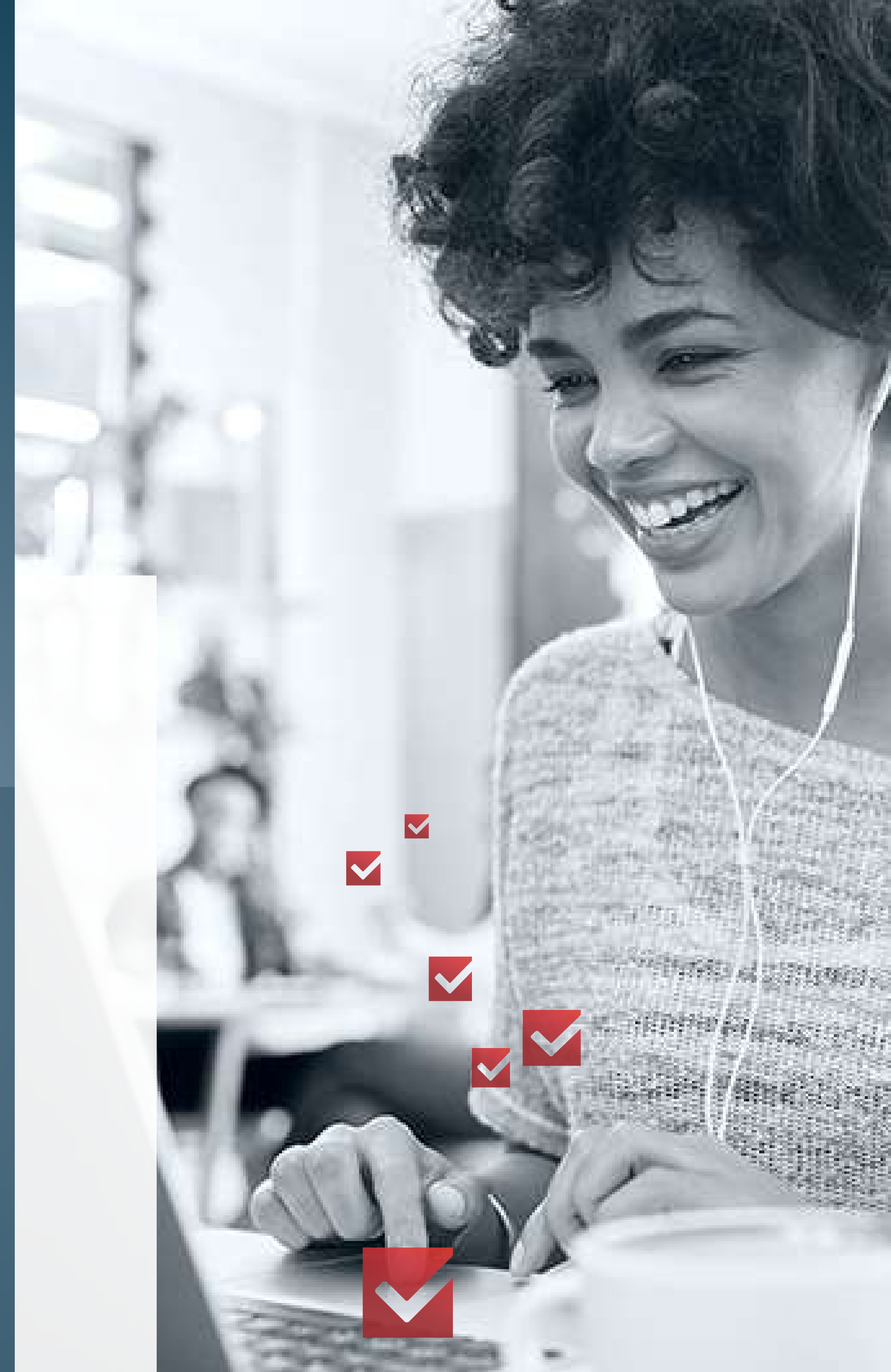
What is Consent & Preference Management

LOOKING BEYOND THE BASICS

Consent and preference management is not new. But it has evolved with the introduction of UK GDPR, CCPA, LGPD and other regulations. Stronger rules around the collection and evidencing of consent have highlighted why it is needed.

