

**syrenis**

# Marketer's guide to consent and preferences

Guide



# The case for consent and preference management

Marketers have a hard job.

The purpose of marketing, of course, ultimately is to convince people to buy their company's products. Though that seems like a straightforward goal, the challenge lies in the 'how.'

For example, a marketer must identify the right message that will resonate with the customer. Unfortunately, most customers have different needs and requirements, so it is unlikely that a single message will resonate with everyone. This means that a marketer must not only build a compelling message, but they must actually build a variety of compelling messages, customized to each potential customer.

Similarly, a marketer must identify the channels through which to communicate these messages.

Again, not all potential customers visit the same websites, participate equally in social media, listen or watch the same radio and television, and drive along the same highways.

To make media selection even more complicated, new technologies bring new opportunities to market, so media spend options today are not just tied to traditional news and entertainment or billboard spots. Now there are what seems like an endless variety of online apps, streaming services, and technology-based marketing opportunities from which to choose.

Since companies rarely have unlimited funds to burn, marketers must carefully evaluate what can be an ever-changing picture of the return on each marketing dollar. Establishing a direct connection between a marketing campaign or event and a rise in sales can be challenging, as other factors can influence customer purchasing behavior, but today's technology can help marketers evaluate campaign effectiveness. This means that marketers also have to be technology and statistic experts in order to take advantage of these opportunities and make sense of the analytics data.

Underscoring this, a marketer needs accurate data. Where direct contact is integral to the marketing experience, a marketer needs valid contact information. In order to understand which channel, message and cadence is appropriate, a marketer needs behavioral information about the individual in question. Since laws apply to direct (and digital) marketing, a marketer also needs information about what types of rights they have to use contact and other behavioral data about each individual.



Some, if not all, of these types of information that are so central to successful marketing are most likely to be accurate if the consumer themselves provides it to the company directly.

Though there are data brokers that can provide robust customer profiles, including contact information and suggestions for appropriate channels and messages, these data brokers generally develop profiles from a conglomeration of multiple data sources. And there have been recent scenarios whereby they didn't actually have user consent to collate and share this data.

As each individual has slightly different expectations about interactions with one versus another company and may change over time, that profile based on a combination of (sometimes outdated) information may only somewhat apply to the purchasing company.

However, when an individual has the opportunity to interact directly with a company, that individual can express personal preferences and consents that apply directly to that company and are exactly accurate in context.

There is no guessing, extrapolating, or averaging. In other words, the easiest, most accurate way to get information about a person is to ask them.

