

GETTING TO “YES!”

Consumer Consent and Preference Management

IAPP 2006 Privacy Summit

Agenda:

Introductions

The Challenges

Examples and Best Practices

Tracking and Integration of Preferences

The Presenters:

Doris Patrick, Director Consulting Services



Jay Cline, Data Privacy Officer



Joshua Baer, Founder & CEO



The Challenge:

Multiple types of privacy choices



Data Sharing (GLBA, FCRA)



Telemarketing (TCPA, TSR)



Wireless Marketing (FCC domain list)



E-Mail Marketing (CAN-SPAM, UT and MI child registries)



Fax Marketing (TSR)



Direct Mail

The Challenge:

How do you get customers to say “Yes!”



Short attention spans



Irrelevant content



Privacy concerns



The more you ask, the fewer will answer

The value proposition -- WHAT’S IN IT FOR ME?

The Challenge:

How do you track and integrate preferences?



Multiple channels



Multiple business units



Multiple databases










Multiple types of campaigns



Multiple vendors and agencies

The Challenge:

Other Considerations:

-  **Company privacy statements may also promise different types of consent**
-  **Consistency across business units and countries**
-  **Creating “express written permission” or EBRs**
-  **Interaction of preferences and regulation**
-  **Continuing to send unsolicited marketing messages – what if they didn’t give consent?**
-  **Validation and “safe harbor”**
-  **DMA membership requirements**

The Challenge:

Determining what choices to offer



What do you want to offer?



How do you ask the question (what, when, how)?



Do you have the programs? (don't offer what you can't deliver)



Do you have the data? How good is it?



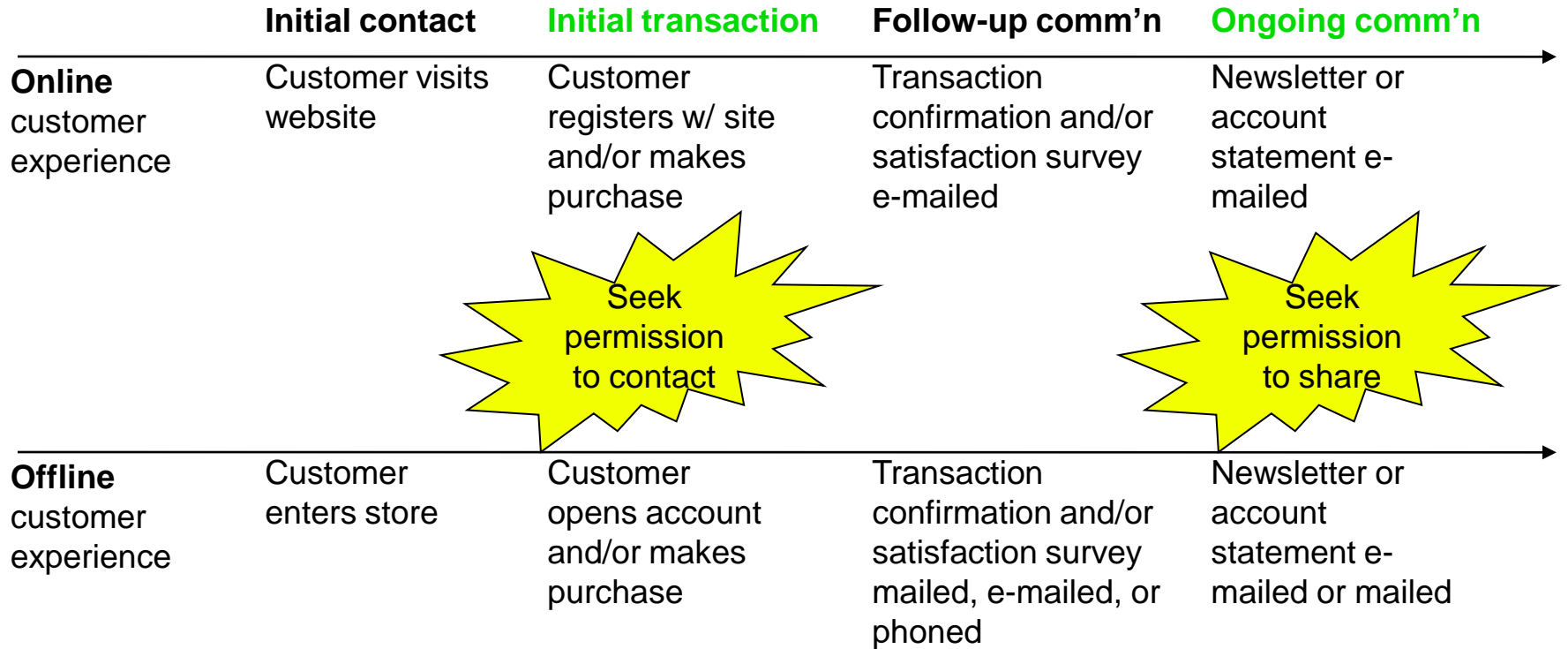
How well can you target?