Organisations are increasingly looking for a more sophisticated consent and preference management solution, where previously a more basic capability was deemed sufficient.

In simple terms, consent and preference management tools enable your organisation to collect data and information directly from your customers compliantly. Giving more confidence over the quality of this information to enable a better data-driven marketing approach.





What is Consent & Preference Management

FINDING A COMPLIANT SOLUTION

Typically, these solutions provide:

- The ability to collect consent from customers at various touchpoints within their journey
- A consent log with associated metadata, e.g. timestamp, provenance
- The ability to collect and store preference information to better understand and engage customers
- An audit trail to demonstrate how, when and why consent was obtained.

This last point is key to demonstrate audit and accountability requirements to regulators.



Duncan Waugh, Head of Rail IT
at FirstGroup

"We implemented the platform and within 6 weeks had captured consent for over 100,000 passengers with a 68% email opt-in rate."

68%
OPT-IN

What is Consent & Preference Management

RAPID GROWTH - CAN YOU KEEP UP?

Gartner has stated in their Market Guide for Consent and Preference Management that they expect to see rapid growth in this area. They have categorised five different organisational approaches, ranging from watchers, who have typically taken a "wait and see" approach, to the risk-averse, those who have upgraded their consent and preference management options.

Organisations that have modernised their approach see great benefits when implemented well. And as the market direction is heading towards giving individuals more control over the use and sharing of their personal data, you should be considering how to upgrade your capabilities to provide your customers with the best privacy-friendly experience with your organisation.



Why Use Consent & Preference Management Software

6 BENEFITS TO YOUR BUSINESS FROM CONSENT & PREFERENCE MANAGEMENT

Your organisation needs customers. And today your customers have a lot of choices. Getting your customer engagement right can increase loyalty, strengthen your competitive position and lead to a higher return on investment. Get the implementation right and you can also streamline business activities and eliminate manual processes.

1. Improved customer information capture
2. Increased customer engagement
3. Progressive profile building
4. Reduce "blanket" unsubscribes
5. Self-serve functions
6. Connect data across systems





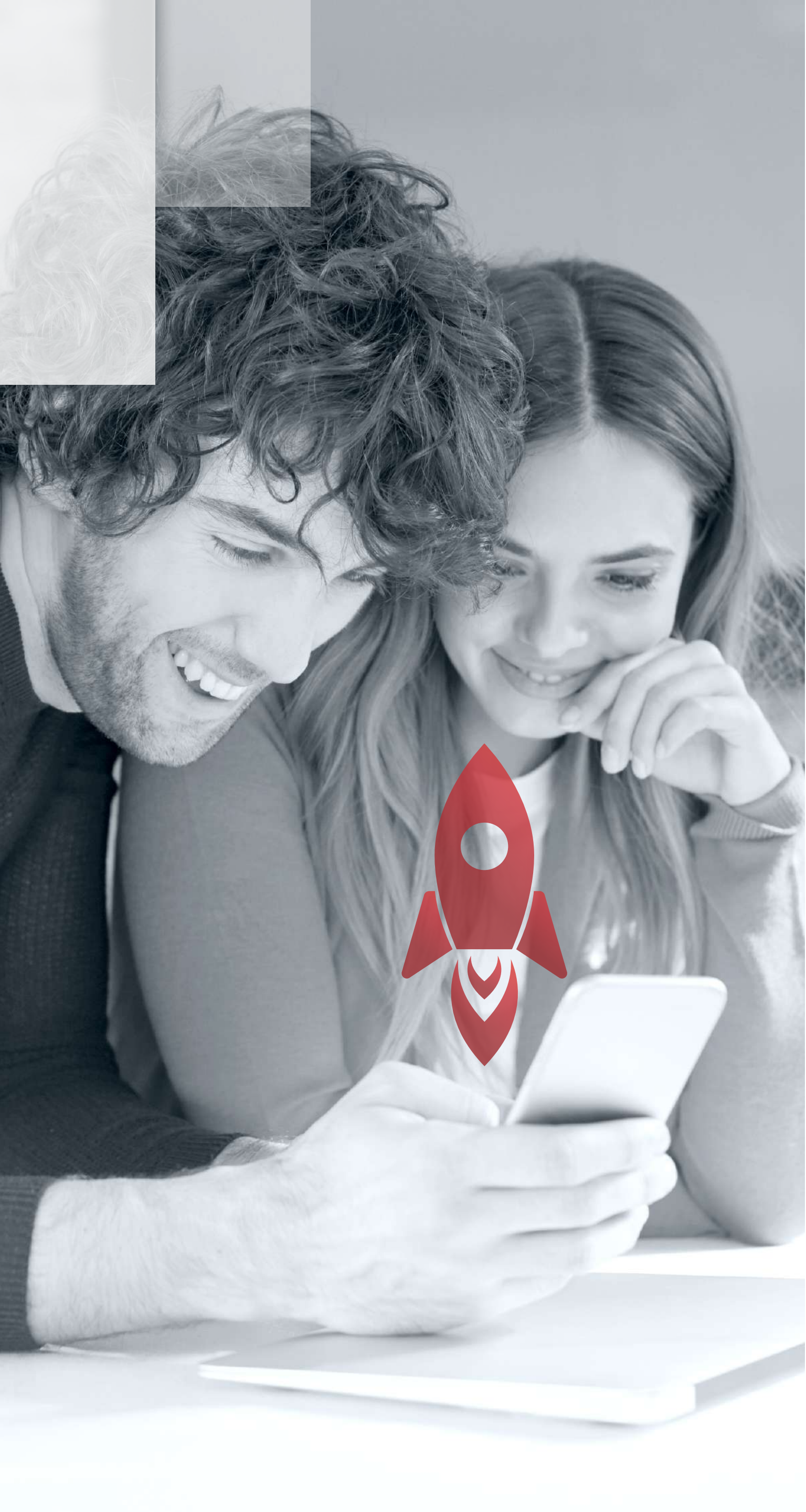
Why Use Consent & Preference Management Software

