IEEE Technical Activities Bulletin # 3
Topic: Consent Permission Marketing
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IEEE Data Privacy Permission Marketing Approach

A fundamental element of the General Data Protection Regulation (GDPR) and other data privacy regulations is ensuring that the sender of a communication has a valid reason to be contacting the recipient prior to sending the communication. While there are several reasons a communication may be permissible, one of the most important is obtaining consent from individuals prior to contacting them. Once consent is obtained, it is important to respect and follow that decision and any preferences the individual may inform you about.

Determining Which Individuals You Can Communicate With

IEEE primarily obtains consent from intended recipients of communications through agreement to the IEEE Privacy Policy. In addition, individuals may subscribe to IEEE communities' (IEEE Society/Technical Council/Technical Community) activities and benefits as a way to remain informed.

Consent to the IEEE Privacy Policy can be captured in a number of different ways:

1. IEEE membership - During purchase or renewal
2. IEEE Account - As part of the creation or use of an IEEE Account
3. Event Registration - During the registration process for an IEEE event (conference, meeting, seminar, webinar, etc.)
4. A Purchase transaction such as publication

Subscription to an IEEE Community (IEEE Society/Technical Council/Technical Community) can occur in several ways and points of contact:
1. During a visit to an IEEE website
2. While registering for an IEEE event
3. By responding to an offer within an IEEE email campaign
4. Visiting an IEEE exhibit or booth at an event (conference, meeting, tradeshow, etc.)

Capturing Consent or Subscription - IEEE will soon be introducing a tool to enable the capture of consent or subscription that updates the IEEE Consent Management System. (***See** Bulletin #10: Consent Capture and Recording in the IEEE Consent Management System*)

Consent to the IEEE Privacy Policy and an individual's subscriptions to various IEEE Society / Technical Council / Technical Community communications are reflected in the individual's profile in the IEEE Privacy Portal.

IEEE Privacy Portal - *an example*

An individual may choose to choose to unsubscribe to individual communications or opt-out of any of the subscriptions that they may have previously accepted at any time. As a result, it is critical that IEEE communications track the most up-to-date information in the IEEE Privacy Portal.

Relationship-Based Communications

Messages to an individual based on their relationship or engagement with IEEE may be permissible. The communication message topics must be related to their specific relationship and/or engagement with IEEE (i.e., product purchase, conference attendance, authorship, served as a reviewer, participant in Council or Technical Community, registered for a course, registered for a webinar, signed up for a newsletter, etc.)

Do not contact these individuals for marketing purposes or other solicitations on any other topics.

Two key factors to consider at the beginning of any relationship-based outreach are:

1. What message are you communicating?

2. What is the relationship of that individual to the group you are representing?

Retain a historical record of how and when the relationship or engagement occurred (such as purchase or registration details). This data should be stored in an IEEE database or application or downloaded to a volunteer's GoogleApps@ieee account.

➔ When possible, collection and storage of subscription-level information in the IEEE Consent Management System (CMS) is recommended. *(See Bulletin #10: Consent Capture and Recording in the IEEE Consent Management System)*

Third-party campaign management systems (e.g., email service providers, marketing automation software, etc.) may also enable collection of consent to the IEEE Privacy Policy and other subscriptions

➔ This approach will require additional steps to upload this information to CMS for future required validation needs.
➔ Contact your campaign management system provider for specific guidance on collecting consent or assistance with record keeping.
➔ If not uploaded to the CMS, this data should be stored in an IEEE database or application or downloaded to a volunteer's GoogleApps@ieee account.

The table below provides examples showing message and relationship alignment.

Relationship Basis	Message Topic	Timeframe	Examples
IEEE Membership	IEEE member benefits	Current IEEE members	Technical expertise, activities and events, career and professional networking, discounts
IEEE Society or Council membership or joined a Technical Community	Member benefits of that Society / Council / Technical Community	Current members of that Society / Council / Technical Community	Call for authors for Society/TC publications, reviewers or speakers for Society/TC conferences, newsletter for Society/TC members

Invitation/ Registration for a conference, course or webinar sent to past attendees	Next conference, course, or webinar in the same series	Up to 36 months after the most recent registration	Call for papers, registration announcements sent to 2019 ABC Conference sent to 2017 and 2018 attendees of ABC Conference
Subscription to a community, newsletter or whitepaper	Ongoing community communications, newsletter or whitepaper	Until they unsubscribe or do not resubscribe	Latest edition of IEEE Talks Big Data, a series of Q&A articles with IEEE experts on big data

Required: Do Not Contact – While the above guidelines apply in most cases, some individuals have informed IEEE not to contact them again. These individuals should not receive any additional email communication, except as is required legally or to fulfill a service they have purchased (e.g. sending a receipt).

As long as an individual has their Do Not Contact (DNC) status active (checked-box in the IEEE Privacy Portal, they are not to be contacted unless they change their DNC status to allow communication.

Volunteers using external/local lists MUST perform list validation *(See Bulletin 11: Consent Validation of Mailing Lists*) which will suppress any individuals who have requested Do Not Contact status.

An individual selecting "Do Not Contact" in the IEEE Privacy Portal overrides <u>any</u> previously provided consent as a basis for communication.

As always, reasonable restraint and common-sense email marketing practices should be applied to the frequency of contact. For additional information please see the IEEE Outreach Guidelines.

If you have questions or need assistance, please contact TA Answer Central.

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