



The Uncomplicated Guide to GDPR and Event Marketing

splash

HEINZ
MARKETING

What's Inside:

Section 1: Overview	02
Introduction: what is GDPR?	04
Why GDPR matters to event marketers	05
Section 2: Minimalist's Guide	07
1. Consent	08
2. Centralized Data Management	09
3. Designated Oversight	10
Conceptual case study	11
Section 3: Resources	12
GDPR checklist	13
How to comply in Splash	14
Compliance scenario 1: Capturing consent	14
Compliance scenario 2: Allowing users to be forgotten	18
GDPR FAQs	21
Resource Library	22

LEGAL DISCLAIMER: One Clipboard, Inc. d/b/a Splash provides this guide for informational purposes only and not as legal advice. Splash cannot determine whether or not the European Union's General Data Protection Regulation ("GDPR") applies to you or your organization, and following the compliance steps contained in this guide does not guarantee compliance with the GDPR. Splash is not a law firm, and the information in this guide is not a substitute for the advice of an attorney.





SECTION 1

Overview: GDPR and Event Marketers



If you are both concerned about the pending General Data Protection Regulation (GDPR) impact on your event marketing as well as intimidated by the volume and depth of information out there, this is the guide for you.

Built specifically for event marketers (and those with short attention spans), this precise guide will tell what you need to know and what you need to put in place.

In this guide you will learn:

- What is GDPR and why you should care
- How it will affect event marketers
- Why (and how) it will improve your overall event marketing performance
- What minimum (and surprisingly simple) things you need to have in place by May 25, 2018
- How to communicate and prepare others across your organization



Introduction: What is GDPR?

In plain simple terms, it's a new regulation from the European Union (EU) that gives individuals in your marketing database more control and transparency over how their information is used and collected.

What the EU is now enforcing is what most consumers and prospects want already, and frankly what most smart companies want to provide as well. And although GDPR technically applies only to consumers in European countries, its requirements around consent and security will improve all of your event marketing efforts world-wide and domestically.

Where GDPR really matters

GDPR covers three specific areas:

- 1. Centralized Data Management:** In plain English, your event participants' information must be freely accessible to them, plus in sync and updated across every system, platform, and tool you use to email and communicate with your customers and prospects.
- 2. Consent:** You must have proactive consent from current, past, and future event registrants (not just those who show up) to store and use their data.
- 3. Designated Oversight:** Someone in your organization must be the designated "champion" of data protection for your event participants moving forward.

Why is GDPR important for event marketers?

Your entire organization should care about GDPR, but it's especially important for event marketers to champion it for several reasons:

- **Every past event impacts compliance and liability, right now:** Even if you don't have international events planned in the immediate future, any European registrant in the past, ever, is included in GDPR.
- **Future events are being impacted, right now:** Have an upcoming event that's already driving registrations? It's time to get GDPR compliant now.
- **Compliance = better engagement and conversion from your events:** This is about more than just following the law. These regulations will help improve the impact and success of your marketing.
- **Online events count too:** Really, GDPR covers anybody in your database. Which means if you're involved in online events that never actually set foot in the EU but EU members are registering, it counts.

The long game of GDPR compliance on future campaign performance

Even if GDPR wasn't looming, much of these requirements are just good business practice. Not only do they provide greater transparency and trust between your organization, your customers, and your prospects but, they will almost certainly maximize your marketing efforts. Including:

- **Higher conversion rates:** Simply put: a more accurate and opted-in database means a more engaged database that increases quality interactions and conversion opportunities.
- **More satisfied event attendees:** Attendees who trust their vendors are more likely to engage.
- **More effective post-event marketing:** With customers and prospects able to access and update their own information, the amount of personalization opportunities and ability to target nurtures increases dramatically.

“This is a huge opportunity for event marketers to step up their game -- not only by supporting their company in compliance, but also by improving engagement, participation, and trust with prospects and customers moving forward.”

—Ben Hindman, CEO of Splash





SECTION 2

The Minimalist's Guide to GDPR Compliance



As previously mentioned, a few adjustments to how you manage events (particularly invite lists, registration/attendee lists and post-event marketing) will have you on the path to GDPR compliance fairly quickly. The three core focus areas of GDPR (consent, data management, and oversight) are outlined in a bit more detail below.

