



# Flushed Your CRM Contacts Down the GDPR Drain?

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How to legally recover and get more value from your CRM.



## Why Your Contacts are Gone

If you're like many organizations, when GDPR went into effect you probably deleted up to 70 percent of your Salesforce contacts because you couldn't prove the consent required by the strict privacy regulations (GDPR, Article 7). No blame here, it was the wisest move considering the potential price of non-compliance—up to 4 percent of your global annual revenue!

However, those contacts had value, such as:

- ✓ More targeted marketing campaigns
- ✓ Understanding who is engaged at prospect accounts
- ✓ More people attending field events

Losing those contacts can set your organization back to a point that's hard to recover from.

The good news? There's a way to legally recover many of those contacts.<sup>1</sup>

<sup>1</sup> People.ai does not provide legal advice. Consult your legal department to ensure all actions your organization takes fully comply with GDPR.

## You Need One of Two Reasons to Store Personal Data (PD)

First off, Articles 6 and 7 of GDPR dictate that organizations must prove one of two reasons to legally store contact data:

- 1 You have, and have documented, a legitimate interest in doing so, and that interest is not outweighed by the data subjects' rights (Article 6).
- 2 You obtain explicit consent from the data subject to store his or her information (Articles 6(1)(a), 7).

Historically, in many companies, salespeople added contacts to their CRMs from LinkedIn, trade show lists, and other places without asking the data subject for permission, much less recording consent. Under GDPR, this is no longer an acceptable practice.

However, if you don't have explicit consent, but you *can* prove legitimate interest, you're allowed to store personal data of the data subject.

### All is Not Lost

Getting explicit consent to store data requires an active opt-in from a data subject.

This is not the passive implied consent we were used to where a data subject had to opt-out or unsubscribe to be taken off the contact list.

Under GDPR, data subjects must explicitly opt-in or you cannot contact them, send them marketing or sales offers, or have any kind of electronic or print communication (except display advertising, social media and phone calls — those are still allowed with detailed reporting - go cold calling!).

So, you can't go back into your list and contact people to ask them to give consent.

However, you can go back into your sales reps' email, calendar, and phone data and try to prove legitimate interest via prior business relationship — and guess what, if your sales team had a meaningful interaction with the prospect, that's an existing business relationship, compliant with Article 6 of GDPR.

## Recover Contacts with Prior Relationship

People.ai is the first intelligent platform to link people, activity, and engagement across the buying journey. If you just got rid of a bunch of contacts because you didn't have specific consent on file, People.ai can go back through your sales reps' email, calendar, and phone systems over the last few years and help re-establish all the contacts that have interacted with your sales team and your brand.

If you're an enterprise with 1,000 sales reps who've talked with people for the last few years — we can sift through that massive amount of data and establish evidence of prior relationship where relevant. We are seeing an average sales rep engaging with 100 contacts per month. Thus for a team of 1,000 reps, you are likely to recover north of one million contacts back into Salesforce.com.

Once you have proof of prior relationship, you must complete a legitimate interest assessment to demonstrate compliance and have proof of compliance.

Keep in mind that the rights of the individual always can outrank any legitimate interest factor.

After you have established proof of legitimate interest, you can contact those people, ask them to opt-in to further contact, and continue your sales and marketing relationships.

Remember, GDPR only applies to EU residents or any data collected on persons residing in or visiting within the EU. You only need to re-establish a connection to contacts located within the European Union. However, as other entities are beginning to impose stricter privacy laws (California has a new privacy law coming into effect in 2020) it's wise to be prepared to comply with privacy laws worldwide.

## How Does it Work?

People.ai software runs in the background, constantly using AI algorithms to ensure that every email, phone call, and meeting is mapped and tracked to your CRM — giving you an accurate picture of past sales and marketing activity and creating the legal evidence you need for GDPR compliance.

It creates healthier, vetted contact lists and gives you the assurance that you're working with contact info that is relevant and GDPR compliant.

- ✓ Marketers have trusted lists and can retarget contacts with a prior relationship that were lost or blacklisted by GDPR.
- ✓ Sales can keep selling to contacts knowing they are not breaking any privacy rules.
- ✓ General counsel gains more compliance visibility (and spends less time worrying about data compliance).

GDPR is a massive regulation to stay abreast of and comply with. People.ai can help you minimize its impact and improve your CRM data with no effort from your people.

