



GDPR & The Coaches Console

What You Need To Know & What You Need To Do



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Agenda

PART I: What you need to KNOW

- ✓ What is GDPR – a quick overview
- ✓ What information does the GDPR apply to?
- ✓ What does the GDPR do?
- ✓ The 6 Data Principles
- ✓ How does the GDPR Impact your business?

PART III: TCC Features

- ✓ Existing Features
- ✓ New Features

PART II: What you need to DO

- ✓ GDPR Compliance,
- ✓ Consent,
- ✓ What to do with your existing contact list,
- ✓ What to do to keep collecting names on your contact list,
- ✓ Your privacy policy

PART IV: Resources & Checklist

- ✓ Recap of the 4 Steps to Take
- ✓ Templates just for you
- ✓ A GDPR Checklist





**KEEP
CALM
AND
PREPARE
FOR
GDPR**

A blurred background image of a business meeting. In the foreground, a person's hands are typing on a laptop keyboard. In the background, several people are gathered around a table, looking at documents and laptops. The scene is brightly lit, possibly by natural light from a window. Overlaid on the image are faint white geometric patterns, including circles and vertical lines, and a semi-transparent dark blue bar at the bottom.

PART I:
What You Need To KNOW

What is GDPR?

- ✓ “The General Data Protection Regulation” is a privacy law from the European Union that goes into effect May 25, 2018.
- ✓ Its goal is to protect the data privacy and security of all EU persons by setting a new data protection standard for business and governments.

Compliance

Any organization that processes, stores, accesses or hosts the personal data of EU residents ***regardless*** of the organization's ***physical*** location

What Information Does The GDPR Apply To?

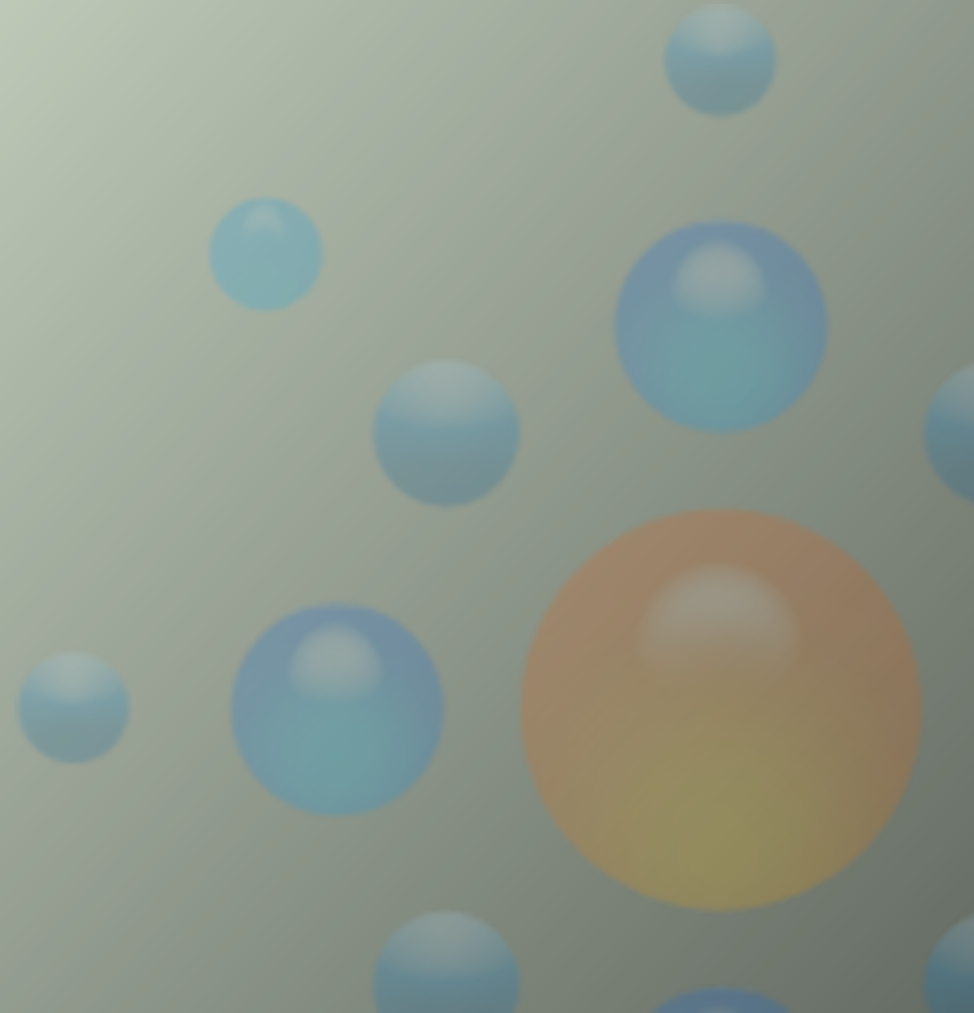
- ➔ ✓ **Personal Data** - any information relating to an identifiable person.
- ✓ **Sensitive Data** -special categories of personal data (genetic and biometric data as examples)

What Does The GDPR Do?

The GDPR gives EU Persons more rights and protections for their personal data. These include:

- ✓ The right to be informed
- ✓ The right of access
- ✓ The right to rectify
- ✓ The right to be forgotten
- ✓ The right to restrict processing
- ✓ The right to data portability
- ✓ The right to object

The 6 GDPR Data Protection Principles



Data Shall Be...

- 1 ... processed “lawfully, fairly and in a transparent manner.”
- 2 ... “collected for specified, explicit and legitimate purposes.”
- 3 ... “limited to what is necessary” for the purpose.
- 4 ... accurate, kept up to date and corrected.
- 5 ... kept so it identifies a person “no longer than is necessary.”
- 6 ... “processed in a manner than ensures appropriate security.”

How Does GDPR Impact Your Business?

You may need to change the way you collect leads.

- ✓ Consent must be freely given, specific, explicit and unambiguous
- ✓ Someone downloading a lead magnet from you does not equate to consent to be added to your general email list.

How Does GDPR Impact Your Business?