1. Consent

In essence, event prospects, registrants and attendees living in the European Union need to proactively agree to ongoing communication with you (before, during, and after the event) to continue receiving communication and marketing in any format (digital or non-digital). This will apply to those who participated in events prior to May 25, 2018 if you intend to continue communication with them.

Since GDPR applies specifically to anyone who lives in the European Union, how do you know which members of your database apply? Yes, there are EU and European country-specific email addresses to find. But there may very well be email addresses from past and future events residing in the EU that use Google, Yahoo or other indistinguishable domains. Many companies are therefore applying GDPR practices to their entire database to ensure full compliance.

For past event attendees:

- **Identify a history of their past proactive consent.** If this doesn't exist, you will need to get it prior to May 25, 2018.
- **Identify a documented history of their engagement with your events organization.** This may exist already in your CRM or marketing automation platform.

For future event attendees:

- **Develop a plan for capturing consent moving forward.** This can include language in a sign-up form or additional page as part of the registration process.

Note: If you plan to share attendee lists with partners, ensure they are included in consent language from the start of your registration and attendee engagement campaigns.

2. Centralized Data Management

There are three key areas you need to consider relative to GDPR's requirements:

1. Privacy

- a. Anyone in your database from the EU can ask you to stop using or delete their data at any time. This is also known as giving users the right to be forgotten.
 - i. Legal and financial obligations are exceptions to this requirement.
- b. They may also ask you to simply stop sharing it with third parties.
- c. These requests should be documented centrally.
- d. Ask your legal team for samples of your existing privacy policies, and how they are addressing privacy language with regard to GDPR for use in your marketing fine print (link to your privacy policy from registration forms moving forward).

Example:

The image shows a screenshot of an "Event RSVP Form". It contains several input fields: "First Name *", "Last Name *", "Email *", "Job Title *", and "Company *". Below these fields is a checkbox with the text "I accept the terms of your privacy policy. * (Read It)". This checkbox is highlighted with a red rectangular border. To the right of the checkbox is a blue "Submit" button.

Want to know how to do this in Splash? Turn to page 15 for steps.

2. Security

- a. GDPR's fine print requires you to be able to demonstrate tight controls on how and where you collect EU citizen information.
- b. If audited, you may need to provide documentation of security measures
 - i. Ask your IT team what they have or have planned around this
- c. Any known security breaches must be reported and addressed within three days.

3. Access

- a. In the United States, with the CAN-SPAM law, you basically need to give users the ability to easily opt-out of future communications. With GDPR, you will need to follow three additional requirements:
 - i. Provide EU residents (past, present and future attendees) with free access to their data in a digital format (essentially letting them see what you have stored about them).
Provide a written statement for how you are using their data currently.
 - ii. Provide a written plan for how you intend to use their data in the future.
 - iii. Provide a written plan for how you intend to use their data in the future.
- b. You will want to ask your CRM and/or marketing automation managers how they intend to comply with the first requirement above in particular.

The hidden implication in this last section on access is related to sharing your attendee lists. In the past, sharing lists with sponsors and partners has been reasonably common. With GDPR, you will need to have a clear plan outlined for contact sharing up-front so that EU attendees can consent to that specifically. (See page 17 for how to do this in Splash).

3. Designated Oversight

Someone in your organization must be appointed as a Data Protection Officer. For many companies, this is likely to be someone in IT or marketing operations.

Your Data Protection Officer's primary job is to ensure a common understanding across the organization about GDPR, to ensure compliance, document policies and be a point of contact should any external parties have questions about your policies, compliance, or their data specifically.

Immediately find out if your company has appointed a Data Protection Officer and make sure your plan for event compliance is documented with them.

Are you a Splash user and want to know how to permanently delete a user from your contacts?

Turn to page 18 for the step-by-step.

