

cassie

Stakeholder use cases for consent in Pharmaceuticals



Guide

Introduction

Knowing you need a consent management platform is only the beginning of the project. The real work begins when you need to get your board and key stakeholders on board.

For global pharmaceuticals, there are many moving parts within the project that need to be fully considered before selecting a vendor.

From the marketing team working to drive brand awareness, to the healthcare providers (HCPs) and medical practitioners working day-to-day with patients, through to the IT teams that need to implement and integrate the technology.

Use cases serve as a bridge between these different stakeholders, fostering better communication and collaboration. They provide a common language that both technical and non-technical team members can understand, ensuring that everyone is aligned on the objectives and requirements of a project. This alignment is essential for avoiding misunderstandings and ensuring that the final product meets the expectations of all stakeholders.

To help you consider particular use cases when it comes to consent, we've covered the high priority stakeholders within pharmaceutical organizations, their key challenges and how Cassie can help solve them...



Stakeholder #1:

Millie the Marketer



Marketers can leverage consent management to build trust, enhance personalization, and ensure compliance. Managing consent is not just a regulatory requirement but can become a strategic advantage.

As pharmaceuticals continue to grow and evolve, for example through direct-to-consumer offerings, there are many hurdles that Millie faces when building out marketing campaigns and driving brand awareness.

Key challenges

Regulatory compliance:

Navigating GDPR, HIPAA, and other local data privacy laws.

Explicit consent:

Obtaining explicit consent from patients and healthcare professionals, which is time-consuming and intricate.

Multiple channels:

Managing consent across digital marketing campaigns, clinical trial recruitment, and patient engagement platforms.

Data integrity and security:

Handling vast amounts of sensitive data, including patient health records, genetic information, and clinical trial data.

Building trust:

Enhancing marketing effectiveness by ensuring communications are relevant and respectful of patient preferences.

Marketer Millie's specific use cases for consent

How the Cassie platform helps

"I want to know, before sending a communication to a HCP, whether this communication may be sent on the specified channel, channel value, and topic in accordance with consent rules for that HCP"

Strategic decision-making:

Cassie stores all consent and preference data centrally, with the ability to use APIs to check specific choices of individual data subjects as well as the option to push consent changes to downstream systems for up-to-date accuracy

"I want to know the status of all consents for one or more HCPs including all channels at any given time"

Accurate compliance:

Cassie's Customer Service Portal provides a complete audit trail of current and past consent status of all data subjects, including granular details like what they consented to, when, where and why

"I want changes to a HCPs consents to be applied in all systems and channels immediately"

Enhanced data accuracy:

Consent changes are immediately sent back to Cassie via APIs. Cassie then ensures that all systems and channels are updated with the latest consent information, providing a seamless and compliant experience

"I want to tailor the content, channel, and frequency of communications to a HCP based on their chosen preferences"

Preference-powered personalization:

Cassie can provide extended preferences and attach unlimited meta data to any consent. For example, you can add additional questions to consent statements, allowing data subjects to provide more personalized responses. A typical use case is asking if they wish to receive newsletters, followed by options on frequency and content preferences

"I want to provide the HCP with the possibility to modify their own consents and preferences without employee interaction (e.g. via a self-service portal)"

Improved user experience and operational efficiencies:

Cassie's out-of-the-box Customer Portal allows data subjects to update and change their consents and preferences with secure 2FA, immediately reflecting changes across your integrated systems

Stakeholder #2:

Alan the Architect



For Solution Architects, mastering consent management offers significant commercial benefits. Ensuring compliance with regulations like GDPR and HIPAA helps avoid fines and enhances the organization's reputation.

Efficient systems reduce manual effort and errors, leading to cost savings and allowing IT teams to focus on strategic initiatives. Robust data protection measures prevent breaches, mitigating financial and reputational risks.

Key challenges

Regulatory compliance:

Ensuring adherence to global data privacy regulations like GDPR and HIPAA.

Data governance:

Implementing frameworks for the compliant collection, storage, and processing of personal data.

