Consent & Preference Management (CPM)

Point of View
August 2022
CPM overview
An introduction to consent

Consent is evolving. It’s transitioning from a regulatory “check the box” exercise to a major driver of business enablement... and it’s increasing the need for digital governance, changes to the digital marketing world, and better management of fundamental privacy obligations.

What is consent?

- Consent is an indication of an individual’s wishes
- by a statement or an action
- to signify agreement or disagreement to the processing of personal information (PI) relating to them

Types of consent

- **Explicit** - individual is clearly presented with an option to agree or disagree to the processing of their data
- **Implicit** - granted by an individual’s action (or inaction) and situational circumstances

Key attributes of valid consent...

- **Freely given** - without any conditions or resulting detriment to an individual
- **Specific** - clearly distinguishable from other types of consents
- **Informed** – clarity on how data will be used before obtaining consent
- **Unambiguous** – obvious and clear affirmative consenting action needed
- **Easy to withdraw** - as easy to withdraw consent as it was to give consent
An introduction to preferences

As consent evolves, so do expectations regarding personal data and how it will be used. Providing individuals with additional preference and choice options increases communication effectiveness and improves the overall user experience.

Preference management is the process that allows individuals to customize how an organization uses their personal data, including related to communication preferences.

Contact Channel
Allow individuals to select their desired channel for receiving communications

Payment Method
Offer multiple payment options to an individual so their preferred method may be selected

Interests
Empower individuals to only receive communications related to their selected interests

Communication Preferences
Provide granular options for communications such as frequency, format, and language

Option to Unsubscribe
Deliver a clear method for individuals to opt-out of communications and update preference selections

We know value comes from honoring an individual’s preferences...
## Business drivers leading to consent and preference management program establishment

As business increase cross-platform data collection and use, teams often see increased consent management complexities.

### Organizations want to...

- Provide unified consent experiences across channels and brands
- Leverage collected data to better market to users and monetize insights
- Comply with regulations and user expectations of privacy
- Start, stop, or continue data processing at the direction of their users

### ...but can’t because they lack...

- Coordination of consent management across products or brands.
- A first party data strategy and data governance components of consent.
- A decision-making framework to navigate an evolving regulatory landscape trending toward increased privacy and consent obligations.
- A consent central repository.

### ...which commonly results in:

- Impaired user journeys
  - Negative and non-differentiated experience
- Hampered data potential
  - Lack of insights based on consent choices
  - Limited market insights
  - Inability to perform segmentation, research and development, and introduce new products and services
- Regulatory risk
  - Increased potential of non-compliance including fines, loss of trust, and brand reputational challenges
- Siloed consent management, often by brand, team, or channel
  - Inadequate transparency, choice, and control when managing consent and preferences
  - Inefficient governance and enforcement of consent decisions
Benefits of a broad CPM program

Forward-thinking organizations are leveraging CPM as a brand differentiator, and integrating it into organizational priorities, in turn increasing return on privacy investments

Driving data sharing through trust
The more trusted the brand, the more willing customers will be to share their data. Organizations with untrustworthy reputations will find it difficult to collect certain types of data, regardless of the value offered in exchange.

Shifting control to individuals
Central to many customers’ privacy concerns is the loss of control. Individuals may be willing to share data in one context, but still worry about their inability to dictate who else might have access and how else it may be used in the future.

Justifying data collection and data use
Consent requires transparency; by explaining the types of data collected and the purposes of collection, individuals are given visibility behind the scenes. When organizations provide the ‘what’ and ‘why’, individuals have the information they need to make informed decisions.

Enhancing user experience
Organizations are increasingly focused on personalizing user experiences. It is important that organizations understand customers’ interest and communication preferences to maintain a positive, customized, experience.

Alignment with privacy regulations
Organizations can improve user trust while reducing the risk of regulatory non-compliance related to undisclosed data use by providing clarity about how information will be used, gathering consent where required, and managing consents and preferences effectively.