How do you analyze and use the results?

How do you get customers to say "Yes" ?

Know *when* to ask



How do you seek that permission?

With clarity

- Conspicuous placement of the call to action
- Short statement
- Everyday language

Sharing Your Information Among Other Wells Fargo Companies

Information that helps us identify you or is derived from your transactions and experiences with us may be shared among the Wells Fargo companies, as permitted by law. Wells Fargo uses this information to identify financial services which may benefit you. However, you may instruct us not to share other personal financial information about you with other Wells Fargo companies.

Allow sharing of my information among Wells Fargo Companies?

Yes No

Common words – not legalese



Contact me about Wells Fargo products and services by:


Email Yes No

Mail Yes No

Telephone Yes No

Concise; avoids confusion of opt-in vs opt-out

Communications Preferences



You can select your preferred language and how you would like to receive communications from Hyatt Gold Passport.

Preferred Language:

Email Format: HTML (Include Images) Plain Text [Email format help?](#)

Indicate which of the following you would like to receive from Hyatt Gold Passport. Your personal information is kept confidential subject to our [Privacy Policy](#).

	Yes	No
Exclusive membership news including special offers from Hyatt Gold Passport:		
Receive email	<input checked="" type="radio"/>	<input type="radio"/>
Receive postal mail	<input checked="" type="radio"/>	<input type="radio"/>
Special offers directly from Hyatt Gold Passport's partners:	<input checked="" type="radio"/>	<input type="radio"/>

Terms & Conditions

Please read and agree to the Terms and Conditions prior to becoming a Hyatt Gold Passport member.

I agree with the [Terms and Conditions](#) of the Gold Passport Program.

Similar Yes/No layout

Express Yourself Preferences for J Cline



Select from the following Express Yourself Options

Would you like a copy of your final bill emailed to you?

Yes, email a copy to james.cline@carlson.com

[Legal Disclaimer](#)

Room Location:

High Floor Low Floor

Special Requests:

High Speed Internet (if available, charges may apply)

Near Elevator

My weekday newspaper preference:

Wall Street Journal ▼

Clear, concise choices



Email Options

- I want special offers, program news and account information from Priority Club sent to me via Email

Statement Options

Please indicate how you would like to be notified of any account activity (hotel stays, point redemptions, etc.):

- Quarterly paper statement sent to my preferred mailing address
- Monthly e-statement summary (with offers and news) sent to me via Email

Simple choices

[e-Statement Terms](#)

Member Kit

Please indicate how you would like to receive your member materials. This includes the member guide, membership card and more.

- Make my member guide and card instantly available for download and print.
- Send the member guide and card to my preferred mailing address after my first hotel stay.

Getting to "Yes!"

Consumer Consent and Preference Management

Hotel Preferences



At which Omni Hotel do you stay at most frequently? *

Omni Shoreham Hotel

Preferred Room Type (select all that apply)

- Double Beds
- Corner Room
- King Bed
- Nearby Elevator
- Smoking
- Away From Elevator
- Non-smoking
- Away from Ice Machine
- Quiet Room
- High Floor
- Low Floor

Simple choices to start

Email Preferences

Please send Select Guest® special offers and newsletters

- HTML Version (with images)
- Text Version
- No Email

Family Information

Marital Status: Please select marital status

Spouse Name: _____

Spouse Birthday: MM DD

If you travel with small children, it's important that we provide them the same level of service and attention as we give you. Feel free to provide us with your kids' names and birthdays so that we can make their stay extra special. This information is used for internal guest services only and will not be shared with other companies.

First Name: _____ Last Name: _____ Birthday: MM DD

[Add More](#)

Select Guest® Preferences

- | | |
|---|--|
| <p>Newspaper Preference</p> <ul style="list-style-type: none"> <input type="checkbox"/> Local Newspaper <input type="checkbox"/> USA Today <input type="checkbox"/> Wall Street Journal | <p>Pillow Preference</p> <ul style="list-style-type: none"> <input type="checkbox"/> Feather <input type="checkbox"/> Foam |
| <p>Additional Requests</p> <ul style="list-style-type: none"> <input type="checkbox"/> Extra Blankets <input type="checkbox"/> Extra Pillows <input type="checkbox"/> Extra Towels <input type="checkbox"/> Bed Board | <ul style="list-style-type: none"> <input type="checkbox"/> Extension Cord <input type="checkbox"/> Get Fit Kit <input type="checkbox"/> Modem Hook-up <input type="checkbox"/> Turndown Service |

More choices after joining

If you require a room for the physically challenged, what are your specific needs?

