

# WHAT HAS LEAD LIAISON DONE FOR GDPR?

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## Existing Policies

Item	Status
<a href="#">EU-U.S. Privacy Shield Framework</a>	✓
<a href="#">Swiss-U.S. Privacy Shield Framework</a>	✓

## Security & Policy Document Updates

Item	Status
<a href="#">Data Architecture, Privacy, and Security Policy document</a>	✓
<a href="#">Infrastructure and Sub-Processors for the Lead Liaison Services document</a>	✓
<a href="#">Lead Liaison Notices and License Information</a>	✓
Incident Response Plan (Internal)	✓

## Legal Updates

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Item	Status
<a href="#">Privacy Policy</a>	✓
<a href="#">Master Subscription Agreement (MSA)</a>	✓
<a href="#">Binding Corporate Rules (BCR)</a>	✓
<a href="#">Data Processing Addendum (DPA)</a>	✓
Operational Email to Customers	✓ Sent in May 2018

## Existing Features

Item	Status
Deleting Prospects Data (Right to Erasure)	✓
Accessing/Updating Prospects Data (Right of access, Right to rectification)	✓
User/Team Roles and Permissions	✓
Audit Trail (Timeline)	✓
Data Encryption in Transit/Rest	✓
Data Management and Segmentation	✓

## Product Enhancements

Item	Status
1) Regions	<p>✓ Released:</p> <ol style="list-style-type: none"> <li>1. Add a list of predefined "Regions". Each region identified with a name and a list of countries. Customers can add more regions and add/remove</li> </ol>

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	<p>countries as needed.</p> <ol style="list-style-type: none"> <li>2. Add a new Lead Liaison Standard field "Region", automatically identified with Lead Liaison's geotracking.</li> <li>3. Default region provisioned on each account with GDPR member states. Can be customized.</li> </ol>
2) Form Active Opt-In (activated per Region)	<p>✓ Released:</p> <ol style="list-style-type: none"> <li>1. Add a new form field of Boolean data type that can be mapped to a Lead Liaison Boolean field type. Add an option to be ON or OFF (Checked/Not Checked) by default.</li> <li>2. For visibility rules add option to check/uncheck box when rules match.</li> <li>3. Useful for embedding hidden pre-ticked boxes in specific regions (non GDPR) and showing unticked boxes in regions where opt-in is required (GDPR).</li> </ol>
3) Privacy Settings	<p>✓ Released:</p> <ol style="list-style-type: none"> <li>1. Privacy section on Prospect Profiles.</li> <li>2. Additional checkboxes on Profile records to manage overall privacy, including satisfying GDPR requirements.</li> <li>3. Standard Options:             <ol style="list-style-type: none"> <li>a. Do Not Email</li> <li>b. Do Not Call</li> <li>c. Do Not Direct Mail</li> <li>d. Do Not SMS</li> <li>e. Do Not Track (controlled by "Analytics" on Consent Mgr)</li> <li>f. No Marketing (controlled by "Marketing" on Consent Mgr)</li> <li>g. Do Not Personalize (controlled by "Personalization" on Consent Mgr)</li> </ol> </li> </ol>
4) Lawful Basis	<p>✓ Released:</p> <p>New field to store justification of lawful basis. Stored in Privacy section.</p>
5) IP Anonymization	<p>✓ Released:</p> <p>Option to mask IP addresses. Replace last digits after the last decimal.</p>
6) Hiding Location	<p>✓ Released:</p> <p>Option to hide location information (city, state, zip, etc.) for anonymous visitors</p>

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7) Consent Manager	<p>✓ Released:</p> <ol style="list-style-type: none"> <li>1. Customer admin setting to turn Consent Manager on/off on your website and invoke with selected Region(s).</li> <li>2. Prompts visitors for consent using a banner or curtain options. Shown to every visitor from defined Region (see above). Helps satisfy GDPR as consent is freely given, specific, informed, and unambiguous. Shown until action taken by user accepting consent. Represented as list of checkboxes to show data processing purposes. Checkboxes control standard and/or custom boolean fields and standard privacy Settings (mentioned above).</li> <li>3. Standard Options:             <ol style="list-style-type: none"> <li>a. Analytics: We will create a browser cookie and store data about visitors and their experiences on our website. We use this data to fix bugs and improve the experience for all visitors.</li> <li>b. Personalization: We will display website content tailored to different groups of visitors. We use the data to create a better experience for you and to display personalized content tailored to your interests.</li> <li>c. Marketing: We will store information to create marketing campaigns for certain groups of visitors.</li> </ol> </li> <li>4. Standard Options can be enabled/disabled. Enabled by default. Purposes/reasons are customizable along with button color and other style characteristics.</li> <li>5. Consent updated in real-time in Lead Liaison database.</li> <li>6. Benefits: Visitors feel informed and empowered. Automates key part of GDPR compliance.</li> </ol>
8) Privacy Widget	<p>✓ Released:</p> <ol style="list-style-type: none"> <li>1. Allows Data Subjects to change their Privacy Settings.</li> <li>2. Link used with embeddable button or website hyperlink that can be added to your company's website.</li> <li>3. Prepared for returning visitors to review and/or edit existing consent.</li> </ol>
9) Data Subject Request	<p>✓ Released:</p> <p>Allows Data Subject to request rights and assists in helping Controllers satisfy Data Subject requests as outlined in GDPR (below). Requests logged into Consent Log.</p> <ul style="list-style-type: none"> <li>• Right of access (Art. 15)</li> <li>• Right to rectification (Art. 16)</li> </ul>

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	<ul style="list-style-type: none"> <li>• Right to erasure (also known as: right to be forgotten) (Art. 17)</li> <li>• Right to restrict processing (Art. 18)</li> <li>• Right to data portability (Art. 20)</li> <li>• Right to object to processing (Art. 21)</li> </ul>
10) Consent Log	<p>✓ Released:</p> <ol style="list-style-type: none"> <li>1. Logs all consent requests inside Lead Liaison.</li> <li>2. Standard requests for GDPR Data Subject rights: Erasure, Rectification, Access, Portability, Restrict Processing.</li> </ol>
11) Do Not Track Browser Coherence	<p>✓ Released:</p> <p>Do Not Track is a technology that provides users with a simple and persistent choice to opt out of being tracked by websites and platforms they visit. Lead Liaison will ensure you always respect your users' right to restrict data processing. Browser settings are mapped to the "Do Not Track" field in Lead Liaison's Privacy section. Does not cookie or track anonymous visitors.</p>
12) Enhanced Prospect Export	<p>✓ Released:</p> <p>Export full list of activities in addition to demographics and other profile data.</p>
13) Enhanced Data Retention Controls	<p>✓ Released:</p> <p>Controls to provide customers with more options to adjust retention outside of the current one (1) year retention period for anonymous Prospects.</p>