You will need to get consent from existing EU (and unknown) persons

- ✓ The GDPR regulations are retroactive; effective May 25, 2018.
- ✓ Anyone from the EU (or unknown) that you are not able to prove explicit consent, must re-opt in to your mailing list to remain on your list
- ✓ If you live in the EU = all contacts treated the same

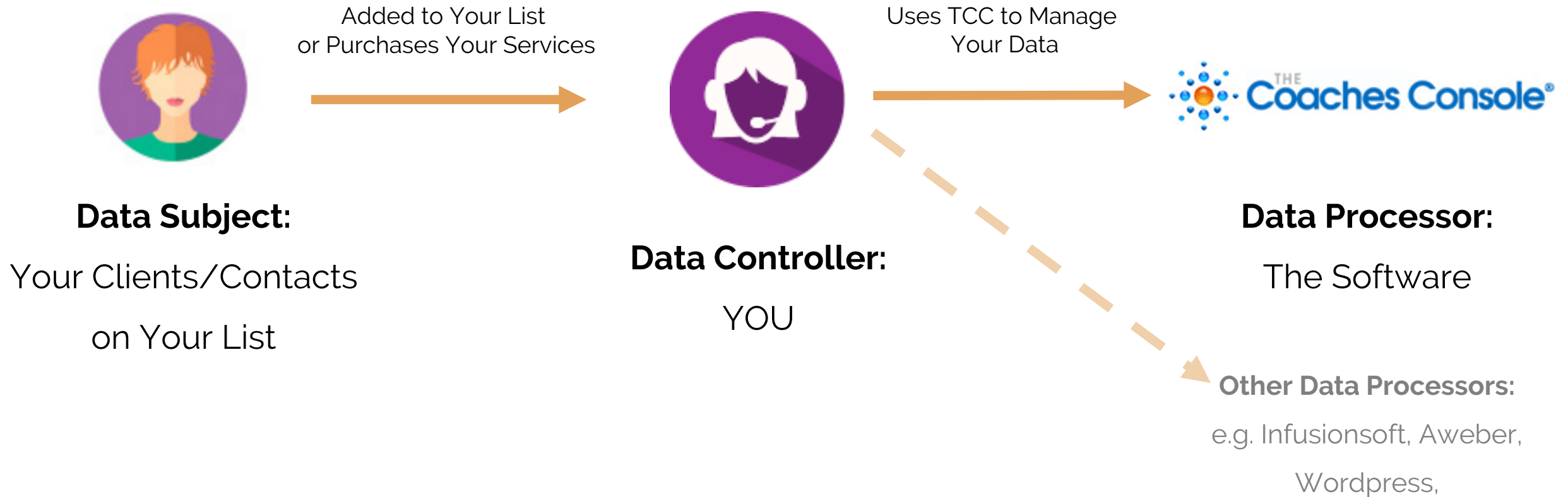
How Does GDPR Impact Your Business?

You may need to add or update a Privacy Policy to your website

- ✓ You are required to inform people of certain information at the time they opt in.
- ✓ The Privacy Policy is the tool to meet this requirement.

You **MUST** take responsibility
to have a **good quality list** and
communicate quality content
with people that
have agreed to and are
expecting to receive it.

Roles & Responsibilities



As A Data Controller...

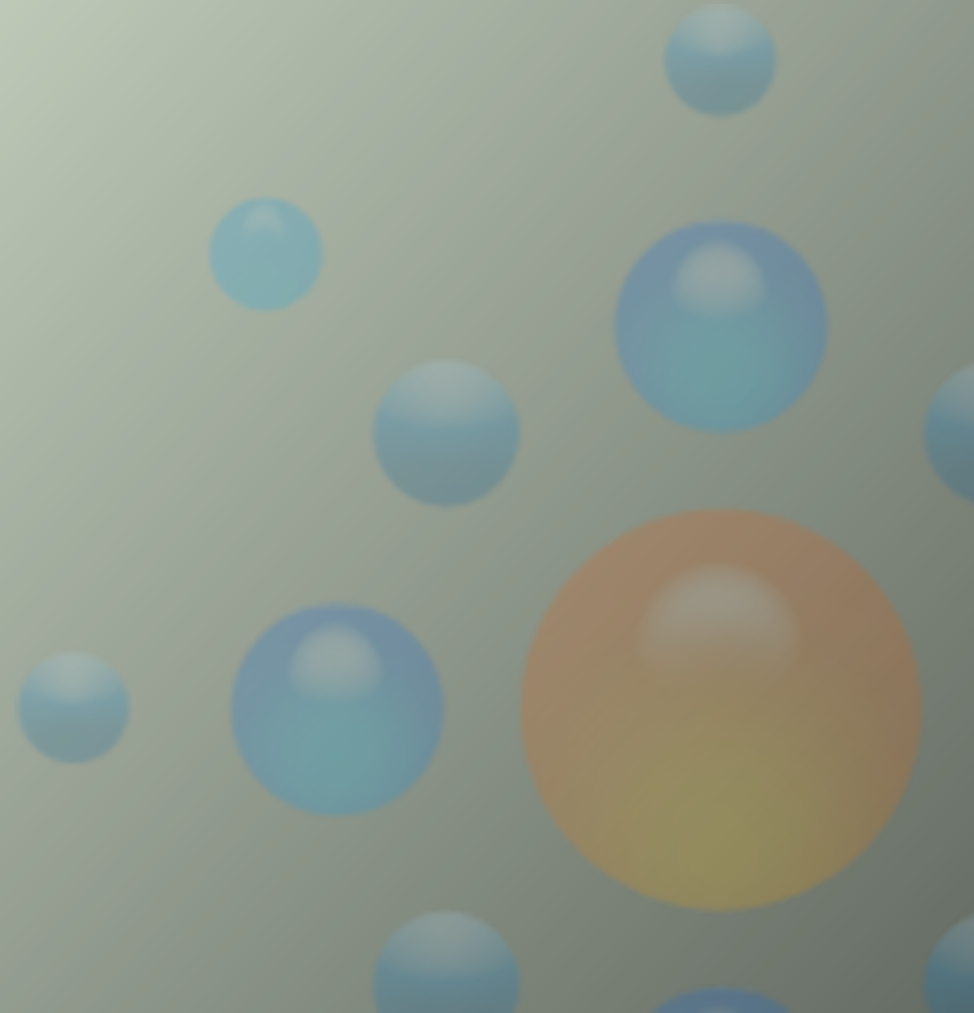


Data Controller:

YOU

- ✓ Comply with data laws regarding the fair and lawful processing of personal data for specific and legitimate purposes.
- ✓ Protect personal data against compromise or loss
- ✓ Have a contract with Data Processors that require them to act only on your instructions

Security



A blurred background image of a business meeting. In the foreground, a person's hands are typing on a laptop keyboard. In the background, two other people are looking at a laptop screen. The image is overlaid with a semi-transparent grid of white dots and lines, and several vertical white bars of varying heights, resembling a bar chart or data visualization. The overall color palette is warm and professional, with soft lighting.