Omnichannel integration:

Integrating consent management across various channels, including digital marketing, clinical trials, and patient engagement platforms.

Data security:

Architecting robust security measures to protect sensitive data, such as patient health records and genetic information.

Risk mitigation:

Addressing potential legal liabilities, financial losses, and reputational damage from data breaches or misuse.

Security protocols:

Implementing encryption, access controls, and regular audits to ensure data protection.

Transparency and trust:

Developing transparent consent processes to inform patients about data usage.

Strategic alignment:

Aligning data privacy and consent management strategies with overall business goals to enhance marketing effectiveness and build trust.

Architect Alan's specific use cases for consent

How the Cassie platform helps

"I want the CPM to understand differences across regions or countries and be aware of default settings and any specific local requirements"

Country-specific flexibility:

Cassie is multi-jurisdictional and can be configured per country or region to adhere to different legislative requirements to ensure that your consent management practices are both compliant and efficient, tailored to the specific needs of each region.

"I want consuming systems to query the CPM rather than synchronize the data; an API 'above' data integration with high system availability across the year"

Reliable real-time data access:

Cassie has an API-first architecture that allows downstream systems to query Cassie directly, ensuring consuming systems always have the most up-to-date information without the need for data synchronization. Cassie is fully customizable to meet specific business requirements and workflows with 99.9% system availability to ensure consistent and reliable access to data.

"I want visibility on what systems collect and police which channels"

Enhanced oversight and informed decision-making:

Cassie's Connector Service provides clear visibility into which systems are collecting and managing consent data across various channels and downstream systems, allowing for better control of data flows within your digital estate as well as facilitating greater understanding of data triggers and flows.

"I want to add channels, consents, purposes, and all other metadata easily"

Tailor consent processes and improve engagement:

Cassie's flexible metadata management allows you to create unlimited metadata related to consent within our out-of-the-box administration portal to manage channels, consents and purposes. Visible metadata provides extra information to customize consent requirements based on legislation or user experience whilst invisible metadata tracks things like device used and country of origin.

Architect Alan's specific use cases for consent

How the Cassie platform helps

"I want a flexible system to integrate any new platforms in the future (like business intelligence platforms capturing and consuming consents and preferences)"

Future-proof customization and scalability:

Cassie can connect to any system using RESTful APIs as well as the Connector Service that enables data to be pushed out of Cassie via customizable triggers. New BI systems can be integrated seamlessly, supporting future growth and technological advancements. Full customization gives business control in how and when data is shared.

"I want to be able to use multiple Customer Data Systems (with different IDs) as a reference for Consents and Preferences"

Improved data consistency:

Cassie can store and match unlimited identifiers across any third-party system to enable flexibility in how you link contacts between Cassie and your digital estate.

"I want similar concepts represented in the same manner across OPUs, thereby increasing data standardization and ensuing analytics and reporting"

Optimum data standardization:

Select the export standard within Cassie's Export Module to ensure a seamless transition of data from Cassie to your analytical and reporting applications.

Stakeholder #3: Dana the DPO



Of course, for a legal team, compliance is the main objective. DPOs must ensure that consent mechanisms are compliant, transparent, and easily accessible to individuals, which can be particularly challenging in a multi-channel environment where data is collected through various platforms, including websites, mobile apps, and CRM systems. This on top of the constantly evolving legislative landscape, with regional variances to consider.

Ultimately, these efforts not only help in meeting regulatory requirements but also position the organization as a leader in ethical data practices, contributing to its overall reputation and success.

Key challenges

Compliance with complex global regulations:

Ensuring that consent mechanisms comply with global data privacy diverse regulations requires continuous monitoring and updates.

Maintaining up-to-date consent records:

DPOs must ensure that consent statuses are tracked in real-time and that records are easily accessible for audits.

Managing consent across multiple channels:

Customers interact with organizations through various channels, each requiring its consent management approach.

Ensuring transparency and clarity:

Communicating data collection and usage practices in a transparent and understandable manner is crucial.

