

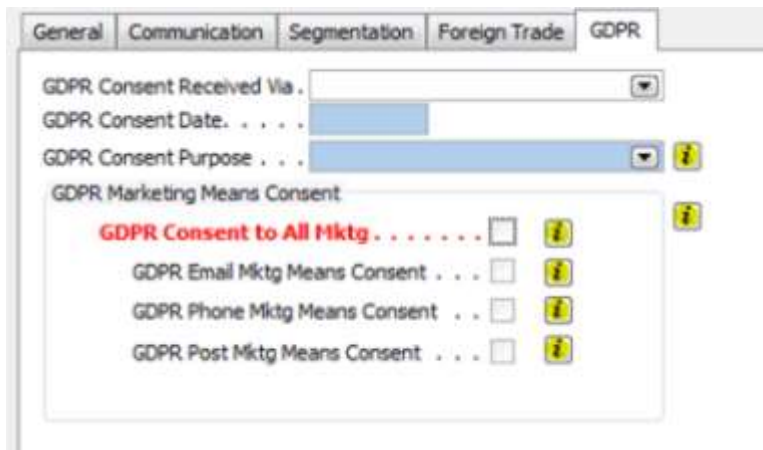
Introduction

Under the GDPR regulations, we need to obtain and maintain GDPR consent for all customers. This covers existing customers and new customers.

We will be sending an email campaign to all our customers, asking them to opt in, their options are:

- You can contact me for sales and marketing purposes
 - If so, whether by phone, email or post
- Hold my data only to deliver services – but no marketing
- Delete my data

In the meantime, whilst you are talking to customers we would ask you to run through their GDPR preferences with them and then update them in Nav in the following tab:

A screenshot of a software interface showing the 'GDPR' tab. The tab is selected among others: General, Communication, Segmentation, Foreign Trade, and GDPR. The form contains several fields: 'GDPR Consent Received Via' with a dropdown arrow, 'GDPR Consent Date' with a date picker, 'GDPR Consent Purpose' with a dropdown arrow and an information icon, and 'GDPR Marketing Means Consent' with a sub-section containing four items: 'GDPR Consent to All Mktg' (checkbox), 'GDPR Email Mktg Means Consent' (checkbox), 'GDPR Phone Mktg Means Consent' (checkbox), and 'GDPR Post Mktg Means Consent' (checkbox). Each checkbox has an associated information icon.

Below are some bullet points to help guide you through the conversations – feel free to put your own style on it! And try to encourage people to opt into the marketing information or at least to keep their data for transaction purposes.

Talking to an existing customer to update their permissions

Whilst I'm talking to you, can I double check some contact information with you?

Before you start, make sure they are the person they say they are and they are authorised to update the permissions.

- Have you heard about the new GDPR regulations which become law on 25th May?
 - If no – it stands for General Data Protection Regulations and covers the personal data we hold in our system.
 - If yes or after you've covered the point above go onto:
- Under the new regulations, you can choose what we hold your information for; the options are:
 - We can contact you for sales and marketing purposes – we won't bombard you, we'll only send you news updates and offers
 - We can hold your information only to deliver services, we won't contact you for marketing information
 - We can delete your data at the next possible opportunity once we've fulfilled your order; if the contact is a credit account customer point out to them that choosing this option will mean we will delete their account and terms and conditions they currently have at the moment including payment on account

- If they chose the marketing option, ask them if they would like to be contacted by email, phone or post
- Once you've gone through this, update it all in Nav and thank them for their help

Creating a new customer

Before you start, make sure they are the person they say they are and they are authorised to update the permissions.

Now I need to run through some GDPR questions with you - have you heard about the new GDPR regulations which become law on 25th May?

- If no – it stands for General Data Protection Regulations and covers the personal data we hold in our system.
 - If yes or after you've covered the point above go onto:
- Under the new regulations, you can choose what we hold your information for; the options are:
 - We can contact you for sales and marketing purposes – we won't bombard you, we'll only send you news updates and offers
 - We can hold your information only to deliver services, we won't contact you for marketing information
 - We can delete your data at the next possible opportunity once we've fulfilled your order
- If they chose the marketing option, ask them if they would like to be contacted by email, phone or post
- Once you've gone through this, update it all in Nav and thank them for their help

Amending permissions for existing customers who ask for them to be amended

If anybody asks you to update their contact details, before you start, make sure they are the person they say they are and they are authorised to update the permissions. If in doubt, ask them to email the request.

Please walk them through what is currently captured in the system, then ask them what they would like to update.

Update the "GDPR consent received via" and "consent date" boxes.