

**The Impact of GDPR within Evolution and on your Marketing**

The General Data Protection Regulation (GDPR) is an evolution of the existing data protection act (DPA) legislation. It’s aimed at ensuring businesses become more accountable for their use of Personally Identifiable Information (PII), it also enhances the existing rights of individuals. Over the last 18 months, Gemini Systems have been working with other leading industry suppliers, business leaders and our customers to develop relevant, suitable changes within Evolution and the Business Accelerators.

As a business, you should already be aware of what GDPR means for you and how it will affect your processes, practices and security. However, for more information on GDPR (and the steps you should make) The Information Commissioner’s Office (ICO) website is a good source of information and guidance.

**The GDPR update for Evolution will bring some significant operational changes to the way you can contact your customers.**

You’ll need to decide the legal grounds under which you are going to contact your customers. We expect most dealers will decide to contact their customers on one of the following grounds: Legitimate Interest, Soft Opt-In or Explicit Consent.

Whichever route you choose, Gemini Systems has developed specific functionality in Evolution to allow all bases to be covered in a single, easy-to-use format. Every customer record will have a section where users can record whether the customer has opted into communications, whether than be for Legitimate Interest, as a Soft Opt-In or via Explicit Consent.

Preferences can be recorded for 4 different Contact Types; **Reminders, Marketing, 3<sup>rd</sup> Parties & Manufacturers**. For each Type there are 4 Contact Methods; **email, SMS, Post & Telephone**.

Although there are 16 preferences only the first 8, relating to dealership communication, will impact your marketing via Campaign 365.

To be clear, your customers will only be communicated with, via Campaign 365, where they have been opted into communication. The **only** exception to this rule is where the ‘Safety Related’ option is selected during campaign creation. This option should be used for safety recalls and such items.

**Recording preferences in Evolution and the Showroom System (EvoSales)**

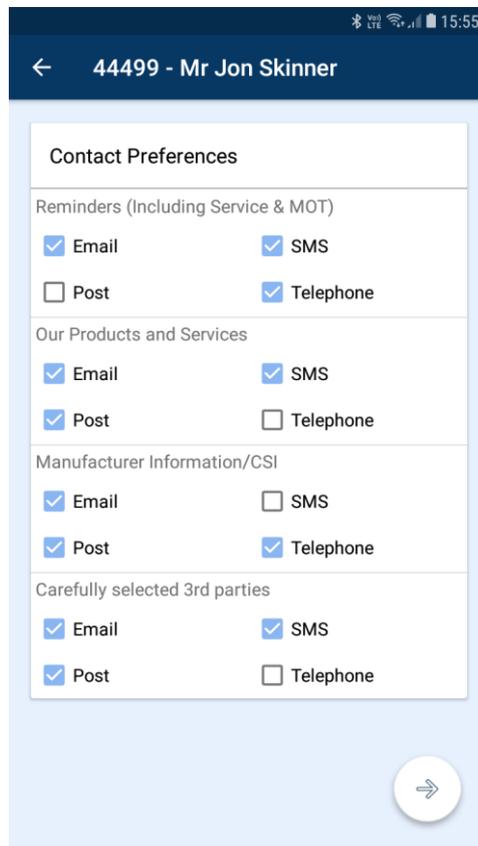
Preferences can be recorded/viewed in the customer record in a new tab called ‘**Contact Preferences**’:

The screenshot shows the Evolution CRM interface. On the left, there are 'Account Details' and 'Address Details' sections. The 'Account Details' section includes fields for A/C Reference (SK1001), Title (Mr), Surname/Company (Skinner), and Forename (Jor). There are checkboxes for 'Create Cust in Sage', 'Posted', and 'Account On Hold'. The 'Address Details' section includes fields for Street 1 (56 Main Road), Street 2 (North Hyken), Town (Lincoln), County (Lincolnshire), and Postcode (LN6 3TA). On the right, there is a 'Contact Preferences' table with columns for Contact Type, Email, SMS, Post, Telephone, Last Updated, and Updated By.

Contact Type	Email	SMS	Post	Telephone	Last Updated	Updated By
Reminders (Including Service & MOT)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09/04/2018	demo
Our Products and Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09/04/2018	demo
Manufacturer Information/CSI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09/04/2018	demo
Carefully selected 3rd parties	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09/04/2018	demo

### Recording preferences in TechMate Digital Service Advisor (DSA)

For the service department, TechMate DSA will be the simplest, most effective way of opting customers in to communication. This is displayed in the following manner as part of the **Check-In** and **Check-Out** process:



Contact Preferences	
Reminders (Including Service & MOT)	
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> SMS
<input type="checkbox"/> Post	<input checked="" type="checkbox"/> Telephone
Our Products and Services	
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> SMS
<input checked="" type="checkbox"/> Post	<input type="checkbox"/> Telephone
Manufacturer Information/CSI	
<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
<input checked="" type="checkbox"/> Post	<input checked="" type="checkbox"/> Telephone
Carefully selected 3rd parties	
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> SMS
<input checked="" type="checkbox"/> Post	<input type="checkbox"/> Telephone

#### What about my existing data?

As part of the update procedure all of your customers will automatically be opted into communication for all options mentioned above **EXCEPT** where they have specifically opted out of communication in Evolution. EG: If a customer has opted out of the 'Telephone' method only, then after the GDPR update all options will be ticked and therefore opted-in except the 4 'Telephone' options, which will remain un-ticked.

After extensive conversations with customers and other industry professionals, we feel this is the most sensible approach in updating our 500+ clients uniformly whilst having as little impact on marketing activities as possible.

#### IMPORTANT – New Business Process Required

**Following the update:** All new customer records will, by default, have none of the communication options ticked, meaning by default they will not receive any communications from you unless you Opt them in based on Legitimate Interest, Soft Opt-In or Explicit Consent.

We will continue to review the GDPR regulations and develop our solutions to help you stay compliant. If you have any questions then please feel free to contact us about GDPR, we will do our best to help where we can; contact us on 01522 698911 or [Log a ticket via Raptor](#)