62% of North Americans are concerned about the safety of their personal data \(^1\)

61% of consumers feel like they’ve lost control over how their personal information is used – up from 26% in 2019 \(^2\)

Only 27% of consumers completely understand how companies use their personal information, and 86% want more transparency \(^2\)

66% of customers expect companies to understand their unique needs and expectations, yet 66% say they’re generally treated like numbers \(^2\)

71% of countries already have data protection and privacy laws and 9% of countries have draft legislation \(^3\)

\(^1\) \(^2\) See Appendix for sources

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The complexities of building and maturing a CPM program
CPM programs depend on complex synergies across the data lifecycle

Harmonious management of consent and preference data from the point of capture onwards enables unified and tailored brand experiences while maintaining a privacy-first approach...

...but if objectives are misaligned across people, processes, and technology, consent and preference management remains onerous and complex. It is critical for organizations to understand the potential factors which may increase complexity when establishing their CPM program.
The cross-functional footprint of CPM programs creates further challenges. Numerous and sometimes competing stakeholder groups each bring their own primary objectives to a CPM program.

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<th>Privacy / Legal</th>
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<td>Capture appropriate consent across geographies, confirm consent language is clear, transparent, and aligned to legal requirements</td>
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<td>CPM Objective: Confirm CPM program satisfies privacy and legal requirements across in-scope markets</td>
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<th>Engineering / IT / Operations</th>
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<td>Define and/or execute a business-as-usual operations model for the CPM ecosystem to operate as expected</td>
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<td>CPM Objective: Infrastructure and technologies are operating as expected and performance is meeting business demand</td>
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<th>Finance</th>
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<td>Drive top line revenue growth, ownership of budgets, fiscal year planning and strategy around Return on Investment (ROI)</td>
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<td>CPM Objective: Understand overall costs of CPM program and ROI</td>
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<th>Contact Centers / Customer Support</th>
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<td>Enable effective and positive experience for users while utilizing different data points to validate users to prevent fraudulent behavior</td>
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<td>CPM Objective: Provide support to users through the channels they prefer; help the user change their consent and preferences when desired</td>
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<th>Marketing / Digital</th>
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<td>Enables the ability for a clear view of the user, a trusted human experience, personalized marketing, enable intuitive digital experiences across channels</td>
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<td>CPM Objective: Leverage user consent and preferences to market personalized content and grow revenue</td>
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<td>Appropriate security controls are in place to protect user data while limiting introducing unnecessary friction related to the user experience</td>
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<td>CPM Objective: CPM platforms and data transfers have appropriate controls and safeguards</td>
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<th>Fraud / Security Operations Center (SOC)</th>
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<td>Identify risks, threats, and mitigate activities impacting users such as account take over and fraudulent activities</td>
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<td>CPM Objective: Maintain security of user accounts and data; communicate security alerts</td>
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<th>Organizational Change Management</th>
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<td>Enable end users’ experiences across digital channels with training and communications tied to new or updated services</td>
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<td>CPM Objective: Demonstrate to users how to use available digital channels; enable support to help users</td>
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**Stakeholders in Consent and Preference Management Programs**
CPM platform integration with other tools introduces yet another layer of complexity

A central consent and preference repository allows a business to collate and push consent to and from upstream and downstream systems; but establishing this end-to-end architecture involves strategic planning and cross-functional execution.
We understand CPM challenges and can bring our lessons learned to your program

We have served numerous global organizations looking to develop and improve their CPM programs. We have supported complex implementations that span geographies, brands, channels and user journeys.

Our team brings our tested experience, industry knowledge, CPM lessons learned, and project accelerators to every CPM engagement.

Lessons learned based on our first-hand experience

**Identified business drivers**
Clear drivers are important in establishing a prioritized implementation plan. If there is no defined business drivers, uncertainty and lack of direction can arise.

**Alignment among stakeholders**
Developing an operating model prior to implementation of a CPM solution is critical; it impacts both the project and the transition to business as usual. Sustain the model and obtain regular alignment on key decisions to help meet project objectives.

**Willingness for change**
Implementing a CPM solution may require changes to business and technology processes. Conforming to current processes can result in workarounds and additional maintenance challenges.