PART II:
What You Need To DO

GDPR Compliance

- ✓ **Explicit Consent** - You should only collect data for specific purposes and only collect data for as long as necessary to complete that purpose. And you must acquire explicit consent from the person before they submit their personal data.
- ✓ **Separate Consent** - Because consent must be specific and unambiguous, someone downloading a lead magnet from you does not equate to consent to be added to your general email list.

Existing Contact List

- ✓ **STEP 1** – Build goodwill and provide value
- ✓ **STEP 2** – Organize contacts into two “Groups”
- ✓ **STEP 3** – Run a re-engagement campaign
- ✓ **STEP 4** – List hygiene


Adding New Contacts To Your List

- ✓ Use the “Consent Checkbox” on opt in forms to acquire explicit consent
- ✓ Add multiple Consent Checkboxes for various types of consent
- ✓ Use the “Join My Newsletter” opt in form
- ✓ Use the Double Opt In form with language on confirmation email

Privacy Policy

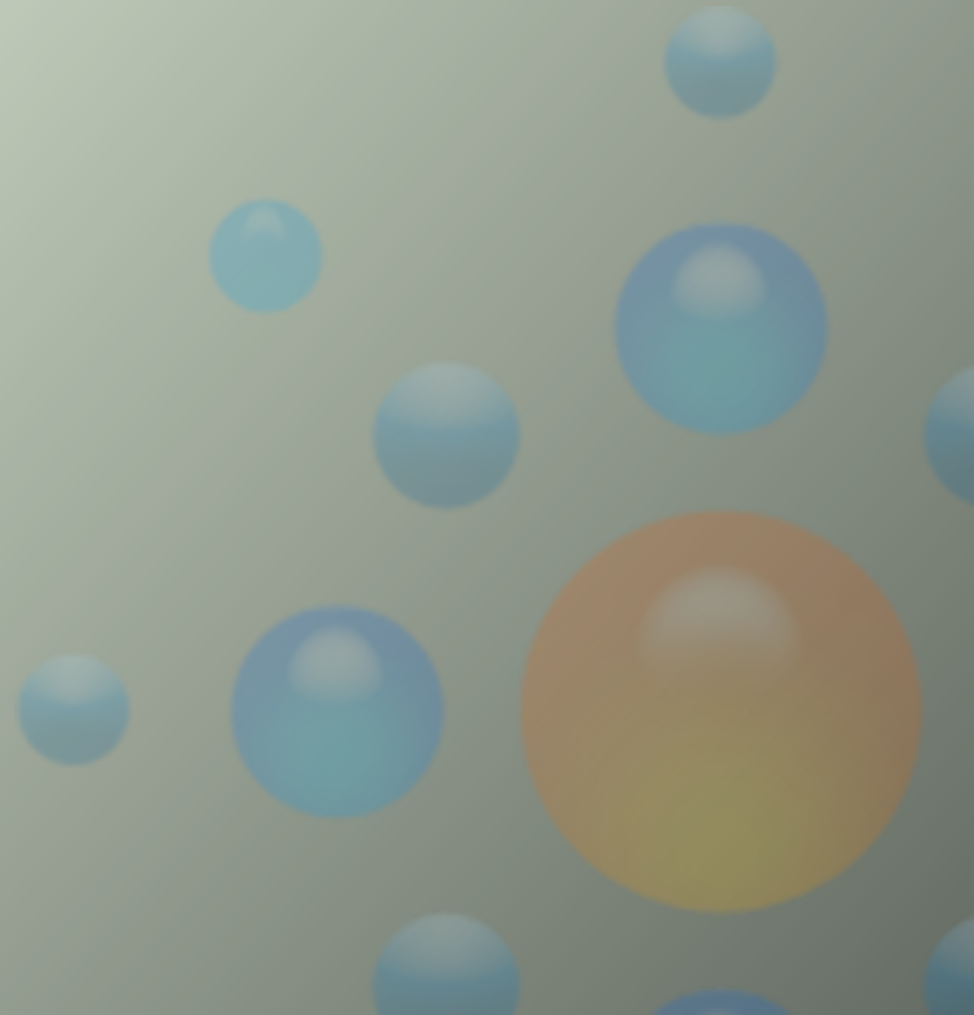
Add or Update a Privacy Policy to your website

- ✓ You are required to inform people of certain information at the time they opt in.
- ✓ The Privacy Policy is the tool to meet this requirement.
- ✓ You must include a link on your opt in pages and your website

A blurred background image of a business meeting. In the foreground, a person's hands are typing on a laptop keyboard. In the background, several people are gathered around a table, looking at a laptop screen. The scene is brightly lit, possibly by natural light from a window. Overlaid on the image are faint, light-colored geometric patterns, including circles and vertical lines, suggesting a digital or data-related theme.

PART III: The Coaches Console Features

Existing TCC Features



RIGHT TO WITHDRAW CONSENT:

Your contacts can unsubscribe in the footer of your communication and manage their subscriptions as well.