**This is why consent and preference management means so much to marketers.**



## The role of consent in marketing

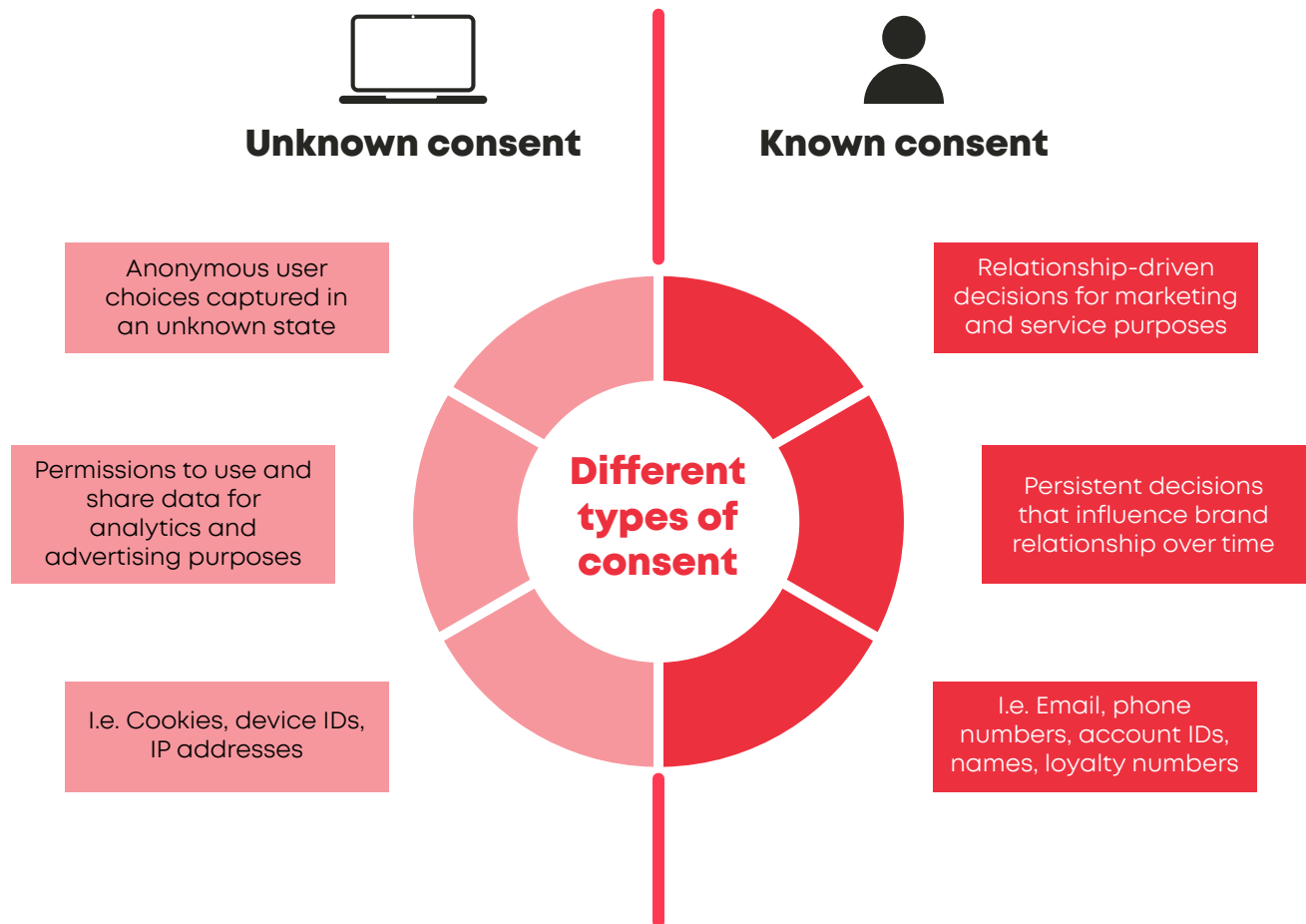
Consent in the privacy and marketing context is permission from the individual in question to take some action with that individual's personal data.

Examples of consent in marketing is asking for and receiving permission to email marketing messages, or allowing individuals to say "no" to third party advertising cookies.

Most jurisdictions have requirements about direct (and sometimes indirect) marketing and consents. These laws give people the right to at least say no to direct marketing, sometimes require individuals to explicitly say yes to direct marketing, and also give people the right to say yes or no to practices like profiling, automated decision making, and targeted advertising.

Preferences, on the other hand, relate less to a legal requirement but rather relates to a wish or desire regarding the what, when, where, and how of the activity.

For example, once an individual gives consent to receive a newsletter, that person may also express a preference for the cadence of that newsletter (once a day, once a week, once a month), content (about shoes, but not socks), timing (in the mornings only), and channel or medium (email, but no postal mail please).



Together, consent and preferences allow an organization to both meet with legal requirements and learn directly from individuals what they want and expect.

A company that thoughtfully asks for consent and preferences no longer has to rely on a third party for legal compliance, or guess which messages, media, and timing will appeal to people.

This certainty in compliance and customer wishes – on an individualized basis – has the potential to reduce marketing spend, increase Return on Investment (ROI), increase sales, and improve engagement.

Even more powerfully, research study after research study show that 1) people care about privacy, and 2) visibility and control over personal data builds trust, which in turn helps people feel comfortable about sharing personal data and interacting (including buying products) with that company.