**Establishing baseline configurations**
Creating baseline configurations provides consistency and scalability across markets, brands, and experiences. As the scope expands, updated business and regulatory rules may require customization against the baseline.

**Importance of a single identifier**
Establishing a universally unique identifier across systems is vital for enabling a single view of known and unknown individuals. CPM and CIAM solutions can interact to improve the overall user journey.

**Transparent consent experience**
Business logic and requirements need to be designed to produce the desired experience for individuals. Accounting for the language, messaging, and purpose from multiple perspectives is necessary for creating an impactful consent journey.
Start the journey of building a mature CPM program

Our approach can help you establish and grow a CPM program that is “right-sized” to your organization, considering your marketing/branding challenges, your size, and your risk tolerance.

- Centralized consent data within a CPM solution from multiple sources of capture
- Collect and manage consent data in a compliant manner with the ability to maintain a robust audit trail
- Enabled digital interface for individuals to manage their consent and preferences
- Established consent intake processes through the coordination of stakeholders
- Interconnected program inclusive of a customer identity and access management (CIAM) solution to uniquely identify known and unknown individuals
- Omnichannel experience is offered to individuals for managing consent and preferences
- Increased user touchpoints and engagement enabled by expanded consent and preference options (e.g., channel, brands/products, content type)
- Ability to analyze consent and preference data to perform segmentation, drive marketing campaigns, inform opportunities to cross-sell products and services, and contribute to research and development efforts
- Automation of consent and preference processes deployed (e.g., reconsent is needed if authorization expired)

Considerations for seeking your target maturity level

We consider several factors while helping our clients determine the type of CPM program to meet their needs, recognizing that every client environment and maturity target will be unique.

01 Organization size and resources
Consider the size of your organization, including revenue, employee size, and resources available to operate a CPM program

02 Legal and regulatory complexity
Consider jurisdictions and geographies in which your organization operates, as well as sectoral regulations that may apply, such as HIPAA* and GLBA*

03 Current consent collection process
Consider the current volume of consents collected, the current methods of collecting these consents, and challenges associated with existing processes

04 Technologies leveraged in CPM process
Consider technologies used in existing CPM processes, including privacy software, marketing automation platforms, CIAM, and others

*HIPAA – Health Insurance Portability and Accountability Act    GLBA – Gramm-Leach-Bliley Act
Our approach
How we approach this journey

We help our clients implement CPM by leveraging our differentiated approach.

**We leverage our tried-and-true CPM accelerators...**
...to expedite CPM program implementations by enabling critical components customized specifically for your organization. These artifacts such as implementation plans, governance frameworks, and requirement libraries can be the backbone for a successful program build and deployment.

**We view CPM broadly...**
...to help enable a real-time data insights to achieve identity-driven CPM, correlated omni-channel experience, and personalized standards/policy enforcement.

**We recognize consent as a cross-functional organizational challenge...**
...to help develop an integrated governance and operating model built on industry leading practices that address cross-functional domains, thereby avoiding addressing consent management requirements in siloed workstreams.

**We help streamline the user journey across your business functions...**
...to design and implement a centralized system of record for managing and tracking the collection, processing, and storage of consent and preference data within your organization.
Our high-level approach to implementing CPM

We leverage a four-step approach to build, implement, and operate a CPM program within your organization.

**Discover**
Assess the current state environment, including consent and preference use cases, as well as existing technical solutions and capabilities for CPM.

**Design**
Design the program governance and operating model, end-to-end future state architecture, and data models that are critical to a scalable program roll-out.

**Implement**
Implement a CPM program governance and operating model. Configure, test, deploy, and monitor the implementation of a CPM solution leveraging an agile release plan.

**Operate**
Assist with ongoing monitoring and operational support/managed services to expand consent solution to additional business units, brands, and countries.

This phased approach involves activities that span across People, Process and Technology aspects of CPM.

**People**
Establishing an operating model or an overall governance structure by identifying individuals and their respective roles and responsibilities for CPM in the organization.

