



Consent, Preferences, Insights, Compliance

Unlock Superior CX With Consent & Preference Data

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WHAT'S INSIDE

Page 1

Maximize Results With Our Strategic Approach

Page 2

Companies Strive to Deliver CX That Customers Expect

Page 4

Evolution of Customer Preferences

Page 6

Privacy Regulations are Complex and Fines are Large

Page 7

Delivering Superior CX Requires a Strategic Approach

Page 9

About PossibleNOW

Maximize Results With Our Strategic Approach

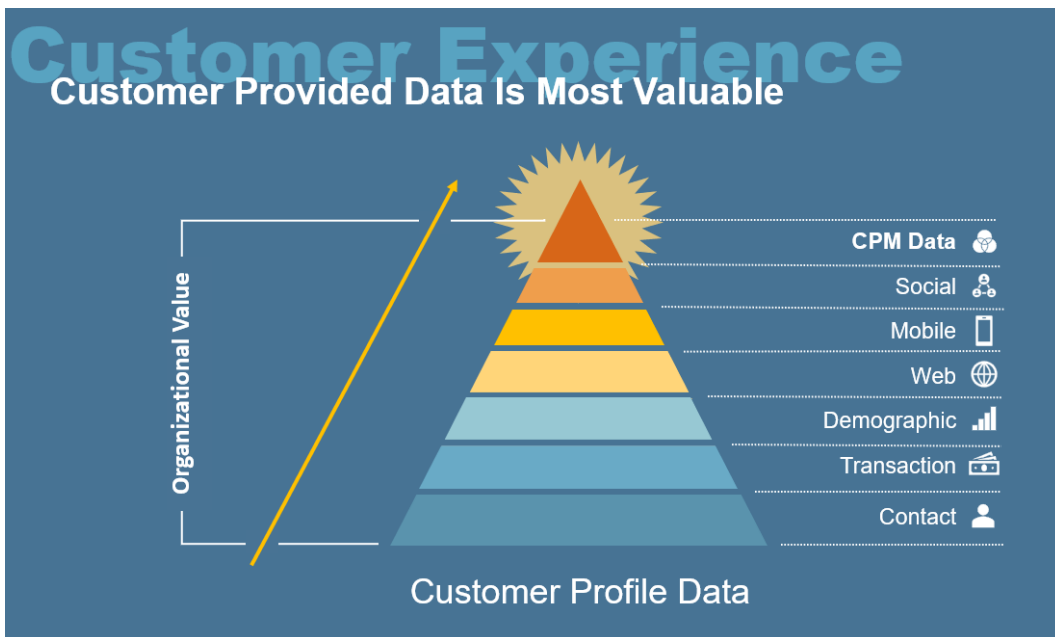
Companies use all types of data such as contact, transaction, demographic, web, mobile, social, and consent & preference data to anticipate customer's needs and provide data driven experiences.

Every type of data except for consent & preference data provides companies insights that allow them to infer what their customer's needs might be. But it's a guess.

Consent and preference data are the only insights that customers freely share what their needs are directly with the company. Consent and preference data takes the guess work out and allows companies to deliver superior customer experiences.

This paper lays out:

- Components of delivering superior customer experiences
- Regulatory drivers that make consent & preference data vitally important, and
- A methodology to get there.



Companies Strive to Deliver CX That Customers Expect

Be Trustworthy.

We live in a digital economy that is becoming increasingly complex. Customers have grown accustomed to display ads following them around the internet, stores making recommendations based on purchase history, and when you search for something with Google on one device, that topic magically shows up on another device when you are watching YouTube.

All this tracking makes consumers uneasy, so trustworthiness and privacy protection is becoming more crucial as revealed in a Salesforce study:

- 68% of customers say that advances in AI make it more important for companies to be trustworthy¹
- 79% of customers are increasingly protective of their personal data¹

Be Transparent Regarding Data Collection.