Unsubscribe Footer

VIP Coach, you have received this communication because you requested materials from Coaching Beyond. If you do not wish to receive messages from me, please click [unsubscribe](#)

Manage Subscriptions for Helen Ramsey

Newsletter

Subscribe to newsletter

Emails

Receive emails from coach

Autoresponders

1-Existing Client Transition (subscribed on 2017-07-03)

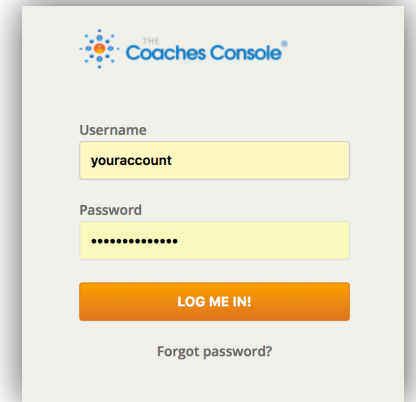
1-New client autoresponder (subscribed on 2016-07-05)

[Unsubscribe from all types of emails](#)

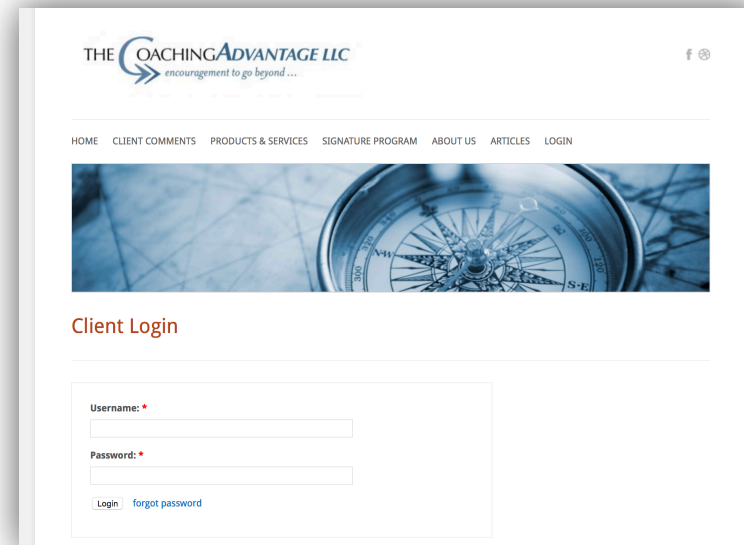
[Update my subscriptions](#)

LAWFULNESS OF PROCESSING:

Using The Coaches Console provides a layer of security for you and your clients.



The Coaches Console logo is at the top left. Below it are two input fields: 'Username' with the text 'youraccount' and 'Password' with masked characters. An orange 'LOG ME IN!' button is below the password field. At the bottom, there is a link for 'Forgot password?'.



The Coaching Advantage LLC logo is at the top left. Below it is a navigation menu with links: HOME, CLIENT COMMENTS, PRODUCTS & SERVICES, SIGNATURE PROGRAM, ABOUT US, ARTICLES, LOGIN. A large image of a compass is below the navigation. The 'Client Login' section has two input fields: 'Username: *' and 'Password: *'. Below the password field are links for 'Login' and 'forgot password'.

EXPLICIT CONSENT:

The **Opt In Thank You Page** MAY be one way you can obtain consent beyond the lead magnet contact is opt'ing in for.

Edit Opt-in: The 3 Massive Mistakes Free Gift

1 Name & Groups 2 Autoresponder Messages 3 Double Optin Confirmation Page **4 Thank You Page** 5 Opt-in Code

Create thank you message


Thank You Message Content

B *I* U ~~S~~ [List Icons] Formats ▾ Droid Sans ▾ 10pt ▾ A ▾ A ▾ [Clipboard Icons] [List Icons]

As Promised...

...your copy of the download is waiting for you in your inbox!

You can also click here to download your free copy of [The 3 Massive Mistakes Small Business Owners Make That Keep Them Working Too Hard!](#) right away, why wait!



Get started NOW!

When you dive into these, be sure to check out the tip on page 8.

This is where so many business owners like yourself tend to get really stuck. I think you'll enjoy this tip!

If you would like to ALSO receive more valuable FREE RESOURCES (such as tips, templates, checklists, documents and more) along with exclusive offers that will support you in your business success, please **CLICK HERE**.

Here's to your success,

Melinda

Words: 152



EXPLICIT CONSENT:

The **Double Opt In** MAY be one way you can obtain consent beyond the lead magnet contact is opt'ing in for.

Edit Opt-in: The 3 Massive Mistakes Free Gift

1 Name & Groups 2 Autoresponder Messages **3 Double Opt-In Confirmation Page** 4 Thank You Page 5

Create Double Opt-In Confirm Page Message

Double Opt-In Confirm Page Content

B *I* U ~~S~~ | | Formats ▾ | Droid Sans ▾ | 10pt ▾ | A ▾ | **A** ▾

| Replacemer

Hey there \$FIRSTNAME\$,

I'm thrilled that you're interested in our **The 3 Massive Mistakes Small Business Owners Make... And How To Avoid Them!**

We treat our contacts interest and information with great care so I just want to confirm your interest before we add you to our

Please confirm your subscription

We need to confirm your email address and consent.

To complete the process, please click the link in the email we just sent you. Then we'll be sure to get your free resource to you

Here's to your success!

Melinda



THE RIGHT TO BE FORGOTTEN:

Deleting a contact from your system is a way to exercise the “right to be forgotten”

The screenshot displays a user interface for a contact profile. At the top, the contact's name 'Helen Ramsey' is shown next to a profile picture. Below the name, there are details about groups and autoresponders. A navigation bar contains tabs for 'Profile', 'Appointments', 'Client Log', 'Email Log', 'Forms', 'Products', 'Courses', 'Agreement', 'Invoices', and 'To Do List'. The 'Client Information' section includes a photo upload area with 'UPLOAD PHOTO' and 'Delete' buttons, and a status selection area with radio buttons for 'Active', 'Inactive', 'Hot Leads', 'Prospects', and 'Buyers'. At the bottom right of this section, there are two buttons: 'MERGE CONTACT' and 'DELETE CONTACT'. A large red arrow points directly to the 'DELETE CONTACT' button.