- Hearing Impaired
- Shower Chair
- Accessible
- Wheelchair Accessible
- Bathroom with Transfer Bench
- TDD Phone Machine
- Roll-in Wheelchair Shower
- Strobe Light Phone

Address Preference: Home

Give a Value Proposition

- What will they receive for giving personal information? Better service?


Member Profile Section	Advantages for Completing	Amount Completed
General & Contact Information	We will have your information on file, which will save you time when making reservations.	■ ■ □ □
Your Wyndham Room Preferences	Your room will be customized, from pillow type to extra towels.	■ ■ ■ ■
Credit Card for Express Check-In	Your key will be waiting for you upon your arrival.	□ □ □ □
Airline & Partner Rewards	You will receive 500 frequent flyer miles or reward points each time you stay.	■ ■ ■ ■
Your Interests	We will personalize our member only offers to your interests.	■ ■ ■ □
Complimentary Beverages & Snacks	You will receive the complimentary beverage and snack that you prefer.	■ ■ ■ □



Getting to "Yes!"

Consumer Consent and Preference Management

- **Make it *convenient*** – centralize preference and communication management.

Email Preferences  ^{*} required

* Email address Alternate email address

* Confirm email address Confirm alternate email address

[What's this?](#)

Preferred email format
 HTML (with images) Text

Select all

Marriott Rewards Account Update & eNewsletter
[View sample >>](#)
 Approximate frequency: 1 email per month
 Global promotions, Marriott Rewards account information, program news, member exclusive special offers, and new hotel openings.

Marriott Hotel Specials
[View sample >>](#)
 Approximate frequency: 1 or 2 emails per month
 Destination and hotel offers, special packages, and information on new hotel openings.

eBreaks® Last-Minute Weekend Offers
[View sample >>](#)
 Approximate frequency: 1 email per week
 Last-minute weekend deals that will save you at least 20% on select hotels.

Meeting Planner Offers
[View sample >>](#)
 Approximate frequency: 1 or 2 emails per month

STARWOOD
HOTELS & RESORTS

Email Options

Don't lose any of the emails you've requested from Starwood to your bulk or junk folder - find out how to have them delivered straight to your inbox. [Click here for instructions.](#)

Starwood Preferred Guest E-statements
 Enjoy the convenience of receiving monthly statements by e-mail including members-only offers. Note: As of January 2005, this will be the only statement option for members in the United States and Canada.

Starwood Preferred Guest Exclusive Offers and Promotions
 Be the first to know and take advantage of all that Starwood Preferred Guest has to offer. Plus, enjoy Starwood Vacation Ownership offers and Starwood Preferred Guest marketing partner offers.

Hotel and Resort Features and Specials
 Experience the world of Starwood, from regional and individual hotel specials to great rate and limited time offers.

Guest Stay/Market Research Surveys
 Tell us what you think. Your feedback will help us improve your Starwood experience.

Please do not send me any e-mail.
 Note: You will continue to receive reservation confirmation e-mails. If you prefer not to receive these e-mails, please do not provide your e-mail address when you book.

The New York Times

ON THE WEB

Daily News

Today's Headlines

This e-mail, delivered every morning, brings you the Top Stories, Quotation of The Day and as many sections from the list below as you like. [See sample.](#)

- | | | | |
|------------------------------------|-------------------------------------|---|--|
| <input type="checkbox"/> National | <input type="checkbox"/> Washington | <input type="checkbox"/> Daily featured section | <input type="checkbox"/> International |
| <input type="checkbox"/> Sports | <input type="checkbox"/> Op-Ed | <input type="checkbox"/> Business | <input type="checkbox"/> Arts |
| <input type="checkbox"/> Editorial | <input type="checkbox"/> Technology | <input type="checkbox"/> NY Region | |

DealBook

Edited by Andrew Ross Sorkin, The Times's chief mergers and acquisitions reporter, DealBook provides exclusive interviews, breaking news about M&A, IPOs, Private Equity Transactions and Venture Capital Deals. [See sample.](#)