List Sharing Do's & Don'ts of GDPR Compliance

Do:

- Have a list-sharing plan for future events documented as early as possible.
- Get clear, proactive consent from registrants based on that sharing plan.
- Ensure your organization is explicitly mentioned in consent copy from your partner's events (as well as those you may be sponsoring).

Don't:

- Share lists from past events outside your organization.
- Share lists with other divisions in your organization for use beyond what the attendees have already consented to.
- Share lists without noting that detail in the accessible record EU citizens have access to.

A Field Event Scenario

There's nothing we like less than guides like this that present everything in a theoretical context. So, here's a conceptual case study of how GDPR might impact how you operationalize events moving forward.

Before The Event

- Identify which members of your target list may be located in the EU and ensure their proactive consent.
- Ensure that detail is reflected across customer data platforms (CRM, marketing automation, Splash).
- Identify data integration points across other tools and partners who might be involved (such as on-site activity registrations, jointly-sponsored party registration lists, etc.).
- Develop all registration forms to comply with clear consent requirements.
- Ensure participating vendors and partners can offer similar security levels with their customer data.



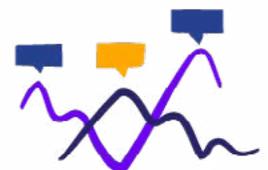
During The Event

- Ensure that any mobile apps being used comply with the same security and consent requirement.
- Ensure that any information collected offline from attendees has a path to be input into the same centrally-available database after the event.
- Think through the implications of any badge scanners or similar technologies used on-site by your organization or partners/sponsors.



After The Event

- Ensure any transfers of data (from on-site machines or to partners for example) comply with GDPR security requirements.
- Ensure any augmentations or changes in data collected comply with access and consent requirements.
- Remember that you cannot share past event data with future partners without explicit consent from past event registrants or attendees.





SECTION 3

Resources and FAQs



How To Get Started

This entire guide encapsulates your action items in the coming weeks, but here's a starting checklist to get things rolling:

Your GDPR Checklist

- ✓ Do an inventory of your EU database members – how many are there, what percentage have already given proactive consent for communication, etc.
- ✓ Make a list of external organizations that may have had access to your EU database in the past (and start talking to them about their GDPR compliance plans as well).
- ✓ Talk to your IT and/or marketing operations team to learn how customer and prospect data is shared and updated across platforms currently.
- ✓ Share this guide (or a summarized version) with your marketing team to ensure they understand the impact of GDPR beyond events.
- ✓ Update your privacy policy to reflect GDPR requirements.
- ✓ Update all event registration and engagement landing pages to collect proactive communication consent moving forward.
- ✓ Draft a process/policy with your marketing operations team for how to handle requests for correction or deletion of contact records.
- ✓ Identify and designate your Data Protection Officer.

How to Comply in Splash

Lucky enough to be a Splash customer? We make it easier for your event pages and RSVP forms to comply with GDPR. We cover the two main areas affected by GDPR on your event pages:

- Capturing consent for obtaining users' information
- Give users the right to be forgotten

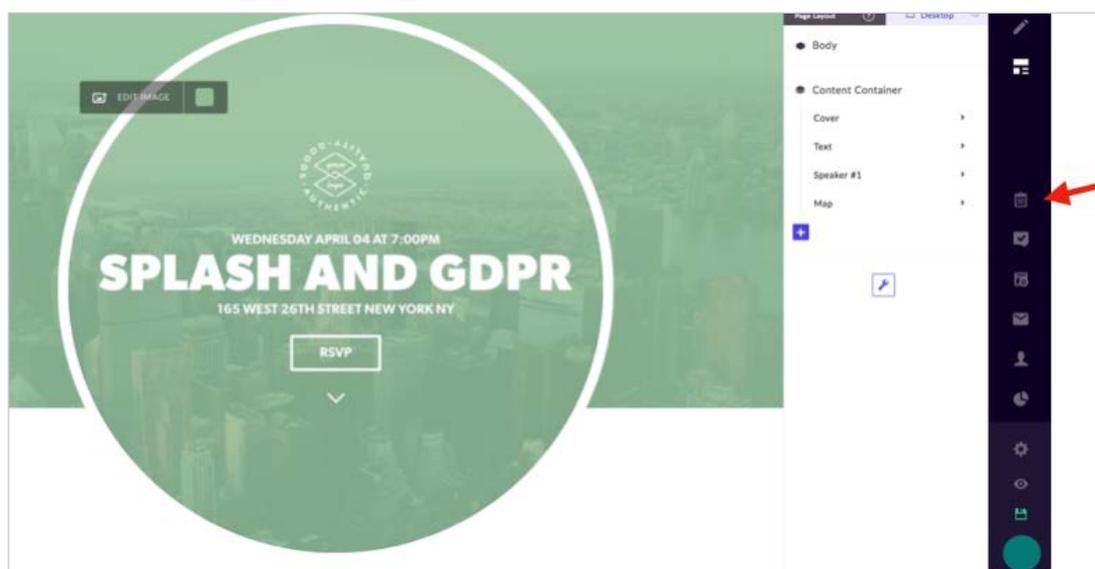
Compliance Scenario 1: Capturing consent for obtaining users' information