**Ask yourself these questions:**

- 1 Are you currently capable of filtering contact information to ensure you only store personal identifying data with which you had legitimate interest?
- 2 Do your sales reps track and record ALL sales activity (emails, meetings, phone calls) and map them to your CRM -- ensuring that all future data is GDPR compliant?
- 3 What value would having fully GDPR-vetted contact lists bring to your sales, marketing, customer success, and inside sales teams?
- 4 Are you and your sales team fully aware of the key principles of the GDPR and how they impact your prospecting and lead generation?
- 5 If you do not use an automated way to create and track contact and activity data, do you want your sales team to keep spending more than 20 percent of their time manually logging activity to ensure GDPR compliance? That's one full day per week. More importantly, how confident are you they are entering all the right details?

## Take the Next Step

Don't let those deleted contacts go unexamined. People.ai can help you recover lost contacts and ensure current and future contacts are handled in a GDPR-compliant manner.

We're here to help. Contact us today to learn more how we can help you re-establish the connection to contacts you've had a prior relationship with and ensure current and future contacts are GDPR compliant and 100% mapped to your CRM.

## How People.ai Meets GDPR Compliance

People.ai was created in 2016, the same year the EU adopted the GDPR—the regulations went into full effect May 25, 2018. Under GDPR, we are generally considered a data processor. We are GDPR native and fully compliant.

Compliance with GDPR is grounded in a simple idea of 'privacy by design.' Privacy by design means "data protection through technology design."<sup>2</sup> People.ai began with, and continues to, build its service using the most appropriate technologies and processes to protect all data, with a focus on the confidentiality, integrity, and availability of personal data.

How do we specifically comply with GDPR?

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<sup>2</sup> <https://gdpr-info.eu/issues/privacy-by-design/>. "The term 'Privacy by Design' means nothing more than 'data protection through technology design.' Behind this is the thought that data protection in data processing procedures is best adhered to when it is already integrated in the technology when created."

## Encryption

- ✓ Everything is encrypted during transport, and at rest.
- ✓ Encryption keys are highly protected using dual-control procedures.
- ✓ Transport layer encryption is used everywhere. This means between all endpoints, not just between untrusted and trusted endpoints.

## Pseudonymization

- ✓ Personal data is pseudonymized.
- ✓ Pseudonymization keys are stored in a separate storage location. A dual-control procedure is required to de-pseudonymise personal data manually, outside of the automated processing procedures of our service.

## Filtering

- ✓ We have a proprietary, AI-powered way of ensuring sensitive, private, and GDPR-noncompliant data doesn't end up in your CRM.

## Monitoring

- ✓ All processes—from access to key checkouts to code deployment to file and configuration changes—are logged and monitored, and tied into multiple alerting systems.

## Access

- ✓ We have a highly-controlled environment. We use Okta single sign-on that requires at least two independent factors (what you know and what you have, and often, what you are) to access any of our systems, and any of the services we use to run any aspect of our business.
- ✓ We only use a password in one location—as part of our single sign-on process. This process requires access from a managed People.ai device. It also requires a third factor if the trust level is below a certain threshold. (Currently, we use push notification to an independent, registered device.)

### **Access to any of our services can only be done via:**

- ✓ A controlled device
- ✓ Our internal network
- ✓ With multi-factor authentication

## Personnel

- ✓ We do full criminal and other background checks on all personal, not just employees.
- ✓ Everyone takes regular security and privacy awareness training that is role-based.

## Procedures

We follow controlled procedures supporting GDPR requirements around the following rights, among others:

- ✓ Access
- ✓ Erasure
- ✓ Rectification
- ✓ Restriction of processing
- ✓ Notice, including breach
- ✓ Portability

Ready to talk GDPR and how you can leverage People.ai for a better CRM?

[Request a demo today.](#)



People.ai is the first intelligent platform to link people, activity, and engagement across the buying journey. People.ai captures all sales, marketing & customer success activity to drive actionable revenue insights across the buyer journey.

Top companies from the Fortune 1000 choose People.ai to automate contact creation, identify the right buying centers and model buyer behaviour to increase forecast accuracy, improve marketing effectiveness, and close deals faster.

Founded in 2016, People.ai is based in San Francisco and is backed by Y Combinator and Silicon Valley's top investors, including Lightspeed and a16z.

Learn more at <http://People.ai> and follow us on @twitter at [https://twitter.com/ppl\\_ai](https://twitter.com/ppl_ai)

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