The life blood of personalized communications is having deep insights into customer needs. But as privacy regulations and data scarcity have increased, it is vital to collect data directly from your customers. When doing so, regulations require that you be transparent about why you are collecting their data, what you will do with it, and equally important, what you won't do with it. Simple, clear disclosure language identifies the following items...

- What we will send you
- Who will send the communications
- Your right to unsubscribe or update your communications
- Where to read our privacy statement

Receive Product First Looks

Be the first to hear about new features and details before they hit the market.

By submitting your information, you agree to receive product communications from PossibleNOW. You may unsubscribe at any time or opt in to specific communications by visiting our trust center.

[View our privacy statement](#)

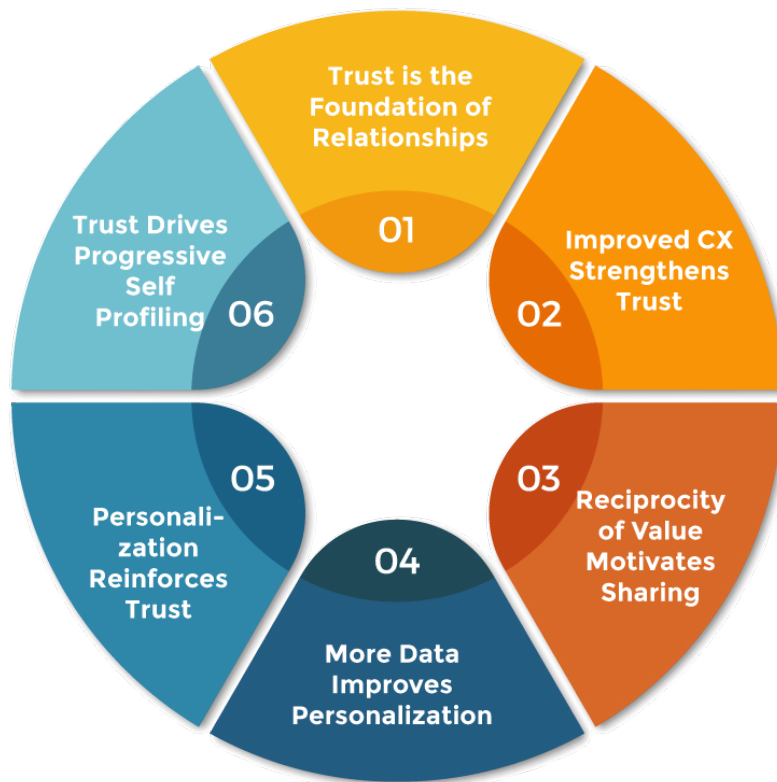
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1. Salesforce State of the Connected Customer 2023, <https://www.salesforce.com/resources/articles/customer-expectations/>

Give Customers Value for Sharing Their Data.

Customers value their privacy, so companies must motivate them to share their data by providing them with value in return. For example, in exchange for their data, they expect personalized communications, discounts, first looks at new products and more. As you deliver on your promise to provide value, they gain trust and are increasingly willing to share more insights and the cycle continues.



Evolution of Collecting Customer Preferences

- **2000 - Do Not Call Registry**
Consumers use the DNC registry if they want to stop unsolicited phone calls. For the first time, consumers have a voice and companies must comply.
- **2002 - Inferred interest**
Companies infer customer interests based on demographic data, purchase history or website activity. Database marketing provides companies ability to provide first generation personalized messages.
- **2010 - Customer preferences**
Customers opt-in to desired communications e.g. newsletters, product updates, & service alerts representing the first time customers provide brands with direct input. This data is stored in a central repository making it available across the enterprise and breaking down silos.
- **2013 - Two-way conversations**
Preference centers, email opt-down, and multi-channel access provide ability to easily update preferences and consumers expect value in return.
- **2018 - GDPR Privacy & Consent Regulations**
Introduction of GDPR privacy regulations made consent collection mandatory depending on location and device. This pushed companies to adopt privacy-by-design solutions to keep up with regional requirements.
- **2024 - Art of Consent & Preference Management**
Companies now enjoy access to detailed consent, preference, and insight data including the respective meta data to provide unprecedented customer insights and the ability to fulfill precision communications and experiences based on direct customer input.