Helen Ramsey
GROUPS(6): Inner Circle Group Coaching, Membership Group, 8 week teleclass_buyers, Group Coac...
AUTORESPONDERS(2): 1-New client autoresponder, 1-Existing Client Transition [Edit](#)

[Login as Helen](#)
[Send email to Helen](#)

Profile | Appointments | Client Log | Email Log | Forms | Products | Courses | Agreement | Invoices | To Do List

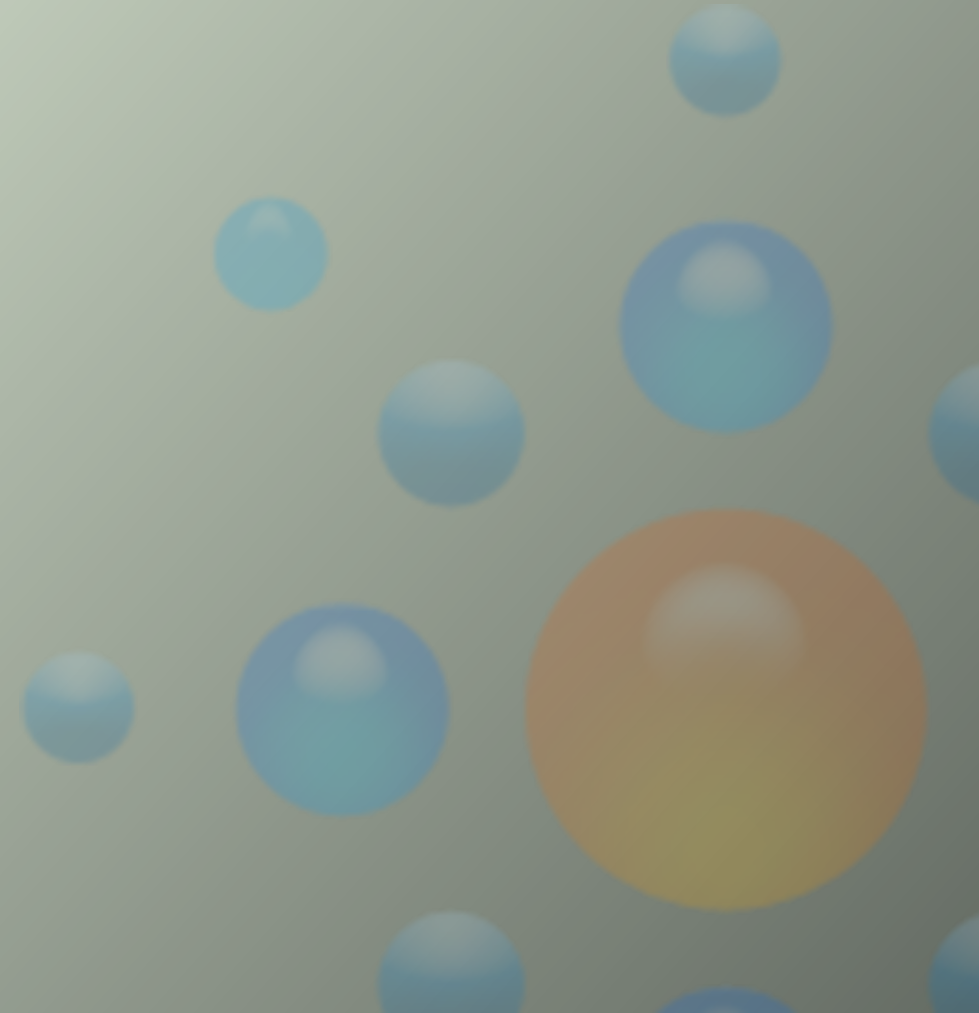
Client Information

Choose new profile photo
[UPLOAD PHOTO](#) [Delete](#)
Photo dimensions: max. 1500x1500, 2MB

Status
 Active Inactive Hot Leads Prospects Buyers

[MERGE CONTACT](#) [DELETE CONTACT](#)

NEW TCC Features



RIGHT TO BE INFORMED:
Privacy Policy Published
on Website and Easily
Accessible

NEW FEATURES

The screenshot shows the Coaches Console dashboard with a sidebar on the left containing navigation options like Dashboard, Contacts, Calendar, Website, Communicate, Billing, Cart, and Reports. The main area is titled 'Pages' and lists various website pages. The 'Privacy Policy' page is highlighted in grey, and a red arrow points to it from the left.

Page Name	URL	Lock Icon	Settings Icon
Forms	forms		
Documents	documents		
Agreements	agreement	🔒	⚙️
Due Invoices	payment	🔒	⚙️
Receipts	payment?action=receipts	🔒	⚙️
Upcoming Payments	payment?action=upcoming_payments	🔒	⚙️
Appointments and available time	calendar	🔒	⚙️
My Products	myproducts	🔒	⚙️
My Course	courses		
Newsletters	newsletters		
Privacy Policy	privacy-policy		

The preview shows the 'Privacy Policy' page with the following content:

Privacy Policy

PRIVACY POLICY

Effective 25nd May 2018 **EDIT EFFECTIVE DATE**

INTRODUCTION

This privacy notice provides you with details of how we collect and process your personal data through your use of **URL OF YOUR SITE: eg: coachname.coachesconsole.com or coachname.com or BOTH**

Website Footer with Link

The screenshot shows the website footer. On the left, there is a profile picture of Cosmin George Costin. On the right, there is a 'Navigation' menu with links to Home, Meet Your Coach, FAQ's, Courage, Risks & Rewards, Newsletters, and Products & Services. Below the navigation menu, the footer text reads: '© 2018. All rights reserved. Privacy Policy Powered by Coaches Console'. A red arrow points to the 'Privacy Policy' link.

EXPLICIT CONSENT:
Only Collect Data For
Specific Purposes

NEW FEATURES

**SIGN UP TO RECEIVE MY
FREE GIFT: AMAZING STUFF**

First Name:

Email

Click here if you would also like to receive other incredible free resources (such as tips, documents, checklist, roadmaps, video trainings and more).

Click here if you would like to also receive awesome, exclusive offers to support you in your quest (such as programs not available to the public, discounted offers, and more)

Submit

Explicit



Granular



DOWNLOAD MY FREE GIFT

First Name:

Email

Yes, I also wish to receive business building tips, free resources and exclusive offers.