How to add a privacy policy to your Splash RSVP form

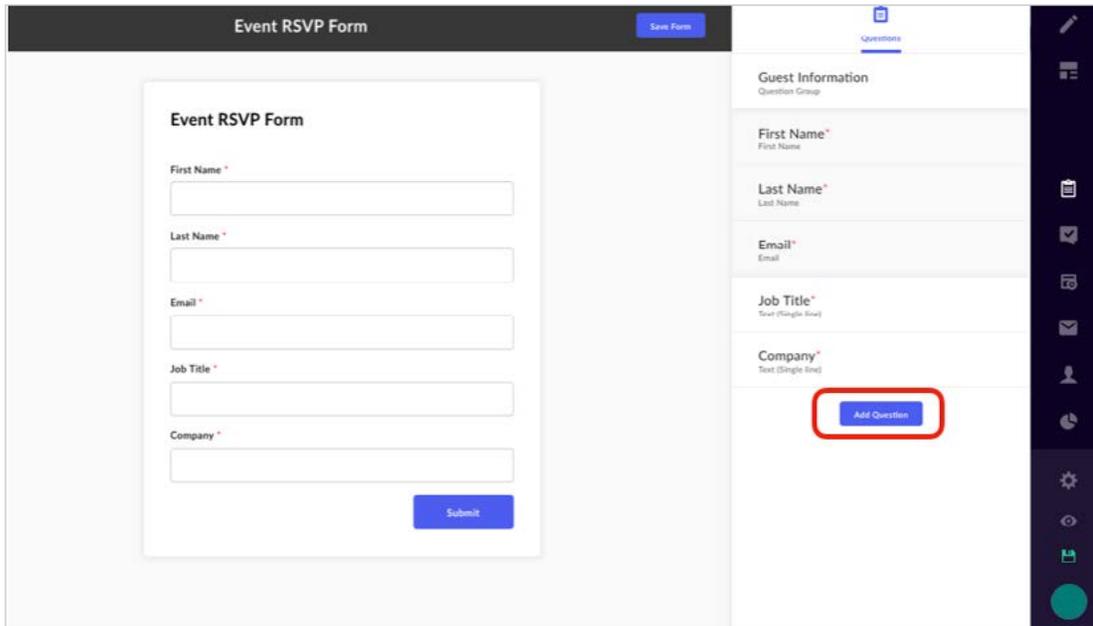
Another requirement under GDPR is to inform users that you are collecting their information, tell them how you plan to use it, and receive consent from them on these practices.

All of these details should live in the privacy policy page on your website, which is easy to link to on your Splash RSVP forms, and you can also include an opt-in field for users to agree to your policies.