IMPROVED CUSTOMER INFORMATION CAPTURE

Implementing a consent and preference management solution will give your customers the ability to tell you directly how they want you to communicate and what content, offers, products and services they are interested in.

Collecting this in real-time from the customer ensures that you have accurate and up to date information that you can use to drive your marketing activities.





Why Use Consent & Preference Management Software

INCREASED CUSTOMER ENGAGEMENT

Customers demand more personalised experiences. Once you improve your understanding of customers, you can tailor information to their needs.

You can ensure that you promote the right message, through the right channel, at the right time.

This helps build a trusted relationship with your customers, makes them feel valued and increases their long term loyalty.



Why Use Consent & Preference Management Software

PROGRESSIVE PROFILE BUILDING

A well-implemented preference management strategy will have catered for the many touch-points where customers interact with your business.

Engaging customers with relevant options at the right point in their journey stops them from getting bombarded with bulk requests upfront.

This relieves consent fatigue and allows you to build up a profile of interests progressively.





Why Use Consent & Preference Management Software

REDUCE 'BLANKET' UNSUBSCRIBES

When customers receive an email it needs to include an unsubscribe function. All too regularly, this is a single "opt out of everything" option.

When they click unsubscribe, this is an ideal opportunity to retain customers by asking them what they want less or more of, and gain a greater understanding of their preferences.

Offering preferences to opt into, or out of, specific communications or content will retain the customer and stop them from saying no to everything.



Why Use Consent & Preference Management Software

SELF-SERVE FUNCTIONALITY

One area that is often overlooked, is to give customers a self-serve option. Customers are keen to be able to get to their information quickly and independently. Knowing they can adjust their consent and preferences at any time makes them more likely to opt-in.

If you allow them access to their consent and preferences, they can update their choices as their lifestyle changes.

This keeps your organisation's information up to date and allows customised messaging to stay relevant to the customer.





Why Use Consent & Preference Management Software

CONNECT DATA ACROSS MULTIPLE SYSTEMS

In modern organisations it is increasingly the case that data is held in multiple, often disconnected systems.

This can lead to conflicting and inaccurate consent and preference data.

Using a dedicated consent and preference management solution provides a single source of truth for this information that can be pulled from multiple systems.