Submit

Explicit



EXPLICIT CONSENT:
Only Collect Data For
Specific Purposes

NEW FEATURES

Consent Checkboxes & Groups

Edit Opt-in: Courage, Risks & Rewards Lead Magnet

1 Name & Groups 2 Autoresponder Messages 3 Thank You Page 4 Opt-In Code

Choose a name

Courage, Risks & Rewards Lead Magnet

Notify me via email each time someone opts in

Fields your prospect should fill in:

- First Name
- Last Name
- Email
- Phone Number
- Click here if you would also like to receive other incredible free resources (such as tips, documents, checklist, roadmaps, video trainings and more). (X)
- Click here if you would like to also receive awesome, exclusive offers to support you in your quest (such as programs not available to the public, discounted offers, and more) (X)

ADD CONSENT CHECKBOX FIELDS

Consent Checkbox
Option



EXPLICIT CONSENT:
Only Collect Data For
Specific Purposes

NEW FEATURES

Consent Checkboxes & Groups

Consent Checkbox
GROUP



Click here if you would also like to receive other incredible free resources (such as tips, documents, checklist, roadmaps, video trainings and more).

Click here if you would like to also receive awesome, exclusive offers to support you in your quest (such as programs not available to the public, discounted offers, and more)

Courage, Risks & Rewards Lead Magnet_optin_group

Default Optin Sidebar_optin_group

My Group

My Signature Coaching

My Target Market

My Teleclass

Yes, I also wish to receive business building tips, free resources and exclusive offers.

EXPLICIT CONSENT:
Only Collect Data For
Specific Purposes

NEW FEATURES

Consent Checkboxes & Groups

Consent Checkbox
Contact Profile &
Group



This Group becomes
your "General Mailing
List" that you can
email to regularly.

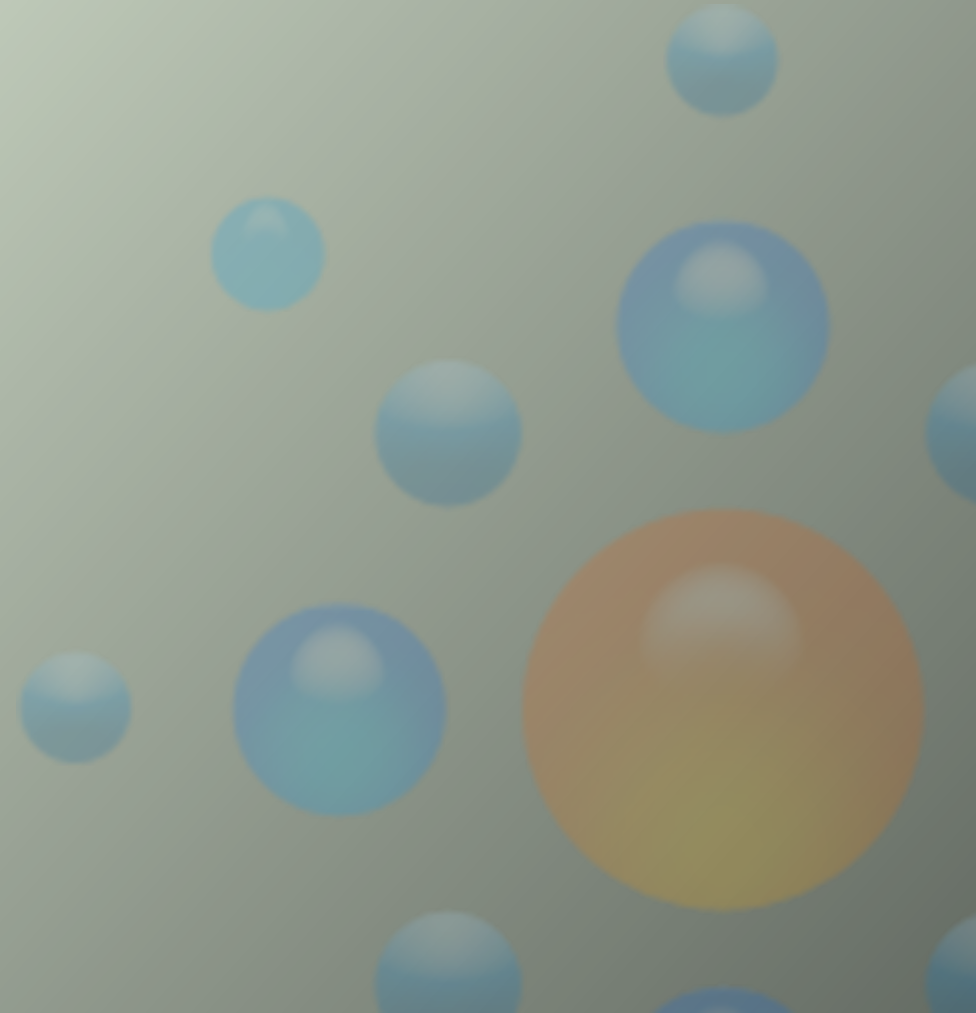


The screenshot shows a user profile for 'Cosmin Bilding Tips'. At the top, there is a header with a profile picture, the name, and links for 'Send email to Cosmin Bilding' and 'Mark as Spam'. Below the header is a navigation bar with tabs: Profile, Appointments, Client Log, Email Log, Forms, Products, Courses, Agreement, Invoices, and To Do List. The main content area is titled 'Group information' and contains a list of consent checkboxes and groups. The first checkbox is checked and has a date stamp '(Subscribed on 05/18/2018)'. Below it are several other groups, some with checked checkboxes and date stamps, and some with unchecked checkboxes. The groups listed are: 'Click here if you would also like to receive other incredible free resources (such as tips, documents, checklist, roadmaps, video trainings and more). (Subscribed on 05/18/2018)', 'Click here if you would like to also receive awesome, exclusive offers to support you in your quest (such as programs not available to the public, discounted offers, and more)', 'Courage, Risks & Rewards Lead Magnet_optin_group (Subscribed on 05/18/2018)', 'Default Optin Sidebar_optin_group (Subscribed on 05/18/2018)', 'My Group', 'My Signature Coaching', 'My Target Market', 'My Teleclass', and 'Yes, I also wish to receive business building tips, free resources and exclusive offers. (Subscribed on 05/18/2018)'.

Lawful Processing:
Date stamp gives
evidence of consent.