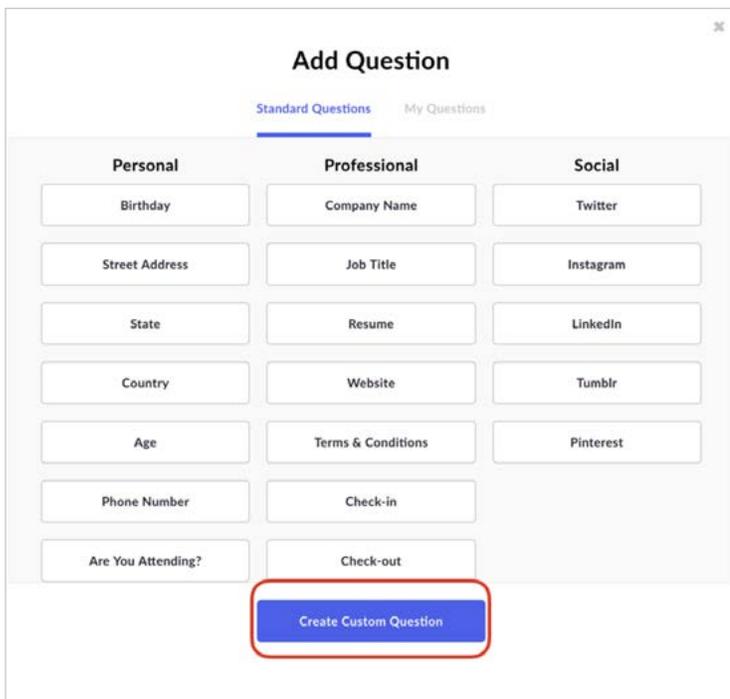
To get started, head to the Forms section, located on the right side panel of your event page.



Click Add Question, and edit the RSVP form.



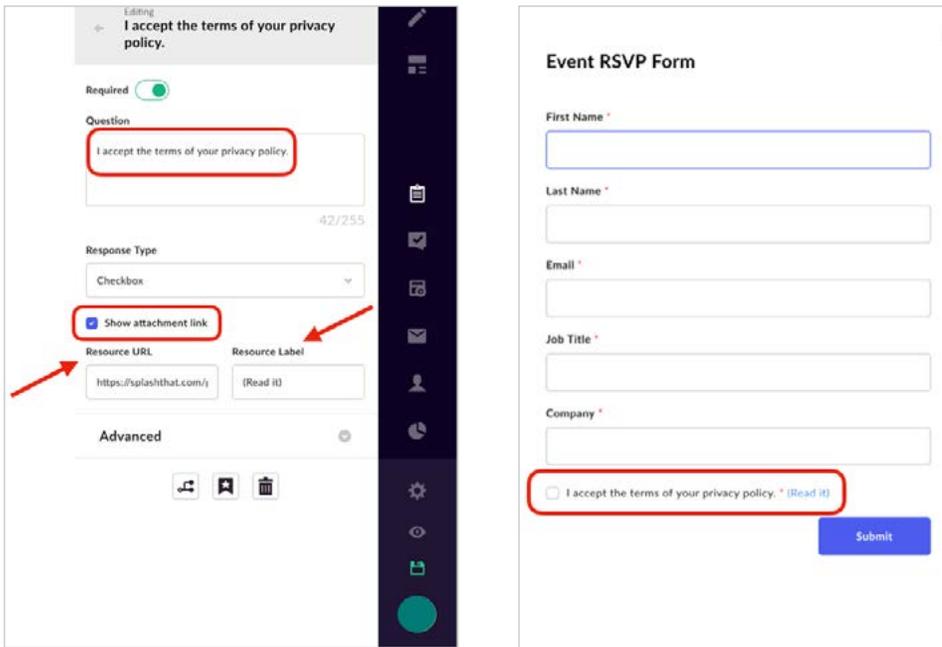
Select Create Custom Question, and then you're ready to add in language about your privacy policy.



In the Question box, add in a statement to acknowledge your privacy policy and request consent from your users -- in this example it reads, "I accept the terms of your privacy policy."