Privacy Regulations are Complex and Fines are Large

The EU GDPR privacy regulation introduced in 2018 became a bellwether for privacy regulations and triggered a wave of new privacy laws across countries, states, and territories. The onslaught of consent and privacy regulations has forced global companies to deploy comprehensive consent, preference, and data strategies to comply with various regulations and avoid substantial fines.

These solutions include the ability to collect explicit written consent from consumers when it is required and maintain an auditable archive of those records in the event of an inquiry.

“By 2025, 74% of the world’s population will be protected by privacy regulations”*



Spying on customers is a thing of the past. Consumers have had enough. According to a Forrester report, “87% of US online adults use at least one privacy or security tool.” These tools block popups, eliminate display ads, and prevent spyware.

Additionally, all major browsers have ended or will end support for collecting third-party cookies which leads to data scarcity. Third-party cookies are small pieces of code that record which websites and product pages a person visits and places that data on that person’s browser. This data can be used to improve the user experience by remembering that person’s interests. But this data is also used by businesses to serve related advertisements to those people while they are on other sites. Most people are uncomfortable with this level of tracking which drives the need for a well thought out customer data collection strategy.

3rd Party Cookie Deprecation



Google Chrome

Market share 50%
Support ends
in Q3 2024



Apple Safari

Market share 35%
Does not
support cookies



Microsoft Edge

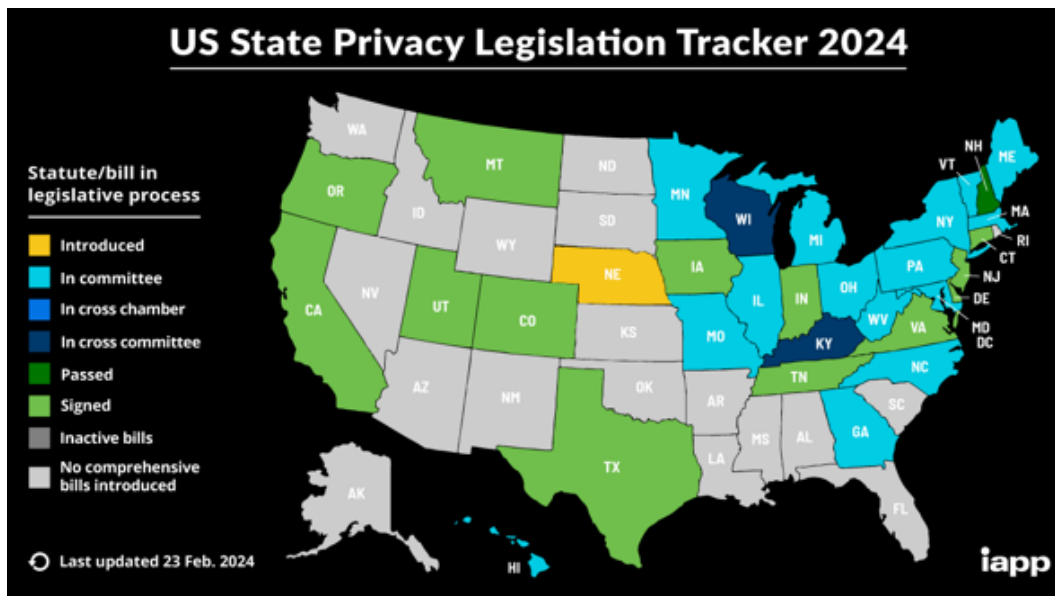