In other words, data protection done well, which includes offering individual visibility and control over how an organization collects and uses/shares personal data (consent and preferences), positively impacts measurable outcomes like revenue and profit.

# Deloitte recently carried out research in this area specifically



## Outcomes from data protection done poorly

Organizations that experience negative trust events, like data breaches, fall behind peers in value by 26-74 percentage points. These organizations also see their own market cap fall 20-56%.



75%

## Importance of trust

75% of consumers who highly trust a brand are more likely to try that brand's new products and services.



73%

## Value of visibility and control

73% of U.S. consumers report that they would be more comfortable sharing data if they had more visibility and control over their data.

<https://www2.deloitte.com/content/dam/Deloitte/us/Documents/Advisory/us-advisory-navigating-trust.pdf>

# Operational challenges and strategies

Understanding that offering consent and preferences to consumers will decrease marketing spend while still increasing revenues and profits is one thing: it is quite another to turn this need into reality.

However, recognizing the possible obstacles in advance and planning for overcoming them can help operationalize consent and preference management in a way that realizes the ultimate business goals.

## Key challenges for marketers to overcome

### Legacy systems

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Most organizations have been capturing data for a significant amount of time. Over that time, privacy laws, available technologies, and data analysis sophistication have evolved significantly.

This means that most organizations have multiple legacy systems holding multiple legacy data sets. These systems may recognize consents and preferences differently from one another, and in some cases they may not all recognize preferences and consents at all, or they may recognize at a higher level of granularity.

Moreover, organizations that support multiple legacy systems also find themselves facing the challenge of not having certainty about which is the source of truth for any existing preference and consent flags. These problems can translate into compliance issues and, for the conservative organization that applies the most restrictive option where there is uncertainty across the ecosystem, a significant reduction in data flexibility.



## Siloed tech stacks

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A related challenge often associated with legacy data systems is that of siloed tech stacks. At the highest level, a **technology stack**, or tech stack, is a collection of software tools, frameworks, languages, and other technologies that work together for a common purpose.

When different tech stacks develop independently over time, sometimes solving for slightly different issues, they may not talk with one another. Since by their very nature, privacy consent and preference signals must work across all systems that house or take action on personal data, tech stack siloes increase the difficulty level when trying to operationalize privacy rights.

## Cross-enterprise collaboration

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Speaking of siloes, it is not just technologies that have to talk with one another in order to make privacy consents and preferences work seamlessly. People have to talk with one another as well, crossing role, department, and level boundaries.

Data, as the power cell of business, impacts the whole operation. This means that everyone has a stake in the privacy game – Sales, Marketing, Customer Support, Operations, IT/IS, Privacy, Legal, Web Design, Customer Experience, and many other roles are critical in end-to-end privacy consent and preference management.

Without cross-enterprise collaboration, it is likely that any solution will lack in compliance, business operations improvements, customer experience, security, necessary integrations, and/or data flexibility.

## Conflicting customer strategies

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Another issue that marketers face is that of conflicting customer strategies. That is, today we all face an increasingly complex world of marketing channels/media, types of relationships (consumer and third party), primary and secondary data uses, and data monetization.

Frequently, organizations handle this complexity – and the deep, specialized knowledge it takes to manage it – by creating centers of excellence over fairly narrow slices of these domains. There is frequently a digital marketing team, for example, that is separate from an after-sales team, that is separate from a handraiser management team, and so on.

Without a strong, centralized customer/consumer strategy to unite these efforts, the company risks each specialty implementing siloed activities in a vacuum. This results in a Frankenstein set of consumer preference and consent experiences.



# 4 ways to address these challenges

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However, recognizing the possible obstacles in advance and planning for overcoming them can help operationalize consent and preference management in a way that realizes the ultimate business goals.