DPO Dana's specific use cases for consent

How the Cassie platform helps

"As a legal/compliance expert, I want to ensure that the data that BI collects about the customers is compliant with all local privacy laws (e.g. GDPR, California, etc.), so that customer's privacy is respected."

Respect customer privacy to build trust:

Cassie allows you to customize the information it collects from data subjects based on their location. By dynamically adjusting data collection forms to meet specific legal requirements in different regions, you reduce the risk of non-compliance and potential legal penalties.

"I need the ability to create and customize consent forms to meet specific legal and business requirements."

Enhanced compliance and user experience:

Through Cassie's flexible admin portal, you can design consent forms tailored to various regulatory standards and business needs. This includes the ability to add custom fields, modify consent language, and configure different consent models for different jurisdictions.

"I need a straightforward process for users to withdraw their consent at any time."

Easy consent modification and user empowerment:

Cassie provides a user-friendly process for withdrawing consent at any time. Users can easily access their consent preferences through a dedicated self-service preference portal that can be embedded within your site or self-standing. Admins can also use the Customer Service Portal to manually process consent change requests or withdrawals.

"I need the platform to support Universal Opt-Out Mechanisms, such as Global Privacy Controls, to ensure compliance with user preferences for data privacy across all jurisdictions."

Cross-jurisdictional compliance:

With 'Follow Me' consent, Cassie connects consent of known users across every digital touchpoint to enable brands to replicate and honor preferences across multiple devices, ensuring compliance with Opt-Out Preference signals (like GPC).

DPO Dana's specific use cases for consent

How the Cassie platform helps

"I require detailed audit trails to document when and how consent was obtained and any changes made"

Documented accountability and auditability:

Cassie provides detailed audit trails to document when and how consent was obtained, as well as any changes made to consent preferences. This feature ensures that every action related to consent is recorded with precise timestamps and contextual information.

Stakeholder #4:

Martin the Medical Practitioner



For medical practitioners and executives in the pharmaceutical industry, consent management is a critical aspect of patient care and data handling. One of the key themes is patient autonomy.

Ensuring that patients are fully informed and voluntarily provide consent for treatments and data usage is fundamental to ethical medical practice. This involves clear communication about the risks, benefits, and alternatives of proposed treatments, as well as the purposes for which their data will be used.

Key challenges

Compliance with complex global regulations:

As per all departments, the regulatory landscape is a challenge. HIPAA and newer legislation like Washington's My Health, My Data Act mean medical practitioners need to ensure that consent forms meet all legal requirements and are updated regularly to reflect changes

Patient understanding and engagement:

Ensuring that patients fully understand the consent forms and the implications of their consent can be difficult. Medical jargon and complex information can overwhelm patients, leading to incomplete or uninformed consent

Data integration across systems:

Managing consent across multiple systems and platforms (often legacy) can lead to fragmented data.

Maintaining up-to-date records:

Keeping consent records current and ensuring that any changes in patient preferences are promptly updated across all systems can be logistically challenging. This is especially important in dynamic environments like clinical trials where patient consent may change frequently.

Medical Practitioner Martin's specific use cases for consent

How the Cassie platform helps

"I want to differentiate between email communications coming from Commercial Reps (FuE) from mass mailing communications (HoE)"

Clear communication management:

Cassie allows you to segregate communications at a channel level. You can create a parent channel for Commercial Reps and another for mass mailing. Consents attached under each parent channel can then be differentiated.

"I want to prevent any consent and preference changes by MSL impacting Commercial Reps and vice versa (unless it is at the HCP or entire channel level)"

Role-specific visibility controls:

Cassie allows you to showcase only specific channels and consent statements based on the persona attached to the data subject. This ensures that consent options are displayed according to the account role, preventing changes in one area from impacting another.

"I want to govern entries for which preferences can be collected in e.g. individual websites/portals, depending on the focus of the website itself."

Bespoke consent methods for operational flexibility:

Cassie allows you to provide a bespoke consent obtainment method based on the website it is deployed on and the focus of the page. This is achieved by creating multiple preference widgets and utilizing them on the appropriate corresponding pages.

