

# Staying Compliant in the Post-GDPR Era

A Quick Guide to  
Information Regulation and Call Intelligence



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# Introduction

**Compliance is an issue that many companies would prefer to sideline as peripheral to their “real” business, but they do so at their own peril.**

Today, privacy and security concerns define how businesses communicate internally and externally, how they store and transmit data, and how they do commerce globally. Regulations around information safety impact a surprisingly big piece of the U.S. economy, with industries that interact with sensitive personal information (healthcare and financial services providers, for example) bearing an even heavier regulatory burden.

On May 25, 2018, the global piece of the compliance puzzle became a bit more complicated. That’s when the General Data Protection Regulation (GDPR) became enforceable in the EU, meaning that anyone doing business with EU countries must handle a new—and potentially hefty—compliance lift.

Follow along as we explain the background of this regulation, how it might affect you, and the ways that CallTrackingMetrics’ call intelligence platform can help you manage your global reach compliance.



## **PART ONE**

# Introducing the GDPR

In a nutshell, the GDPR wants to protect personal data—not just financial or medical, as are often the main concerns stateside, but all personal data.

To do so, it demands stricter consent for use of personal data, requires quick reporting of privacy breaches, and imposes fines on companies that do not comply.

# Origin of the GDPR

## Where—and why—did the GDPR originate?

Officially described as Regulation (EU) 2016/679 of the European Parliament and of the Council, the GDPR has been more than twenty years in the making. Well before the rise of data giants like Google and Amazon, European lawmakers saw the writing on the wall and worked to put standards into place that would safeguard consumer data and privacy.

As the regulation states in Recitals 6 and 7:

“Rapid technological developments and globalisation have brought new challenges for the protection of personal data. The scale of the collection and sharing of personal data has increased significantly. Technology allows both private companies and public authorities to make use of personal data on an unprecedented scale in order to pursue their activities... Those developments require a strong and more coherent data protection framework in the Union, backed by strong enforcement...”

**The GDPR is a step change for data protection.  
It's still an evolution, not a revolution.**

**ELIZABETH DENHAM VIA WIRED MAGAZINE**  
UK Information Commissioner

# Effects of the GDPR

## How does GDPR affect companies in the U.S.?

While questions remain about just exactly how and to what extent the EU will enforce the GDPR when dealing with multinationals, there are plenty of companies with global reach who will need to stay on the Union's good side from the beginning. Facebook is an obvious example: it's a gateway to massive amounts of personal information from European consumers, some volunteered by users, some click-generated. But it's not just global powerhouses that need to be careful not to run afoul of the GDPR.

For example, any business with marketing that directly addresses EU audiences—say, by using an EU-native language or making reference to EU users or customers—is considered to target an EU audience, thereby invoking GDPR standards. While non-EU-targeted marketing shouldn't raise any eyebrows or warrant any fines, the minute your business accepts a Euro in payment via the Web, or deploys a site with a .uk, .nl, or any other EU-directed domain suffix, the GDPR applies.



In today's data-centric world, anyone running a business—EU or not—should consider proper data privacy practices and what the GDPR means for them.

## PART TWO

# CallTrackingMetrics and Data Security

Before we jump into how CallTrackingMetrics (CTM) can help secure data both at home and abroad, it's helpful to understand what the CTM platform is, and what it can do.



# CallTrackingMetrics Features

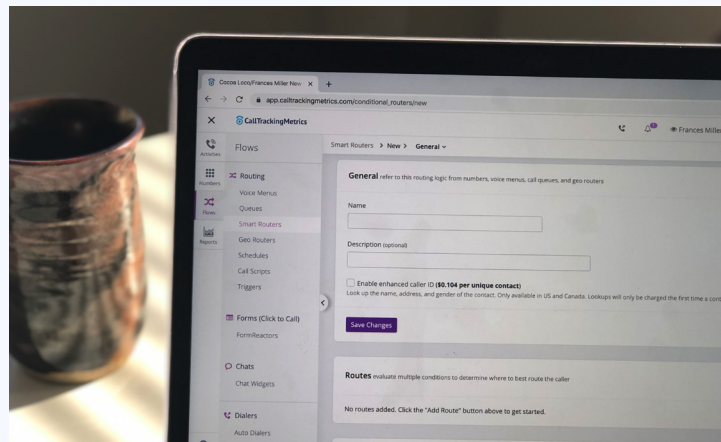
## Call Tracking

A browser-based softphone that works on any device, CTM gives you the ability to track your customers' journeys online and offline by applying custom, localized phone numbers to ads, campaigns, products, and channels, then tracking calls back to those sources. Even better, it integrates this data with your other metrics; for example, those within Google Ads or Salesforce.



