

How do I capture consent of leads before or after adding them to Mindmatrix?

Feature:

Using an email campaign and capturing consent of leads or contacts before or after adding them to Mindmatrix.

Who will be using this?

Marketing managers and Channel Managers in particular; but any users who wish to capture consent of leads or contacts may benefit.

Benefits:

- Capturing consent keeps you compliant with regulations, such as [GDPR](#).
- If contacts or leads consent to being emailed by you, they are more likely to open your email campaigns and less likely to report campaigns as spam.

Process:

1. To begin with, you should review your list(s) and identify any leads or contacts that need consent to opt into your email marketing campaigns.
2. Segment these contacts, either by saving them in a separate CSV file (recommended) or tagging them in your CRM or other contact management system.
3. Reach out to any contact(s) who have not consented to capture their consent.
4. Then, compare this list to your list in Mindmatrix and unsubscribe any contacts who have not provided consent before the GDPR deadline (May 25th, 2018).
5. Once the deadline has passed, review internally to see how you can capture consent.

Special instructions for clients preparing for GDPR (Before May 25th, 2018)

If you are preparing and may have contacts that will be affected once GDPR goes into effect on May 25th, 2018 we have prepared a list of recommendations below for capturing consent.

Please be advised that you should consult your own legal resources to see how these changes impact your business. You should also review

first-hand recommendations available on the [EU's official GDPR website](#) to make sure you are compliant before emailing any contacts/leads added to Mindmatrix.

For more details on how you can prepare, click [here](#) to download our presentation on GDPR and Mindmatrix's policies/recommendations.

STEP 1 - Reviewing and cleaning your list.

You should thoroughly review your contact list to find the origin of any contacts. You can use a Country field or a custom field you add to your CRM or contact management system to record origin of records.

This will allow you to quickly see how many of your contacts fall under GDPR regulations and may be affected. For a list of origins that fall under GDPR compliance, [visit the EU's official website on GDPR](#).

STEP 2 - After flagging any contact(s) that fall under GDPR regulations, review internally to see if you have provable, captured consent.

This can be by form or other communication where the contact or lead consented to be added to your email or marketing campaigns.

For example:

1. You previously sent an email campaign to the contact requesting if it was OK to add them to your marketing list.
2. The contact completed a form where they clearly provided consent to be emailed.

STEP 3 - After discovering what contact(s) still need to provide consent, move forward with reaching out to them ahead of the May 25th deadline.

You have a few options:

1. Send an email campaign explicitly asking if it is OK to continue emailing them. Link the email campaign to a form, where the client may complete it to provide consent. Mindmatrix has added an email and form which you can use to capture these details. Email our team at support@mindmatrix.net to find out more.

2. Reach out individually by phone and request consent. You should still email these contacts to verify consent. We recommend also using a form, so consent is properly recorded.

STEP 4 - Ensure that two optional fields are completed in the contact record in Mindmatrix.

We have added two optional fields on the contact record. You can use these fields to track whether or not an affected contact has consented.

- Requires GDPR compliance (checkbox) - can be true or false
- How did they consent? (text) - any text

Also be sure to update the following field if no consent has been provided:

- Unsubscribe (checkbox) - can be true or false

Example below:



state	zipcode	industry	Contacttype	Requires GDPR compliance	How did they consent?	Unsubscribe email
			Prospect	TRUE	Contact Form Fill	FALSE
			Prospect	TRUE	N/A	TRUE
			Prospect	FALSE		FALSE
			Prospect			
			Prospect			

Conversely, if a contact has provided consent and you have record of that consent, set the Unsubscribe email field to "FALSE".

Example below:

prospect_contact_template (1)

state	zipcode	industry	Contacttype	Requires GDPR compliance	How did they consent?	Unsubscribe email
			Prospect	TRUE	Contact Form Fill	FALSE
			Prospect	TRUE	N/A	TRUE
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Note that in the third column, this contact does not require any consent, so unsubscribe email is also set to FALSE.

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Here are the same fields in your Mindmatrix account on the contact record under "Preferences":

Requires GDPR compliance

How did they consent?

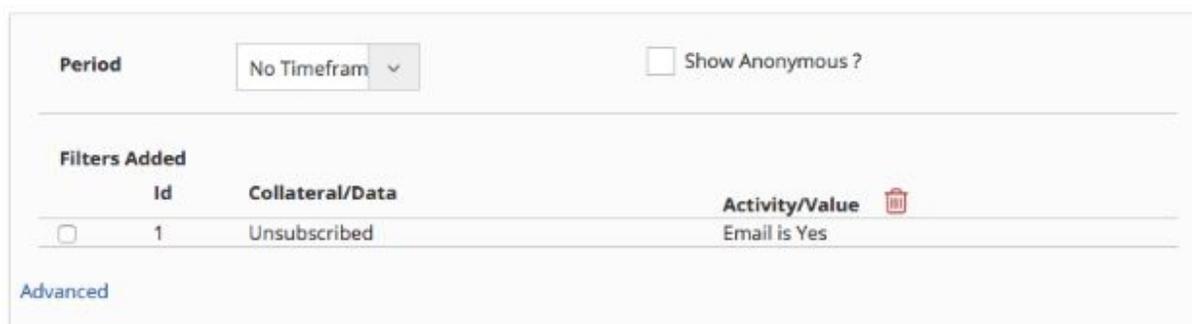
<HOW DID THEY CONSENT?>

Click [here](#) for instructions on how to import a list into Mindmatrix and update your records.