**Process**
Developing and implementing policies and procedures, which serve as guidance for consent management systems across the enterprise.

**Technology**
Technology enablement of CPM solutions in the organization by deploying tools and technologies.
Example timeline for initial CPM program build and implementation

Estimated timelines for activities and resulting milestones for an initial implementation (through discovery and one release cycle*) are shown below.

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*Release cycle is defined as the development and deployment of a system integration with a CPM solution

**Phase durations are estimates and subject to change based on organization size, project/release scope, and stakeholder availability; this timeline depicts one release cycle.
CPM discovery phase

Discovery activities and outcomes related to requirements gathering, current state assessment, and implementation plan are detailed below.

Main Activities

- Host a project kickoff and facilitate discovery workshops with privacy, technology, marketing, and legal stakeholders to understand user journeys, use cases and requirements
- Develop and socialize use cases and requirements with the project team to prioritize and document business, functional and technical requirements along with supporting use cases in a centralized repository
- Gather and review existing policies, standards, and procedures governing the current state CPM program to provide enhancement recommendations
- Review existing templates for privacy notices, consent collection, preference centers and consent emails for migration into future state implementation
- Develop a current state inventory to record the various collection points, consent purposes, custom preferences, data elements and consent interaction types associated with each collection point
- Create an implementation plan to facilitate the execution of the design and implementation process with defined scope, timelines and stakeholder responsibilities (plan is dependent on vendor selection)

Additional Activities: Vendor Assessment

- Understand current viable vendor landscape by conducting workshops with stakeholders to prioritize technical requirements for selection
- Perform vendor assessment and review of existing products that can satisfy consent and preference requirements and determine whether to build or buy a consent and preference solution
- Develop recommendation based on the vendor assessment and facilitate contracting and procurement of a vendor, as appropriate

Sample Accelerators

- Requirements and Use Case Library
- CPM Collection Point Inventory
- Implementation Plan

Key Outcomes (O) and Deliverables (D)

- Project kickoff presentation and discovery workshops (O)
- Prioritized requirements and use case library (D)
- CPM collection point inventory (O)
- Project implementation and staffing plan (D)
- Vendor assessment and recommendation report, as applicable (D)

*Phase durations are estimates based on experience and are subject to change based on organization size, project scope, and stakeholder availability.
CPM design phase

Design activities and outcomes related to governance, architecture, and policies are detailed below.

Main Activities

- Document current state user journey for each in-scope persona to understand how information is collected, processed, and stored.
- Design a future state consent and preference journey flow that enables a seamless user experience for managing consent and preferences across business lines and products, and methods for exercising preferences and withdrawing consents.
- Design a CPM program governance and operating model to establish clear roles and responsibilities for program build and implementation.
- Define data processing policies based on organizational standards related to CPM.
- Refine the future-state architecture and integration points for the CPM solution within the broader client architecture based on technical requirements gathered and stakeholder conversations.
- Socialize the future state diagram with stakeholders and refine based on feedback.
- Design transitional architecture diagrams for a phase-wise approach**.
- Develop the data model (purposes, preferences, data elements) for managing and storing consent and preference data within CPM solution.
- Develop technical design document describing global solution architecture, integrations, and module designs/workflows.

**Note: Refinement of transitional state diagrams may continue throughout the design phase to accommodate any changes or lessons learned in an agile approach.

Sample Accelerators

- CPM Journey Flow
- Governance Framework
- Architecture

Key Outcomes (O) and Deliverables (D)

- Consent and preference journey flow (D)
- Governance and operating model (D)
- Transitional/future state architecture diagrams (D)
- Data model (O)
- Technical design document (O)

*Phase durations are estimates based on experience and are subject to change based on organization size, project scope, and stakeholder availability.
CPM implementation phase

Implementation activities and outcomes related to system configuration, testing, and deployment are detailed below.