3 Ways Your Current Solution Might Not be Working for You

1. CAPABILITIES ARE LIMITED

Many Martech solutions include a unit for consent and preference management. Most have some out of the box capability, but as this is not part of the core functionality, they are often too basic and do not allow for granular options. A core capability is to demonstrate transparency and give customers control over the information they want you to know about them.

Where your consent and preferences are tied to one solution, for example your email service provider, (ESP), it tends to only work in the context of that solution. In this example, if an email unsubscribes, you cannot deploy the solution at the various touchpoints within the customer journey.

This can cause customer frustration, as customers may feel that they are asked for consent, and often the same consent, each time they interact with you through a different channel. Customers demand great experiences and are very willing to seek alternative suppliers if they don't think they are getting a good experience.





3 Ways Your Current Solution Might Not be Working for You

CAPABILITIES ARE LIMITED

Where capabilities are limited, the solution is often not flexible to your changing business needs.

You may not have the control to manage the updates to your current consent and preferences without IT support, a solution upgrade or a full-on project usually involving more systems, greater cost and cross-functional projects.

Where consent and preference management are not part of the solution's core functionality, you often find that changes to meet the needs of updated regulation are implemented slowly.



3 Ways Your Current Solution Might Not be Working for You

2. INTEGRATION ACROSS ORGANISATIONAL SYSTEMS IS CHALLENGING

It is well documented that modern businesses have on average 14 separate Martech solutions.

It is likely that each of these has their own method of collecting consent and preferences.

Aside from the basics like channel, email, telephone, post, these different solutions don't look the same. Often consents and preferences cannot be matched across multiple systems and don't store the required information in a centralised database.





3 Ways Your Current Solution Might Not be Working for You

INTEGRATION ACROSS ORGANISATIONAL SYSTEMS IS CHALLENGING

There are three key risks associated with multiple systems collecting different values regarding consent and preference.

- 1.** There is no clear audit trail of what information your customers have requested or actively opted out of. Each system will contain its own audit trail, some of which are not visible to business users. Compiling evidence to support any customer data requests can be complex, inefficient and involve various business teams.





3 Ways Your Current Solution Might Not be Working for You

INTEGRATION ACROSS ORGANISATIONAL SYSTEMS IS CHALLENGING

2. You don't have a view of the latest consent and preference status for your customers. Your selections may show conflicts from different systems. This limits the confidence you have in your consent statuses and restricts the selection list for marketing activity. Sending communications to people where they have opted out could lead to complaints, customers moving to a competitor or worse, fines from the supervisory authority in your country.

3. Providing your customers with a self-serve capability becomes more complex. You need to be confident that you have the most up to date information to display and that the information can be used by each of your systems for your marketing selections.



3 Ways Your Current Solution Might Not be Working for You

3. YOUR IT TEAM CAN'T SUPPORT YOUR EVOLVING NEEDS

When you reviewed your consent and preference management requirements, it was likely an internal project team was created to build your own solution. This probably delivered the basic needs, but to ensure you maintain your high standards of customer engagement it needs to be an ongoing initiative.

Frequently cited issues with internal projects include:

- No budget or resource to add new features and requirements.
- The solution doesn't work with one or more of your other Martech solutions.
- You cannot intuitively add preference or consent requests at all touchpoints where your customer interacts with you digitally.
- You need to log a call or raise a new project to ask your IT team to make any basic changes to your preference capture and storage. These changes need to be prioritised against other projects and "phase 2" has a tendency to never happen.





3 Ways Your Current Solution Might Not be Working for You

YOUR IT TEAM CAN'T SUPPORT YOUR EVOLVING NEEDS

In addition to those issues, keeping up to date with evolving regulations across the globe requires dedicated time and subject matter expertise.

The ability to interpret and understand the nuanced requirements that are introduced can be complicated and require a dedicated resource. Then to translate that into system features to be developed, requires more developer time, which is usually at a premium.

All the time this is delayed, you are at risk of not complying with the latest legislation in one or more territories.