Market share 6%
Support ends
in 2024



Firefox

Market share 4%
Does not
support cookies

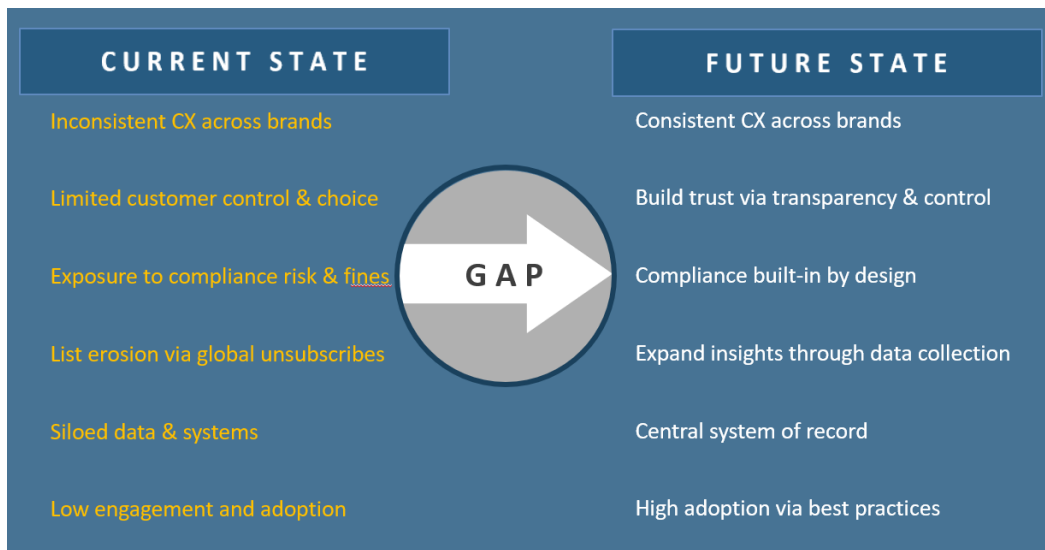
US Federal & State Privacy Laws: The TCPA, introduced in 2000, was created to protect consumers. It not only requires all companies to honor opt-out requests from anyone that puts their phone number on federal, state, or third-party Do Not Call registries, but also mandates that businesses collect express written consent prior to calling or texting anyone on a mobile device. Complicating matters, many states have crafted their own mini-TCPAs and privacy regulations that further strengthen consumer rights.



Delivering Superior CX with Consent & Preference Data Requires a Strategic Approach

Implementing an organization-wide consent & preference solution is a transformational initiative. It must include a governance team made up of people across the organization and well-thought-out systems and processes. Done right, you will not only avoid reputation and litigation risk but will also increase lifetime value of the customer. Here is our recommended framework:

- **Needs assessment.** Determine your audience segments so you know how to build a consent and preference framework for each one (e.g. demographics, purchase history, etc.). Further, consider each segment's propensity to share personal data. For example, younger audience segments are more comfortable with sharing data on social media, while older audience segments will likely require data collection through the call center or an email that links them to a data collection form.
- **Gap analysis.** Document the current state of the organization's communications, compliance, systems, and processes. Then envision the desired future state, including data you require to meet customer needs.