**Main Activities**

- Host implementation kick-off session to review scope, agile release plan, and operational responsibilities
- Configuration of the data model within CPM technology (purposes, preferences, data elements, collection points)
- Review business requirements and technical architecture design with systems owners to align on integration expectations and outcomes
- Develop system integration testing (SIT) and user acceptance testing (UAT) scripts tied back to business requirements with clearly documented expected outcomes
- Integrate CPM technology with in-scope systems to establish a centralized repository for tracking the collection, use, and sharing of consent and preference data
- Conduct, facilitate, and document the results of SIT for in-scope integrations
- Facilitate and document the results of UAT for in-scope integrations
- Review SIT and UAT results with relevant stakeholders to document go/no-go decision for deployment and go-live
- Migrate data model and workflows from UAT environment to production (PROD) environment
- Deploy and activate all the configurations/workflows in the PROD environment
- Perform hyper-care monitoring of deployed integrations to identify issues and assign resolution activities to respective stakeholders
- Develop knowledge transfer materials for transition to business-as-usual (BAU) operations
- Conduct knowledge transfer session(s) as deemed necessary by operational support model

**Sample Accelerators**

- Implementation Kick-Off
- SIT and UAT Scripts
- Hyper-care tracking template

**Key Outcomes (O) and Deliverables (D)**

- Implementation kickoff presentation (O)
- SIT and UAT test scripts (D)
- SIT and UAT test results (D)
- Hyper-care tracking document (O)
- Knowledge transfer (KT) deck (D)

*Implementation duration is an estimate for one release and is subject to change based on release scope, organization release sprints, and stakeholder availability.*
CPM operate phase
Operational activities following deployment and related to program sustainability, reporting, and monitoring are detailed below.

Main Activities

- Provide additional knowledge transfer services for operationalization, as applicable
- Monitor workflow logs and extract metrics on workflow activities such as:
  - Number of obtained consents and opt-outs (e.g., by channel, persona type, product, brand)
  - Number of new consent and preference profiles
  - Preferences selections by individuals (e.g., communication preferences, topics, purposes)
- Provide regular status updates and risk, action, issue, and decision (RAID) log to privacy / business stakeholders on metrics / consent and preference profile activities
- Monitor workflows and other functionalities within the CPM tool, including:
  - Transfer of consent and preference updates to downstream systems
  - Creation of consent profiles / accounts across downstream systems
  - Timely updates across systems (e.g., near real time)
- As applicable, resolve configuration issues within the CPM solution
- Assist with testing and deployment of additional configurations to address issues, as applicable
- Escalate risks, issues, and required decisions to applicable stakeholders
- Support ongoing managed operate activities for the CPM program (see next slide)

Sample Accelerators

- Metrics and reporting
- RAID log

Key Outcomes (O) and Deliverables (D)

- Knowledge transfer sessions for additional functions / areas (O)
- CPM metric reports (O)
- RAID log (O)
- CPM tool configuration issue log (O)
Operationalizing CPM through managed services

Our managed services provide skilled resources dedicated to monitoring the CPM solution and expand the CPM program to new brands, channels and geographies.

Our CPM managed services support:

Continuous Monitoring
- Monitor and fix any integration defects that may arise
- Obtain feedback from business stakeholders on improvement areas
- Weekly reporting to business stakeholders

CPM program expansion

Analysis
- Work with business stakeholders to identify new use cases or enhancements to existing use cases of CPM solution implementation

Design
- Update architecture and data flows for new/enhanced use cases
- Update technical design documents

Implement
- Configure new use cases
- Complete SIT and UAT Testing
- Deploy the new use cases on the CPM solution

Advantages of a managed services program

Skilled resources
Dedicated resources who are skilled and ready to enhance or expand your CPM solution implementation

Cost reduction
Cost of recruiting and training dedicated resources for CPM would be considerably higher than adopting the managed service model

Reduced burden on existing resources
This model allows organization resources to focus on higher value-add activities instead of day-to-day CPM operational activities

Scalability
Supports organizations’ changing requirements with additional resources
We’re ready when you are

CPM managed services by Deloitte is an established, mature service offering that can be deployed on a one-off, on demand or ongoing basis.

