

# An Email Marketer's Checklist for **GDPR Readiness**





# Introduction

This **May 25th, 2018** is going to be crucial for your business—it's the day that revolutionizes your relationship with all your **EU users**. Let's welcome the [General Data Protection Regulation \(GDPR\)](#) that takes effect on that day, bringing changes to businesses in terms of user data collection, processing, and management.

As **personal data** takes the **primary position** now, your role as an email marketer is going to be even more crucial. It's essential to understand the impact of GDPR on your team, and plan on the things needed to stay abreast of the trends.

## How do you benefit from this checklist?

We've designed this checklist to highlight how the core duties of an email marketer will change once GDPR is ratified, and how to become compliant with the new regulation. You'll now be responsible for your subjects' i.e. subscribers' personal data in terms of:

- > Data Collection
- > Data Processing
- > Data Storage and Access
- > Data Erasure and Transfer

This 2018, get ready to achieve results by performing smart and clean email marketing. Go ahead and check your GDPR readiness!

# 01

## Data Collection

All about audit and record of user data

- Document a thorough plan before setting out to collect your users' details by understanding what kind of data your business needs.
- Perform an internal data audit to know what personal information you hold about your existing users and if they've already given a consent.
- Only collect necessary and relevant data and don't overdo with multitude of fields and boxes.
- While soliciting an explicit consent from your users, make sure to mention the purpose of your data collection—for what you'll be using their data, moving forward.
- Use double opt-in for earning consent. Obtain separate consent approvals for distinct purposes.
- Don't use pre-ticked boxes, pre-populated fields, or any form of default consent. Use only clear opt-in checkboxes and text fields where the user voluntarily affirms their consent.
- Maintain a simple and comprehensible language while seeking consent from users so they understand what they are agreeing to.
- Be watchful when you account for children or special category data (sensitive data like race, religion, genetics, etc.) and collect it only when you have a legitimate purpose and provision.

# 02

## Data Processing

### Management of curated data

- Organize the collected information and make the most use of it in your engagement efforts.
- Conduct periodic reviews to verify the veracity of the subjects' data and make sure it is maintained up-to-date.
- Upon a user's consent, use their data only for the purposes you have detailed to them and not for other unaccounted reasons.
- Whenever a change is made in the process of handling the data, include that in your privacy notice, and promptly communicate it to your users.
- Allow an individual to restrict the processing of their personal data when they aren't comfortable in certain ways you use their information.
- Handling special category data requires additional attention and users' authorization. Delete any accidentally created data when it's not been permitted by users.
- Don't hold unprocessed personal data of consented users for more than six months (*A best practice you could follow!*).

# 03

## Data Storage and Access

### Security and modification of data

- Preserve information in an encrypted format for utmost security. Data subjects rely on you and you're held culpable for any kind of data loss.
- Be transparent with your subscribers about where you store their data, and don't let any third-party services or unaccredited persons to access the stored data.
- Allow users to see their information in a readable format at every point in time.
- Permit users to opt out of your services when they are no longer interested in connecting with you.
- Allow for rectification of users' data, so that they can make changes or updates to their information whenever needed.
- Create provisions for individuals to object to the usage of their personal data in profiling, automated decision making, or any form of marketing.

# 04

## Data Erasure and Transfer

### Portability and deletion of data

- Let users conveniently export their data anytime from your systems through password-protected files.
- Use an easy method to migrate users' data across different data centers of your organization.
- Define and permit processes to securely dispose the personal data when an individual asks for an erasure.
- Never penalize individuals for their request to remove or transfer data, and do not delay in responding to either.
- Erase the personal data of consented users if you haven't used it at all for more than 6 months. (*A best practice you could follow!*).

**Disclaimer:** Compliance with the GDPR requirements is possible only with the combination of people, process, and technology. Zoho Campaigns has made the best efforts to provide solutions that you can use to comply with the law. The information presented here should not be taken as legal advice. We always recommend that you approach legal counsel to advise on the best ways to ensure GDPR compliance.

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For more information on how you can be GDPR compliant with Zoho Campaigns, [click here](#).

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