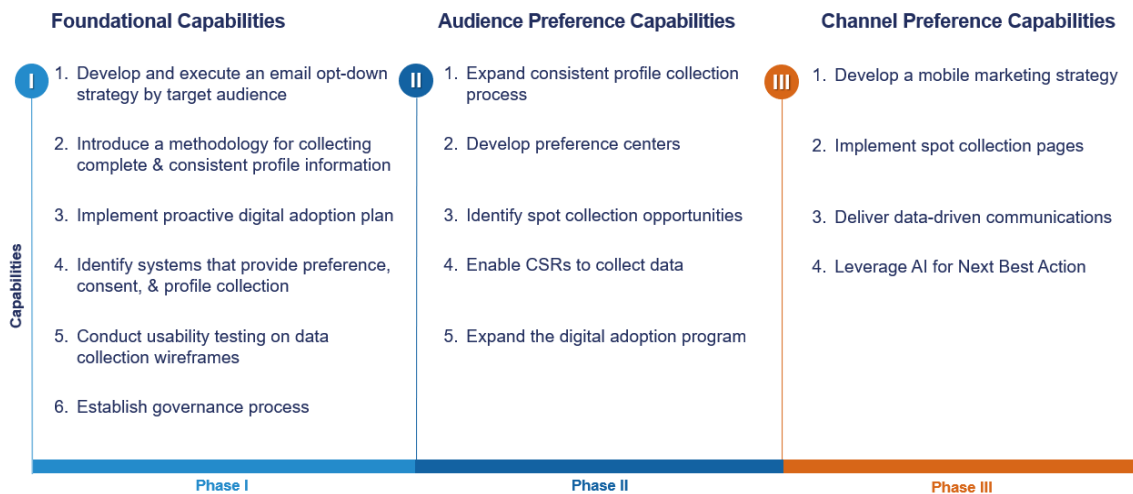
- **Data collection strategy.** Identify at what point along the customer journey is most appropriate to collect specific data. Then establish the channels best used to collect the data and through what method - such as surveys, gamification, emails, or trust centers.

- **Consent and Preference Data Mapping:** The next foundational step is the strategic mapping and framework development of consent and preference data to ensure that engagement strategies are perfectly aligned with customer consents and preferences.

Often referred to as a "taxonomy" approach, proper data mapping categorizes various consents and preferences related to customer communications into well-defined categories. Within these categories, audiences can be further segmented to identify more granular preferences, ensuring personalized and compliant communication strategies.

- **Roadmap / Recommendations.** Create a project plan that outlines what tasks need to be completed by phase. The milestones and tasks in each phase should be laid out strategically to gain early success and to build a foundation for future phases. For example, in Phase I, foundational capabilities such as implementing the infrastructure to collect and manage consent & preference data and providing customers the ability to opt-down provides the building blocks to introduce preferences centers and collect profile data in Phase II. In Phase III, you can add channels such as mobile and add spot collection at strategic places along the customer journey.

Roadmap: Capabilities Summary by Phase



- **Measure Success.** As with any initiative, reporting on key metrics enables you to celebrate success and adjust when needed. Measuring success should be done across the customer journey (e.g. onboarding, customer service, loyalty). You can use AI to analyze and interpret preference data, understand where on the customer engagement index your customers are and what the next best action should be.

We now live in a digital world which has created very high expectations for personalized customer experiences. Additionally, government privacy regulations across the globe exposes companies to significant legal and financial exposure. As a result, it is vital to collect consent and preference data (the highest value data available) directly from your customers to meet customer expectations and comply with privacy regulations. But doing so, requires a well thought out and phased approach, as described in this paper. This will help you avoid missteps, improve your chances of success, and increase the lifetime value of your customers.

About PossibleNOW

PossibleNOW is the pioneer and leader in customer consent, preference, and regulatory compliance solutions. We leverage our MyPreferences technology, processes, and services to enable relevant, trusted, and compliant customer interactions. Our platform empowers the collection, centralization, and distribution of customer communication consent and preferences across the enterprise.

DNCSolution addresses Do Not Contact regulations such as TCPA, CAN-SPAM and CASL, allowing companies to adhere to DNC requirements, backed by our 100% compliance guarantee.

PossibleNOW's strategic consultants take a holistic approach, leveraging years of experience when creating strategic roadmaps, planning technology deployments, and designing customer interfaces.

PossibleNOW is purpose-built to help large, complex organizations improve customer experiences and loyalty while mitigating compliance risk.

A smiling woman with curly hair, wearing a black top and a light-colored vest, is holding a tablet and looking towards the camera. She is in a meeting room with other people in the background, some of whom are pointing at a whiteboard. The image has a blue overlay.

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