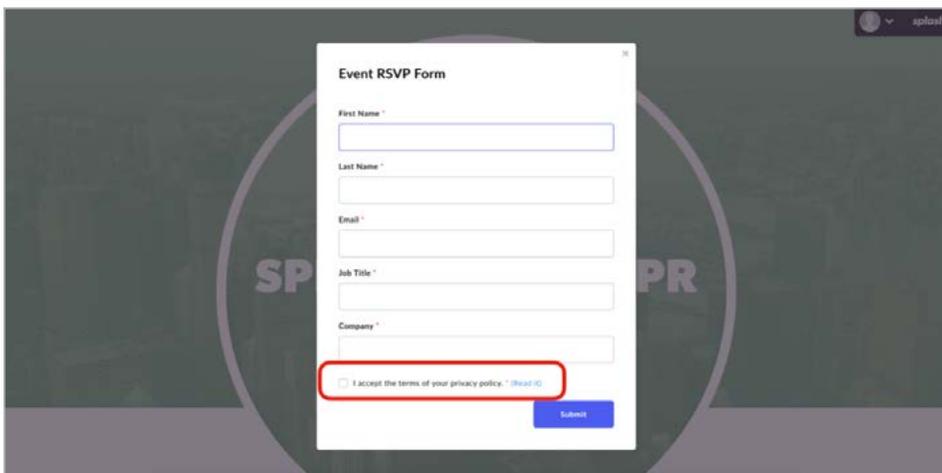
Then, click Show Attachment Link and enter the link to your privacy policy (Resource URL) as well as the text you want the hyperlink to appear as (Resource Label).

Be sure to select “Required” and choose Checkbox as the Response Type.



Note: If you have partners for your event, this is a great place to include that information for consent. These additional details in your RSVP form could look something like, “I also give consent to company X and company Y to collect my information.”

Remember to save your form, and there you have it! An RSVP form that's compliant.



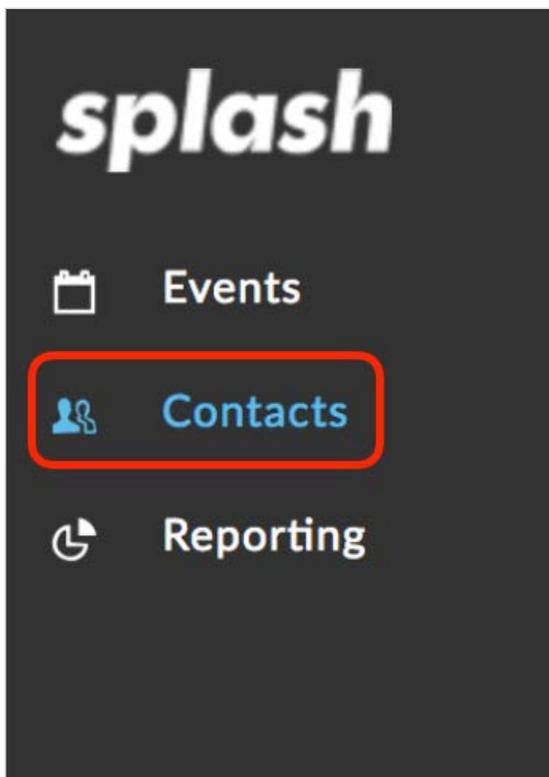
Compliance Scenario 2: Give users the right to be forgotten

How to delete a user from your contacts list in Splash

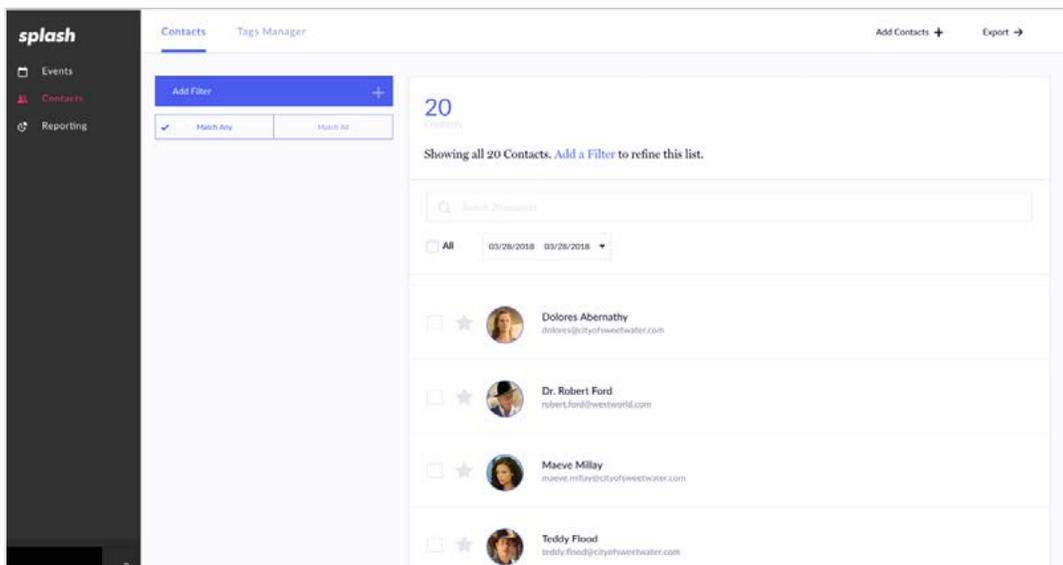
In addition to requiring consent and accountability, the GDPR gives users the right to be forgotten -- aka allowing all of their information to be erased from a company's database.