Newsletters

- | | |
|---|--|
| <input type="checkbox"/> @TIMES — Inside NYTimes.com (Twice monthly)
Updates on new NYTimes.com features, plus the 10 most popular articles and more. See Sample. | <input type="checkbox"/> Circuits (Thursday)
An e-mail-exclusive column by David Pogue, plus the latest technology news and reviews. See sample. |
| <input type="checkbox"/> Your Money (Monday)
Analysis and information for the personal investor, and a look ahead to the week's major business events. See sample. | <input type="checkbox"/> Movies Update (Friday)
A roundup of the latest movie reviews and news, home video releases, video clips and more. See sample. |
| <input type="checkbox"/> Stuart Elliott's In Advertising (Monday)
An e-mail-exclusive review by advertising columnist Stuart Elliott. Also, Elliott's answers to readers' questions, and industry news. See sample. | <input type="checkbox"/> Books Update (Sunday)
Book reviews, news and features from The New York Times Book Review, with expanded coverage from NYTimes.com's Books section. See sample. |
| <input type="checkbox"/> DriveTimes (Tuesday)
A comprehensive source of auto reviews and car industry news from The Times and around the Web. See sample. | <input type="checkbox"/> Travel Dispatch (Sunday)
The best of NYTimes.com's Travel section, including articles, travel guides and readers' reviews. See sample. |
| <input type="checkbox"/> New York Style (Wednesday)
A look at the latest trends in fashion, food and living. See sample. | |

Special Offers and Announcements



E-mail Notifications

Save

Amazon.com E-mail

- | | | |
|-------------------------------------|-------------------|--|
| <input checked="" type="checkbox"/> | Legal notices | The terms and conditions of shopping at Amazon.com (If you choose not to receive legal notices by e-mail, you will need to check our Web site to stay updated on policy changes) |
| <input checked="" type="checkbox"/> | New products | New products similar to those you've purchased in the past (New books by favorite authors, new music by favorite artists, new movies with favorite actors, and so on) |
| <input checked="" type="checkbox"/> | Research surveys | Tell us how well our store meets your needs |
| <input checked="" type="checkbox"/> | Renewal notices | Renewal notices on magazine subscriptions |
| <input checked="" type="checkbox"/> | Shopping partners | New, trusted Amazon.com online shopping partners |
| <input checked="" type="checkbox"/> | Special offers | Notice of sales, new store openings, important new stores features, contests, and other promotional announcements |

Getting to "Yes!"

Consumer Consent and Preference Management

Give assurance

- Where and how do you talk about use limitations and protection?



» Subscriber's choice

You're signed in as:
Joshua Baer
(Sign out)

- » Profile summary
- » Edit profile
- » Change email
- » Change password
- » Forgot password

» Frequently asked questions

- » Business support
- » Enterprise solutions
- » Small & Medium business

Monthly promotions sign-up: create profile

Get valuable HP savings by signing up today to receive special email promotions. Select from customized editions for small and medium business, government agencies, and education.

Register now and tailor your Monthly Promotions email to the HP products you own or manage. Just complete the form below and click 'save'.



Step 1: country/region

*Country/Region

United States

Why do we ask this?

HP subscriptions may vary by your country or region.

Step 2: editions

*Choose your Monthly Promotions email edition:

- small and medium business ([view sample](#))
- education K-12 ([view sample](#))
- higher education ([view sample](#))
- federal government ([view sample](#))
- state and local government ([view sample](#))

Why do we ask this?

HP delivers customized editions of the Monthly promotions e-mail for business, government agencies, and schools.

Step 3: personal information

*First name

*Last name

*E-mail address

Why do we ask this?

Your email address and password allow you to access and update your personal information and subscription preferences. When defining a password please choose one with 6-32 characters. You can use

Checklist of best practices

- Get permission to contact, then share
- Clear, simple choices in everyday language
 - Avoid double negatives!
- Incentivize granting permission
 - Sweepstakes
 - Premier member clubs
 - Free services
- K.I.S.S.
 - Measured in
 - # of clicks to unsubscribe
 - # of questions to fill out
 - # of pages to fill out
- Make privacy policy and disclosures prominent

Channels are typically silo'd

- Postal
- Telephone
- Email
- Fax
- Wireless (SMS)
- Acquisition Marketing
- Acquisition Sales
- Customer Marketing
- Customer Upsell
- Transactional Receipt
- Service Notification

What about business units?

Why provide a central customer view?

- Improve customer experience
- Reduce compliance risk
- Improve customer service efficiency
- Acquire more permission

How to provide a central customer view?

- Centralize all services with a single vendor
 - + Save time and resources
 - + Reduce risk
 - + Possibly save cost
 - - Limit choices, unlikely to have best of breed for all
 - - Possibly limited customization
- Integrate with each vendor
 - + Maintain control
 - + More customization options
 - - Can be extremely expensive
 - - Requires vendor support

Third Party Implementation Services

- Consulting
- Hosted solutions
- Software solutions
- Custom Software
- Address verification
- Human verification (Turing)

Managing Preferences Across Channels