"I want to ensure that patient consent forms are clear and easy to understand, so that patients can make informed decisions about their treatment."

Preference-powered personalization:

Cassie provides customizable consent forms that can be tailored to be clear and user-friendly. This ensures that patients fully understand the information presented to them, including the risks, benefits, and alternatives of their treatment options.

Stakeholder #5:

Diego the Data Steward



For data stewards, consent management is a critical aspect of their role, focusing on ensuring data integrity, compliance, and effective data governance.

One of the key themes is data accuracy and consistency. Data stewards must ensure that consent data is accurately recorded, maintained, and synchronized across all systems. This involves implementing data validation processes and regular audits to prevent discrepancies and ensure that all consent records are up-to-date and reliable.

Key challenges

Data accuracy and consistency:

Ensuring that consent data is accurately recorded, maintained, and synchronized across all systems to prevent discrepancies.

Regulatory compliance:

Ensuring compliance with complex data privacy regulations like GDPR and HIPAA, and ensuring that consent management practices adhere to these laws.

Data security:

Protecting sensitive consent information from unauthorized access and breaches through strong encryption, access controls, and monitoring mechanisms.

Audit and reporting:

Maintaining detailed records of consent and facilitating easy access for audits and reporting to demonstrate compliance and accountability.

Data Steward Diego's specific use cases for consent

How the Cassie platform helps

"I need a single location to access all consents and preferences for a given customer, along with details on when each was added and by which system or user."

Improved data governance:

Cassie's Customer Service Portal provides a centralized location to review all consents and preferences for a given data subject. This includes viewing specific branded preferences as well as consents across all brands. The portal also records the source type for each consent, allowing you to see whether an internal user or the data subject made the change.

"I want to know how to locate the impacted Customer in the relevant Customer Data Management System (CRM, One Identity)"

Streamlined data management:

Cassie can store unique identifiers from external systems against a data subject. When reviewing consents in the Customer Service Portal, you can see these external IDs and use them to search for the data subject in your third-party system.

"I want to have a bulk upload capability to update/edit the consents and preferences if needed."

Improve efficiency and operational ease:

Cassie offers a bulk data uploader that allows you to upload .csv files containing data subject consents/preferences or personal data. This feature is typically used for bulk uploading legacy data but can also be utilized to update current preferences as needed.

"I need the ability to update or edit consents and preferences for a given customer, including the update date and reason for the change, based on requests from known sources (e.g., email requests from an HCP) as well as the ability to track all changes."

Reason documentation for full auditability:

When updating consent or preferences for a data subject, you can attach a statement to the request to document the reason for the amendment. Additionally, Cassie provides a customizable drop-down list of common methods through which data subjects might submit update requests, such as email, post, or face-to-face interactions.

Data Steward Diego's specific use cases for consent

How the Cassie platform helps

"I want to manage consents and Preferences for medical purposes independent of commercial purposes."

Customizable solutions tailored to your needs:

Cassie offers the flexibility to segregate data either by brands or by setting up parent channels to differentiate between medical and commercial consent options. Regardless of the chosen method, each consent purpose can be configured to display separately within the Customer Service Portal when reviewing a data subject's consent.

Meet Cassie: The CMP built to centralize consent

Powered by Syrenis, Cassie is a Consent Management Platform (CMP) that centrally manages over 1.2 billion customer records for organizations handling high-volume, complex data worldwide.

With Cassie, businesses can:

- ▶ Centralize consent data in real-time across systems, third-party suppliers and channels
- ▶ Deliver more effective and personalized communications when consumers want it
- ▶ Achieve global compliance with data privacy regulations like GDPR, CCPA and HIPAA

With Cassie, you're in control. The platform can be as complex or as simple as you need it to be, with out-of-the-box functionality as well as advanced configurability to meet business needs.

[Book a demo](#)

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*

Gartner®



Compliance without compromise

If you would like to learn more about how we can help you on your compliance journey, our team of dedicated consent and preference management experts will be able to guide you every step of the way.

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