We will design a tailored, defensible, repeatable managed service solution, subject to continuous improvement and refinement over time. Our solution is designed to offer the following features and benefits:

- **Scalable**
  The service can be scaled up or down depending on requirements and can easily meet the changing demands caused by regulations.

- **Repeatable**
  The service is defensible, auditable and repeatable and therefore can be easily leveraged within your organization.

- **Clear costs**
  Costs are clearly defined and easy to calculate for each request and anticipated cost savings with maturity of process.

- **Cross company benefits**
  There will be wider improvement of your ability to respond to litigation or regulatory data requests.

- **Clear Review Process**
  There will be clearer channels for process/service improvement. Your team can oversee and contribute to this process.

- **Time, resource and cost efficiencies**
  Allows more focus of time and current resources on value add and specialized knowledge role.
  Use of technology to automate as far as possible to provide efficiency benefits.

- **Standard process**
  Development of a standard process with a clearly defined structure which will be used on each request.

- **Clarity of ownership**
  There is clear ownership over the process and escalation points. Through strengthened communication channels the pressure points are better supported.

Deloitte’s Managed Service helps organizations realize measurable benefits team in an increasingly unpredictable data request environment.

Deloitte’s Managed Service can be set-up in response to a one-off event (e.g., BAU ongoing service)

Deloitte can provide CPM services in multiple jurisdictions deploying a variety of approaches to meet your requirements, including:
Getting started with CPM
How to get started?

To get started with your CPM strategy, consider the following points; we can help you define and implement your strategy and a path forward.

1. Have you developed an inventory of privacy notices and existing consent collection points?

2. Have you developed consent and preference journey flow maps from a user perspective?

3. Have you identified technical, business, and functional requirements to get you to your target state for CPM?

4. Have you assessed your need for a CPM solution? If so, have you initiated a vendor assessment (or a build-versus-buy assessment) process?

5. Across business units and communication channels, is there a mechanism to allow individuals to withdraw consent? Are individuals informed about their right to withdraw consent?

6. Do you have a mechanism for tracking consent and withdrawals with an audit trail that can demonstrate compliance to regulatory authorities?

If no, plan to conduct a **discovery** phase

If no, plan to conduct a **design** phase
Why Deloitte?
Our differentiators include our experience, our team, and our methodology, as outlined below.

**Experience**
- Deloitte has been providing services encompassing **consent and preference management, privacy enabling technology implementations, and privacy program assess, design and build, implement, and operate services** for over 25 years in the US and globally
- Our professionals are skilled with **project management, legal and regulatory, technology, and organizational change management** experience

**Team**
- Our team of **certified privacy-professionals** bring **dozens of years of experience** performing similar services for large, complex clients
- We have **over 4,000 US professionals, and access to 21,000 globally** in the areas of information security and data privacy
- Deloitte ranked **#1** in Market Share for Security Consulting Services based on revenue for **11th consecutive year** in Gartner® Market Share report 4

**Methodology**
- We bring **deep experience** providing consent and preference management services to organizations helping them create a **seamless user experience** across their brands, products, and services
- Our **flexible methodology** is **time-tested** and **efficient**, having been used to assist hundreds of organizations to evaluate, automate and mature their programs and implement enabling privacy technologies, including consent and preference management
- We recognize the impact that implementing a consent and preference management solution may have on the organization, so our recommended approach includes a **significant emphasis on implementing an operating strategy, knowledge transfer, and communications for impacted stakeholders**

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*See Appendix for source*
Deloitte’s experienced professionals
Our practitioners have experience driven knowledge about building and implementing CPM programs leveraging leading market technologies.

150+ IAPP certified Deloitte practitioners globally

200+ practitioners certified in privacy tools across 7 certification programs

Completed 50+ privacy tech implementation projects across a variety of industries

Our CPM clients include:

- US multinational beverage company
- US Fortune Global 500 insurance provider
- Leading US multimedia companies
- US multinational retail corporation
- Major US airline
- US multinational hospitality company
- US multinational medical technologies company
Deloitte’s privacy leadership team

Our leadership team consists of professionals with extensive cross-sector experience in providing privacy and cyber security services.