You'll want to be prepared for if someone requests to have their data erased, including the information you have stored in your Splash events.

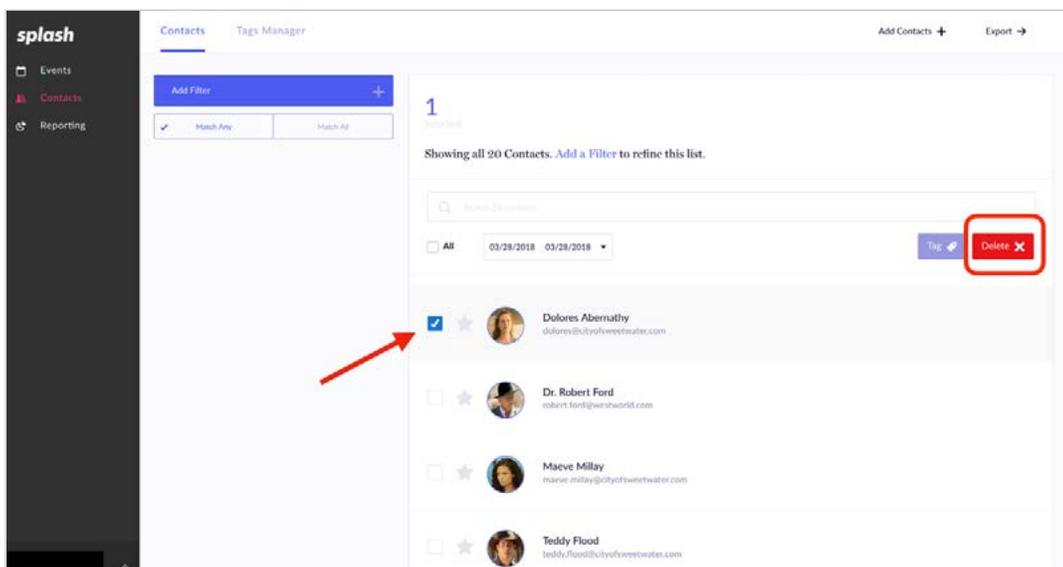
For this, you'll need to go to the Contact tab located on the left sidebar of your Events Dashboard:



Once you're in here, you'll see your list of contacts on the right side of the screen.