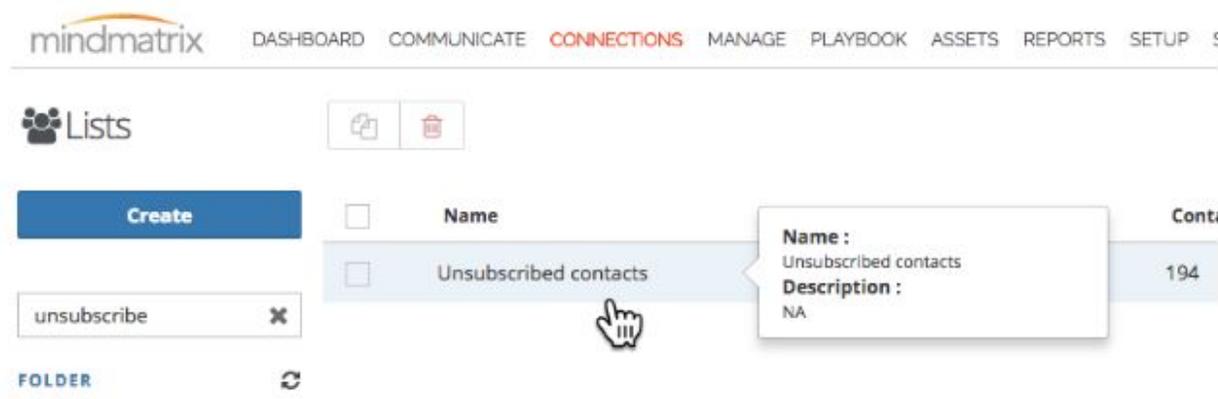
STEP 5 - Review your unsubscribe smart list in Mindmatrix.

Verify that all contacts who have not provided consent are unsubscribed from receiving marketing emails.

You can find or create this list under the Connections > Smart Lists section of your account. Create a smart list and pick "Contact Record" option. Search for "Unsubscribed" and select "Email" and "Yes".



Smart list example:



Export this list and verify that all GDPR affected contacts who have not provided consent have been unsubscribed.

STEP 6 - Take steps internally to see how you can capture consent from non-consenting contacts.

NOTE* You cannot send any contact(s) in this list unsolicited marketing emails.

Remember, it is extremely important that you consult with any legal resources or visit the [GDPR website](#) to learn more about your obligations as a Controller.

If you run into any issues with this, email our team at support@mindmatrix.net.

What if the GDPR deadline passes? What should I do?

STEP 1 - First, stop all outgoing email campaigns.

It's important that you do not accidentally email contact(s) marketing emails who have not provided you with consent.

Make sure you inform any other user in your organization who may also be sending email campaigns as well.

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How did they consent?

<HOW DID THEY CONSENT?>

Click [here](#) for instructions on how to import a list into Mindmatrix and update your records.

STEP 5 - Review your unsubscribe smart list in Mindmatrix.

Verify that all contacts who have not provided consent are unsubscribed from receiving marketing emails.

You can find or create this list under the Connections > Smart Lists section of your account. Create a smart list and pick "Contact Record" option. Search for "Unsubscribed" and select "Email" and "Yes".

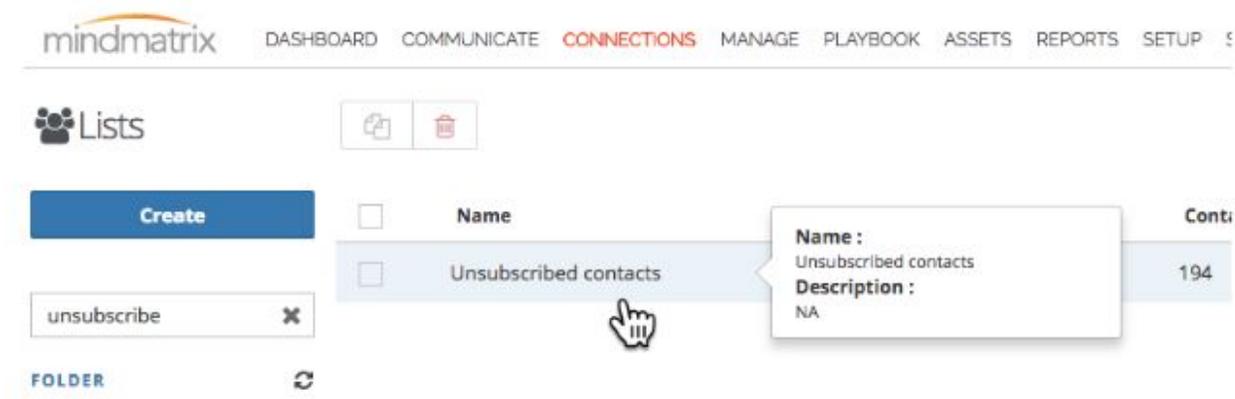
Period Show Anonymous ?

Filters Added

	Id	Collateral/Data	Activity/Value	
<input type="checkbox"/>	1	Unsubscribed	Email is Yes	

[Advanced](#)

Smart list example:



Export this list and verify that all GDPR affected contacts who have not provided consent have been unsubscribed.

STEP 6 - Review internally to see how you can capture consent post the GDPR deadline.

NOTE* You cannot send any contact(s) in this list unsolicited marketing emails.

Remember, it is extremely important that you consult with any legal resources or visit the [GDPR website](#) to learn more about your obligations as a Controller.

What if I need to capture consent at a show or other in person event?

It is advisable to explicitly request consent from any contacts, particularly if they fall under GDPR regulations.

You can setup a landing page designed to explicitly capture their consent and share this at any show or event.

For example:

Sign up to continue to receive marketing emails from

Your company name here

We want to ensure that it is OK to continue emailing you.

First Name	*
Last Name	*
Company	*
Email	*
Country	*

You can also directly ask contacts/leads and then update your records with these details.

Train your sales staff or any other staff who may be in the practice of capturing leads to also follow these best practices.