**Unable to manually
add to this consent
groups.**

Templates & Resources



TEMPLATES FOR YOU

Privacy Policy

PRIVACY POLICY

Effective 25nd May 2018 **{{EDIT EFFECTIVE DATE}}**

INTRODUCTION

This privacy notice provides you with details of how we collect and process your personal data through your use of [URL OF YOUR SITE: eg: coachname.coachesconsole.com or coachname.com or BOTH}}](#)

GDPR Section Added
To Client Agreement
Template



DATA PRIVACY POLICY

By accepting this Agreement you acknowledge you have reviewed and accepted the terms provided in our Privacy Policy as well. Click here to open a separate window to read the Privacy Policy which includes important information such as:

- * the data we collect
- * how we use, store it, transfer and protect it
- * how your data might be shared
- * how long the data will be retained for
- * your legal data protection rights

TEMPLATES FOR YOU

DOUBLE OPT-IN CONFIRMATION THANK YOU PAGE:

As Promised...



...your copy of the download is waiting for you in your inbox!

You can also click here to download your free copy of **{INSERT NAME & HYPERLINK TO LEAD MAGNET}** right away, why wait!

Get started NOW!

When you dive into this, be sure to check out the tip on **{INSERT PAGE NUMBER WITH HOT TIP}**.

This is where so many clients just like yourself tend

I think you'll enjoy this tip!

I recently sent the folks on my list another great resource **{ANOTHER LEAD MAGNET OR RESOURCE}**

PRIVACY POLICY UPDATE EMAIL TEMPLATE – TO SEND TO ENTIRE LIST

Subject Line: We've updated our Privacy Policy with YOU in mind

Message:

Hello \$FIRSTNAME\$,

I care about your privacy and want you to trust that your information is respected part of our community. That is why I am updating my Privacy Policy **{HYPERLINK TO PHRASE TO THE PRIVACY POLICY PAGE ON YOUR CONSOLE WEBSITE}** effective on 2018.

The updates are designed to provide greater transparency and clarity around how we use your information. The new version also includes **some important updates that are for my business to comply with the new European General Data Protection Regulation and other international laws** which are better protecting the privacy rights of individuals

RE-ENGAGEMENT CAMPAIGN TEMPLATE – SEND TO CONTACTS TO GET RE-CONSENT

NOTE: prior to sending the re-engagement campaign, spend 2-3 weeks of time to your list to provide good content, hot tips, great resources and tons of awesome things so juicy that people will not want to stop receiving your awesomeness

Once you've sent those emails to build goodwill among your list and engaged them, then send the three emails below. Customize the templates below before you

RE-ENGAGEMENT EMAIL #1

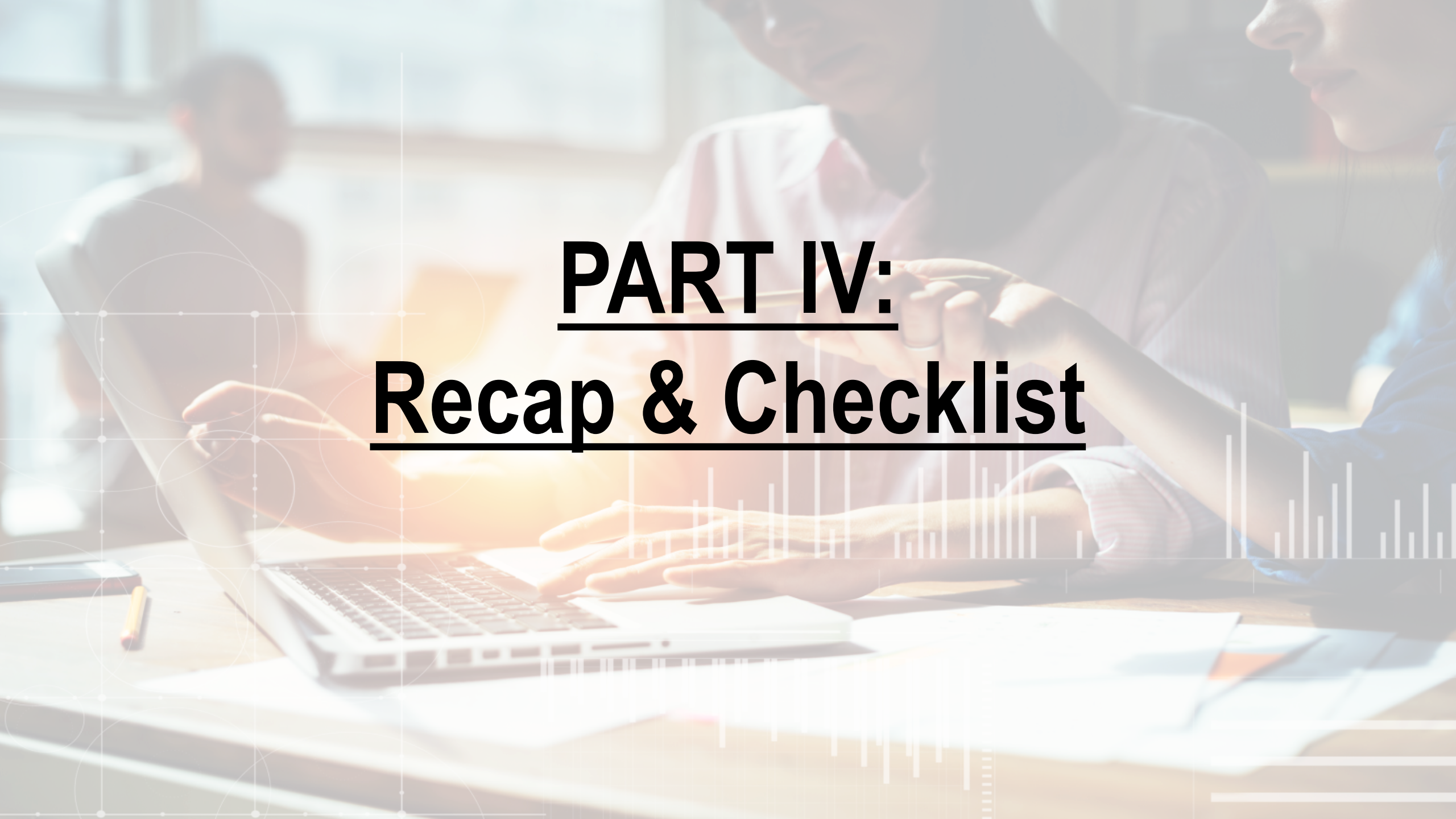
Directions: Review the below email template, customize as you wish and where you see yellow highlighted text, insert the appropriate text based on the instructions. This email is ready to send to the necessary contacts.