Purchase & Implementation Decision Making

5 CRITICAL STEPS TO BUYING A CONSENT & PREFERENCE SOLUTION

1. Understand and document your organisation's consent and preference strategy

- Understand the scope of requirements. What are the key use cases?
- Know what you need to implement NOW and in the future
- Establish implementation timescales
- Understand the cross-functional needs of the solution

2. Research and evaluate the available solutions

- Highlight where they meet your core needs
- Identify whether it can be implemented incrementally
- Ascertain how scalable the solution is



3. Implement your solution incrementally

- Implement the quick wins
- Expand and adapt to the rest of your business needs

4. Understand how you can operationalise the solution

- How much of the admin can you manage?
- Does it need IT or 3rd party support to make basic changes?
- Can it integrate with existing Martech solutions?
- Can it be implemented flexibly across various touchpoints?

5. What does the roadmap look like?

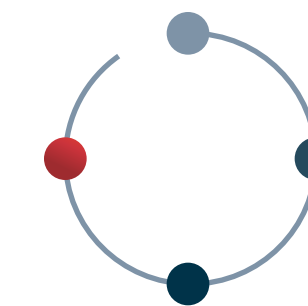
- Will it evolve in line with your business?
- How is it tracking evolving regulatory needs?
- How well is the organisation tracking market needs?



Document your consent & preference strategy



Evaluate available solutions



Implement incrementally



Operationalise your solution



Confirm roadmap is inline with your own



Adoption Challenge / Checklist

CHALLENGES FOR MODERN ORGANISATIONS

- Maturing global data protection regulations force organisations to ensure they are transparent with the use of customer data. However, these regulations vary in their rules and protections.
- Customer trust in organisations is low, so it is important to keep customers engaged.
- In-house team competing to own the project
- Many organisations are not prepared to allow customers to self-serve when it comes to managing preferences.
- Another Martech solution that can deliver some of the capabilities.