Linda Walsh  
Managing Director | Cyber Risk  
Deloitte & Touche LLP  
lwalsh@deloitte.com

Dan Frank  
Principal | Cyber Risk  
Deloitte & Touche LLP  
danfrank@deloitte.com

Eric Bowlin  
Partner | Cyber Risk  
Deloitte & Touche LLP  
ebowlin@deloitte.com

Tanneasha Gordon  
Principal | Cyber Risk  
Deloitte & Touche LLP  
tagordon@deloitte.com

Glenn Aga  
Managing Director | Cyber Risk  
Deloitte & Touche LLP  
glennaga@deloitte.com

Nitin Pandey  
Managing Director | Cyber Risk  
Deloitte & Touche LLP  
npandey@deloitte.com
Multinational Biotechnology Company

Overview

Project description: Multinational biotechnology company wanted to replace a homegrown system and centralize consent. Deloitte engaged to perform discovery, implementation, and configuration of the selected Consent & Preference Management (CPM) vendor platform for prioritized uses cases inclusive of US and international markets.

Data subjects: Patients and health care providers (HCPs)

Ownership/governance: IT driven

Scope/approach: Company-wide in a phased approach, inclusive of US and INT markets

Timeline: 3 months (Discovery); 6 months (Release 1); 6 weeks (Future Releases)

Major activities

• Develop an implementation strategy and roadmap based on discovery phase activities
• Perform project initiation to align stakeholders on project scope, timelines, and responsibilities
• Design and implement a CPM governance and operating model
• Develop a data model based on review of existing business rules, inclusive of US and international markets, and recommended/obtain approval for new business rules
• Configure the CPM platform and work with product owners to establish integrations with prioritized US and international platforms/systems to establish a co-master system of record
• Perform SIT and UAT testing and provide hyper-care after go-live
• Support future release cycles to establish the CPM vendor platform as the master system of record

Work products and deliverables

• Implementation strategy and roadmap
• Use case definition and requirements documentation
• Governance and operating model
• Solution architecture
• Configuration and vendor integration
• SIT and UAT test plan, scripts, and summary
• Training material and sessions

Challenges

• Limited appetite for changing business process requiring significant technical workarounds resulting in implementing a new tool, but maintaining old problems
• Multiple business and technical decision makers with conflicting opinions hindering ability to meet critical timelines
• Lack of unique identifier across all systems/platforms

Accelerators

Implementation strategy and roadmap
Governance and operating model
Use case and requirements library
SIT and UAT test scripts

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National Consumer Products Company

Overview

Project description: The client needed a way to collect, process, and share consent and preferences across different systems. Our approach included analyzing the client’s consent data model and architecture to develop a consent and preference management center, which was integrated across platforms, and catalogs consent from various communication channels.

Data subjects: Customers

Ownership/governance: Business driven

Scope/approach: Company-wide in a phased approach by channel

Timeline: 9 months (Phase 1-3)

Major activities

- Conduct discovery sessions to understand the current state consent practices and future goals
- Draft a future-state data architecture for several communication channels across multiple systems and applications
- Implement a customer-facing preference center on the client’s website and mobile apps that aligns with branding requirements
- Integrate the CPM platform across multiple systems including customer relationship management applications, POS systems, and middleware platforms
- Develop training materials, playbooks, and conduct knowledge transfer sessions with the client to be able to operate the newly implemented platform
- Perform system integration and user acceptance testing with stakeholders and resolve identified issues

Work products and deliverables

- Architecture diagrams
- Preference center configuration requirements
- SIT and UAT test scripts
- Knowledge transfer materials

Accelerators

- Architecture Diagram
- Preference Center and Configuration Requirements
- System Integration Testing and User Acceptance Testing
- Knowledge Transfer

Challenges

- The client sought to provide individuals with an omni-channel experience across multiple communication channels (email, text message, mobile OS)
- Consent and preference data couldn’t be exported or reconciled making it difficult to monitor KPIs and meet their business objectives
Sources

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