## 1. Develop overarching first-party data strategy

As with most large and complex activities, this effort should begin with strategy. A thoughtful strategy will be both the guiding light that garners executive support and the glue that helps multiple teams navigate complicated questions in a consistent way. Moreover, the most successful strategy is not just a general marketing strategy, but a first-party data strategy. The organization must consider how direct interactions with individuals, giving those individuals the information and control they need over their own data, can drive the consumer trust and business goals simultaneously while considering all data subject types/relationships, and channels/media.

## 2. Create a robust consumer identity and access management infrastructure

“Know your customer” is a bit of a truism in marketing, but it is a truism that bears consideration here. In order to understand consumer preferences and consents and take action on them, there has to be in place a robust identity and access management infrastructure. Especially where individuals can express preferences and consents across multiple channels and over time as their relationship with the organization changes – but expect the organization to link those preferences and consents together seamlessly over time and across channels – an effective identify/access management infrastructure is essential.

Ironically, a privacy-sensitive organization can have a harder time understanding the ‘who’ of someone who has made a request related to their personal data, especially early in the sales funnel where the organization (by design) collects a minimum amount of data on that individual. However, strong consent/preference management technologies and techniques are available to help balance identity management with privacy concerns.

### 3. Centralize customer consent and preference management

The only way to have a consistent, reliable way of applying preferences and consents across a complicated consumer ecosystem is to have a single source of truth for that information. Especially when centralizing legacy systems that previously have not communicated with one another, the process to centralize consent and preference management can be time consuming and demand thought from people across the organization. However, this is time well spent and is essential for creating a united, consistent, and compliant approach to data management.

### 4. Encourage cross functional decisions and communication

Finally, and perhaps most importantly, communication across functions is critical for all of the preceding activities. Different organizations may find other mechanisms useful to encourage communication while facilitating effective decision making, but here are a few common structures that can help:

- Data Governance Committee or Privacy Review Board – often a cross functional team that makes decisions and receives metrics on consent and preference management, as well as provides operational guidance related to data collection, use, and sharing.
- Customer/Consumer Experience Committee – also a cross functional team that regularly reviews the end-to-end customer experience, including but not limited to consent and preference experiences.
- Customer Strategy/Journey Board – similar to a customer/consumer experience committee, this structure helps gather together business leaders and technology experts on a regular basis to review and adjust goals related to the relationship the organization has with all of its various data subjects.
- Privacy By Design Program – generally a cross functional process that reviews all new data collection, sharing, and use systems/experiences for all things privacy, including consent and preference management. These programs often support a developmental advisory process as well as an after-the-fact review/audit on a regular basis.

These support structures are just some ways in which organizations encourage centralized but cross functional communication and decision making. Combined with the right technologies, dedication to strategy, and focus on identity management, these tips can help marketers create the relationship with data subjects that leads to successful, efficient, and compliant marketing end goals.



# Unlock the power of **insight**

Cassie is the **Consent and Preference Management Platform** powered by Syrenis that goes beyond compliance to create the conditions that unlock customer insight.

We are trusted to manage over 1.2 billion data records by global enterprises who handle high-volume, complex data worldwide. These companies are innovators, using Cassie as a foundation to transform customer experience, increase sales and add ancillary revenue streams.

## With Cassie, you can:



**Comply:** Seamlessly collect and centralize customer consent and preferences, creating a real-time single source of truth that meets the requirements of regulations worldwide, including GDPR, CCPA, HIPAA



**Understand:** Use your consent and preference data to build a full picture of your customers across systems, third-party suppliers and channels, gaining new insight and understanding



**Innovate:** Armed with this insight, you can develop new ways to enhance customer experience, delivering more effective and personalized communication and exploring other revenue generating opportunities

## Gartner®

Recognized by Gartner® as a market leader in consent management:

“Fully customizable, Cassie has developed a deep and rich feature set across all four service categories especially where integration is concerned, equally handling data from legacy systems through data loader functions and complex CRM APIs.”

*Consent and Preference Management Market Guide*

## Go beyond compliance

Learn more about how we can help you achieve compliance and leverage your data to create a competitive advantage. Our dedicated team of experts are here to guide you every step of the way.

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