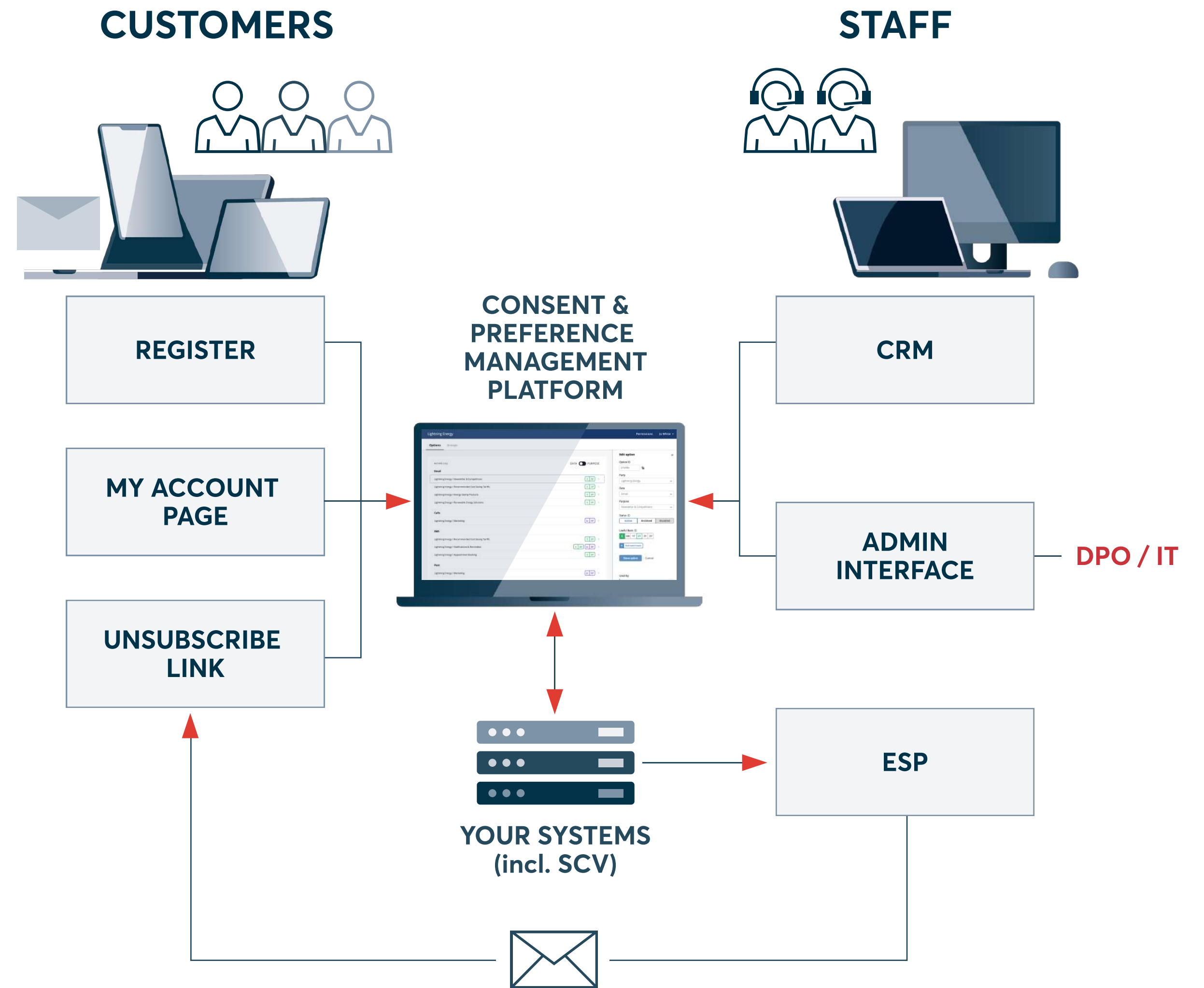


Example

TYPICAL USE CASE

Our experience of helping customers integrate their systems and business processes with DataGuard has shown that the most common elements to consider are:

1. Collecting consent and applying permissions at sign-up
2. Providing a My Account page with full permission & preference input
3. Ensuring unsubscribe from email flows correspond to granular permissions to avoid blanket opt-out
4. Embedding a seamless consent & preference view in your CRM to allow staff to manage permissions from your source system
5. Synchronising with consent & preference management platform to drive marketing activity based on accurate permission and preference state
6. Evolving to capture progressive consent to prevent consent fatigue and capture targeted permissions



MANAGE CONSENT & PREFERENCES COMPLIANTLY

1. COLLECT & SYNC

1.1 Collect consent & preferences across your entire digital estate

From internal CRMs to website registration forms, customer account pages, mobile apps and email links, are these centralised across your entire digital estate?

1.2 Connect your consent & preference world

From CRM's to email service providers, single customer views, campaign management tools and data warehouses – will you have the API and connectivity to ensure consent and preference data is not only centralised but can be distributed where you need it most?

2. ENGAGE CUSTOMERS AND INCREASE OPT-INS

2.1 Engage customers and increase opt-ins

Can you improve customer insight and targeting using granular, contextual and progressive consent tools?
How will customers self-serve?

2.2 Retain customers - why leave so soon?

Keep communication channels open and maintain customer relationships by giving choice rather than only blanket opt-outs.



3. COMPLY & GAIN INSIGHT

3.1 Comply with data protection regulations

How will you evidence consent and preference management compliance under GDPR, CCPA, LGPD & EPR?

3.2 Inform your consent strategy using KPI's

How can you gain the insights you need to track general opt-in levels? How can you see which campaigns and collection methods result in higher opt-in levels to drive your consent strategy?

4. DEPLOY & SIMPLIFY OPERATIONS

4.1 Easily deployable mechanisms

What forms and widgets are available and can they be branded to your business? Can they be deployed as needed across your digital estate to multiple touchpoints, each displaying the appropriate request?

4.2 Updates can be easily made

How will changes to consent and preference frameworks and deployments be made? What IT support will be required?



About us

WHO WE ARE

DataGuard is a privacy and information security company with offices in Munich, Berlin and London. With our combination of human expertise and a web-based platform, we help over 1,500 businesses to manage compliance with total peace of mind.

Our solution is represented in Gartner's 2020 Market Guide for Consent and Preference Management (under our former product name MyLife Digital) and has a 5* rating in the Salesforce AppExchange.

PROTECTING OVER 30 MILLION CUSTOMERS



...and many more



"As a result of flexibility for recording permissions introduced by DataGuard, UNICEF UK have seen a significant increase in the number of supporters giving consent to marketing depending on channel."

Vicky Johnson
Head of SupporterCare, UNICEF UK





It's time to be more transparent with your data.
It's good for you and your consumers.

Are you in? Let's chat!



[BOOK FREE CONSULTATION](#)

or call us now: **+44 20 35146557**