Purpose: To request consent (again) from existing contacts that are located in a physical location is unknown to you.

Send To: Two Groups: "EU Contacts" and "Unknown Location Contacts"

Subject Line: More great resources with YOU in mind... hopefully???

Message:



PART IV:
Recap & Checklist

Resources

<https://coachesconsole.com/GDPR>

- ✓ The full GDPR regulation (88 pages)
- ✓ TCC Updated Privacy Policy & EULA
- ✓ TCC Readiness Checklist
- ✓ Personal Data Inventory Spreadsheet

Templates

<https://coachesconsole.com/GDPR>

- ✓ Privacy Policy Template
- ✓ Client Agreement Template
- ✓ Re-Engagement Campaign (re-consent message)
- ✓ Double Opt In Confirmation Message

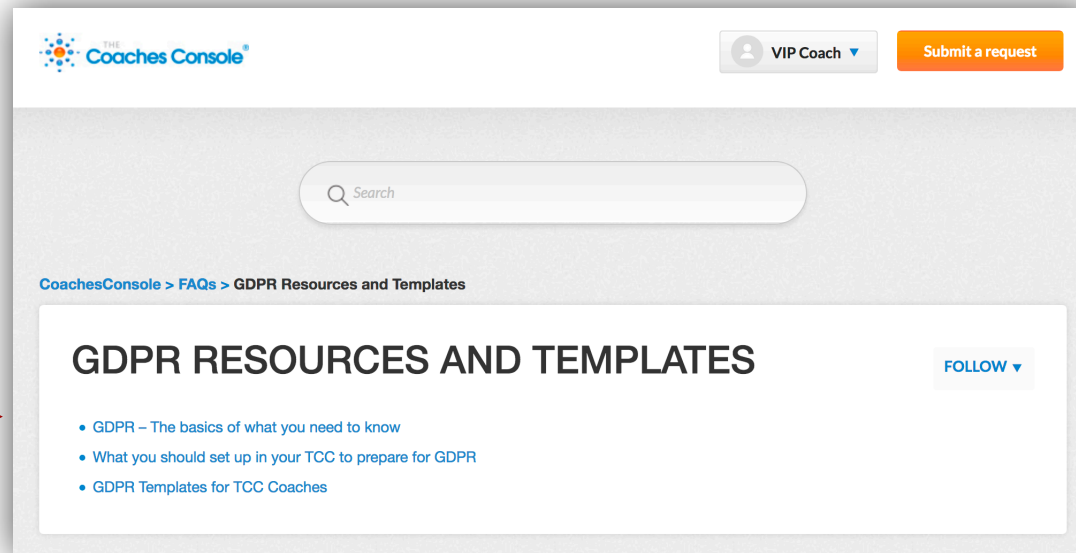
GDPR & Your Business: A Recap

- ❑ Review the Privacy Policy template, finalize and publish on your website
- ❑ Send "Privacy Policy Updated" Email to list to notify of addition/change
- ❑ Review the Client Agreement template, finalize and update in TCC
- ❑ Add the Consent Checkbox(es) to your lead magnet opt in forms
- ❑ Click to accept changes to TCC Privacy Policy and EULA
- ❑ Create 4-6 pieces of high value content to Build Goodwill with your list
- ❑ Organize contacts into two Groups (EU and non-EU)
- ❑ Review & customize re-engagement campaign and send to EU and unknowns Group
- ❑ After 3 months remove those contacts not re-consenting



GDPR & Your Business: A Recap

<https://coachesconsole.com/GDPR>



The Coaches Console logo is in the top left. In the top right, there is a user profile icon labeled "VIP Coach" and a "Submit a request" button. A search bar with the placeholder "Search" is centered below the navigation. The breadcrumb trail reads "CoachesConsole > FAQs > GDPR Resources and Templates". The main heading is "GDPR RESOURCES AND TEMPLATES" with a "FOLLOW" button to its right. Below the heading is a list of three items:

- [GDPR – The basics of what you need to know](#)
- [What you should set up in your TCC to prepare for GDPR](#)
- [GDPR Templates for TCC Coaches](#)

How To Use This Readiness Guide

We get that the GDPR is complex stuff. We've been preparing in an effort to make it an easier process for you as a Coaches Console user, adding features (some available now and some being released in the near future) along with templates to help you streamline your GDPR compliance as much as possible as it relates to using your Coaches Console System.

This guide is NOT the entirety of the GDPR articles or regulations. It's meant to make it easier to be GDPR-compliant as it relates to The Coaches Console System.

Our attorney says we have to now share the disclaimer, and it's a big one :-)

Disclaimer

All information presented on this page is not legal advice.

While any templates provided were created with the specific needs of a Coach using TCC, you still need to customize them considering the way you run your business.

These guidelines and recommendations are related to your use of the Coaches Console. It's up to you to consider all the other systems and platforms you might use to store and process personal information.

The GDPR requirements presented here are the ones linked with your use of TCC and only a part of your responsibilities under the law.

GDPR Requirement

Right to be informed

You need to tell your prospects and clients what data you collect, how you safeguard it, how you process it and how long you will keep

What you should do and how TCC helps

Publish a Privacy Policy on all pages of your website(s) where you collect personal information

In Coaches Console, you will find under Website > Pages a new Privacy Policy page that contains a template for you to review and customize (or replace with your

GDPR CVA Readiness Package

Work with a Coaches Console Certified VA to help you get your Coaches Console GDPR Ready. She'll help you with:

- ✓ Reviewing & Customizing your Privacy Policy
- ✓ Publishing your new Privacy Policy webpage
- ✓ Organizing contacts into the 2 "Groups"
- ✓ Customizing Template emails
- ✓ Setting up and scheduling the email templates (privacy policy update, opt in confirmation, re-engagement campaign)
- ✓ Cleaning up your list



<http://coachesconsole.com/certified-vas-marketplace/>