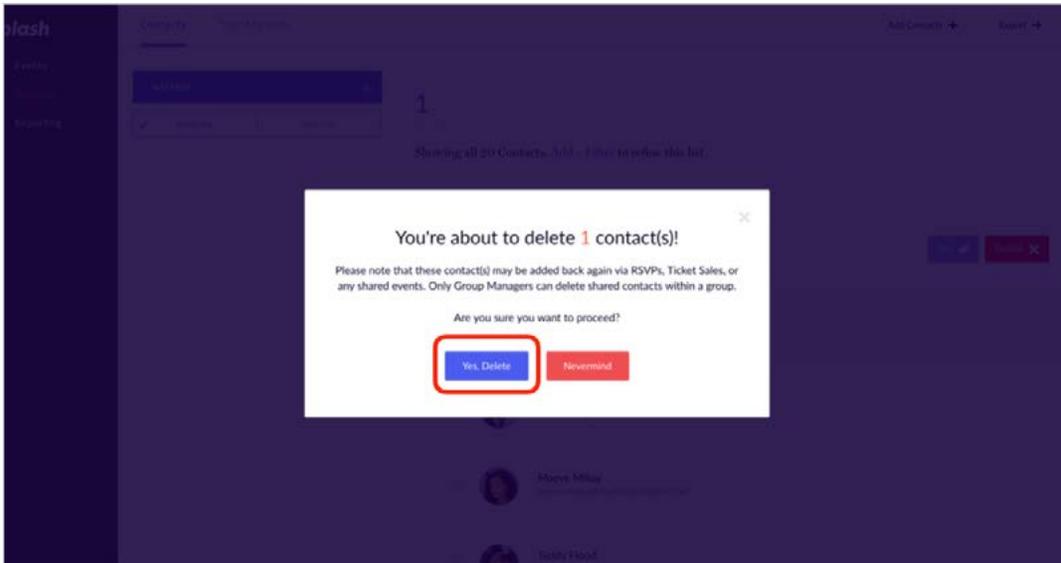


You can filter, search, or scroll to find the contact you're looking for, and then select the check box to the left of their photo. Click Delete, and then you'll be prompted with a new screen.



Bonus tip: GDPR allows for the use of pseudonyms as a workaround for this scenario. If you have information in your database that doesn't need to be associated with someone's name or personal identification, you can replace their name with a pseudonym so that their identity is still protected.

If you're sure you want to erase this person from your Splash database, click Yes, Delete to finalize the process.



GDPR FAQ

How does Brexit affect this? Do we need to worry about British event participants if they are leaving the EU?

As long as Great Britain is still officially in the EU, they're included too. The UK has its own Data Protection Bill, which includes GDPR compliance.

What happens if we aren't compliant by May 25, 2018?

Technically you'll be in violation of GDPR and fines will apply. It's not automatic (there isn't a camera behind you, we promise), but if someone reports you for violations after May 25 2018, you'll be liable.

What kind of fines are we talking about?

Actual fines are determined by a range of factors, but can be up to 2-4 percent of your global annual revenue from the previous year. So yeah, it's serious.

What if we accidentally violate GDPR guidelines in good faith?

Mistakes happen, but the law is the law. If someone notices and reports a violation, you'll still be liable.

Should someone else in my organization be running this?

Most companies treat GDPR as a group effort, with someone in marketing or the CIO's office leading the way. We recommend asking your marketing leader who else should be involved, but kudos to you for taking charge early!

What if I have more questions?

If it's related to GDPR compliance using Splash, give us a call. But you might consider asking your organization's general counsel for advice as well.



GDPR Resource Library

We worked hard to make this Event Marketer's Guide to GDPR short and easy, but there are SO MANY MORE useful resources you can dig into. The core information is the same everywhere, so here are some more "official" links to get insights straight from the governing bodies that matter.

The official GDPR regulation

https://ec.europa.eu/info/law/law-topic/data-protection_en

The GDPR portal with tons of additional links & resources

<https://www.eugdpr.org/>

A practical guide to GDPR data compliance

<https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr>

Data protection agencies by affected country

http://ec.europa.eu/justice/article-29/structure/data-protection-authorities/index_en.htm

Wired Magazine's thorough guide to GDPR with lots more links to read

<http://www.wired.co.uk/article/what-is-gdpr-uk-eu-legislation-compliance-summary-fines-2018>

The UK's Data Protection Bill (similar to GDPR but worth reading)

<https://ico.org.uk/for-organisations/data-protection-bill/>



Splash is an event marketing technology that provides customers with the tools to stay beautifully on-brand, the power to execute more effective campaigns, and the intelligence to scale event programs and maximize ROI.

SPLASHTHAT.COM



Heinz Marketing is a B2B marketing and sales acceleration firm that delivers measurable revenue results. Every strategy, tactic, and action has a specific, measured purpose. Most firms focus on the activities. We promote the outcomes.

HEINZMARKETING.COM