## Call Routing

In the global economy, you can have sales and service agents anywhere. It's critical that your callers are connected to the most appropriate agent, spending as little time as possible on hold, and are not being transferred between specialists. To ensure the best consumer experience possible, CTM lets you route calls based on geography, product, agent availability, customizable queues, and more.



## Analytics and Reporting

Inside of CTM, you can generate customizable reports that connect the dots between ad spend, call length, revenue generated, and other factors to help you determine the return on investment of a campaign, channel, call center, or ad.



## Monitoring, Recording, Transcribing, and Notifying

CTM lets you listen to your agents to assess call quality, transcribe calls in order to hone scripts, and even trigger notifications based on keywords recorded or transcribed during calls. These features can help you train your staff, fine-tune your efforts, and respond quickly to negative keywords from unsatisfied customers.



## Engaging Your Audience

CTM helps you paint a complete picture of your audience by tracking call sources and keywords, tagging and scoring calls based on quality and conversions, and marrying that data to other metrics. Even better, it presents all of this information in real-time to agents as they take calls, so that they understand each caller's journey and needs. This helps you engage more deeply, serve better, and generate more revenue.





# How does CTM secure data?



CallTrackingMetrics provides a powerful way to improve your marketing ROI, drive conversions, train service and sales agents, and more. But the platform takes all of this functionality a step further by addressing the privacy, security, and compliance issues that many industries face (especially since the introduction of the GDPR).

## Disabled Recordings and Transcriptions

While CTM's ability to record and transcribe calls can be a powerful quality assurance measure, it might not be appropriate to the content of the call.

A simple toggle gives you the ability to quickly and easily turn off these functions at the account level, so that customers in heavily regulated industries or GDPR-impacted nations can be protected. CTM also lets you disable fields that might contain private information, including contact information.

## Two-Factor Authentication

**One secure login is good, but two is better.** CTM's two-factor authentication, when enabled, sends users a code via SMS that's required to gain access to the CTM platform. Administrators can customize the frequency of the second layer of security, requiring it anywhere between every new login or every 30 days.

## Data Management

GDPR gives data subjects rights over their data. It's important that controllers have the tools they need to edit, update, delete, and transport data. **CallTrackingMetrics makes it very easy to update contact records right in the call log.** The export function provides lots of customization so you can easily provide customers the information they are requesting.

## Redaction

A great way to manage the data in your account is to enable automatic redaction, which removes personal information from records of calls, texts, and forms after a certain amount of time. If you don't want to use automatic redaction, you can manually redact information from any of your interactions, such as when a data subject has requested that you remove their data.

## Detailed Logging

CTM lets you create logs of the activity around sensitive data. Access is logged by time, user, and IP address—so if data is accessed in a way that jeopardizes compliance, you will know about it and be able to take the necessary measures.

## Consent

Explicit consent is a very important principle of the GDPR. If you are using CallTrackingMetrics' FormReactor®, be sure to include language in the form that explains to people what you are doing with their information and use a check box to gain their consent. That consent is then logged for your records.

In the same vein, you can manage Do Not Call/contact lists from CallTrackingMetrics so that if a data subject does not want to be contacted, you can comply with that request in your outbound calling and texting campaigns.

## Secure Access to Recordings

Call recordings can often be a source of personal information. Therefore, it's important to add additional layers of security around who can access them.

In addition to requiring login to click on any recording URL, we recommend adding a security PIN and expiring the URL's, eliminating the risk of links that might be out there in email inboxes.

# The Bottom Line

## Securing data is just good business.

The full impact of the GDPR both on our European counterparts and your own business interests has yet to be seen, but as the global economy grows ever more dependent on data, it makes business sense to protect consumers' interests—even as we leverage their data to streamline their experiences and better serve their needs.

By taking sensible precautions, your marketing, service, or sales department can navigate the GDPR—and any other regulatory push that emerges from our digital economy—without negatively impacting buyers or businesses.



Learn how CTM is helping over 100,000 clients around the globe increase conversions while enhancing their call management and security.

[Book a Demo](#)



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