

The GDPR was adopted on 14 April 2016, and became enforceable beginning **25 May 2018**.

Click each image to learn more.



What is GDPR?



Who is Affected?



What are the Penalties?



To make sure we manage everything in the most efficient, but importantly transparent way for all our colleagues, we also need to keep candidate information and their marketing preferences up-to-date in **one system – Salesforce**.

- Don't use other tools as another database.
- Don't group mails if they have said no.

Remember, you can still call everyone and email 121.

Let's take a look at three key changes and how we need to manage our processes:

Click each item to learn more.

Consent

Transcript

Marketing preferences



Managing Data



Managing Data

We have always placed a big importance on managing our customers and employees data. From securely managing data, to ensuring we are collecting information for the right reason.

Differentiate Services

Personalisation

More Placements

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The way we manage our data and adhering to GDPR will benefit both you and your client.

Drag and drop items against their matching targets and click Submit.

Benefits to You Personally

Benefits to You in Your Work

You know who has your personal data.

Differentiation of your services by reassuring that we better aligned with their requirements.

You control what is done with your personal data.

Provide personalised services by collecting the personal data needed at the right time.

Improved client and candidate confidence.

You get more appropriate, tailored marketing information.

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Before you communicate with candidates, there are two core questions you now need to consider:

Have you got consent to hold their personal data via a signed Registration Form?

Have they 'opted in' to receive marketing emails from us?

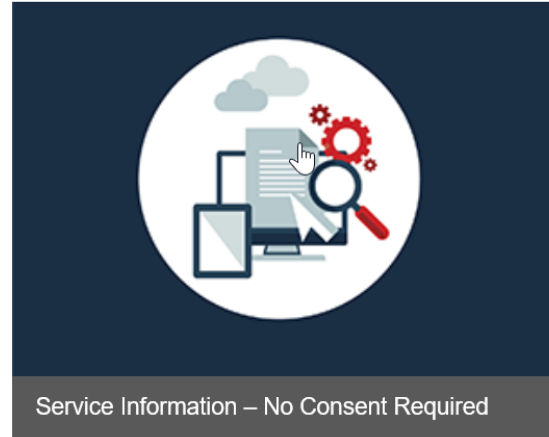
If you've answered **yes to both** – you can put their data on Salesforce and you can send mailers and marketing information to them.

If there is **no signed Registration Form** – you cannot put personal data on Salesforce or keep personal data anywhere on any device.



It is always about **consent**. Marketing information needs consent, whereas with service information there is no consent required.

Click each image to learn more.



Click each image to learn more.



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Let's take a look at a number of scenarios and word tracks you can leverage to ensure you are adhering to GDPR legislation at all times. **remember**, it is not just about compliance. It is the law and it has upsides to differentiate your service – other companies probably will not adhere to the legislation like us and that will be their downfall.

Scenario 1

You gain a referral from a candidate. You can call them and speak with them as normal. However, if you wish to pursue them as a candidate you **HAVE** to ask them if they are ok for us to store their details.

Scenario 2

You obtain the name of a candidate from a client – You can contact them as normal by phone but you have to gain consent via the reg form to store their details on Salesforce – if it's **NO** then you must delete and not store anywhere.

Click each item to learn more.



[Click Here to Read Wordtrack for Scenario 1](#)

[Click Here to Read Wordtrack for Scenario 2](#)

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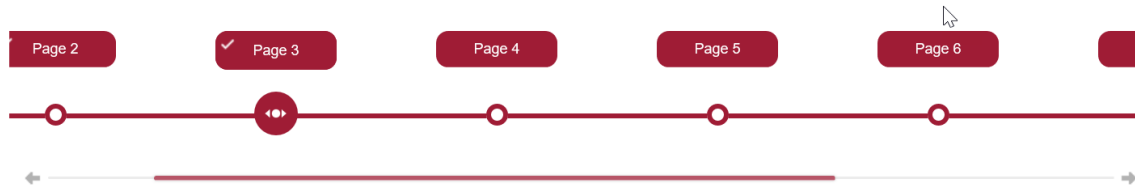




Important: when you parse a CV, it should have **Pre-Registration status** until the DocuSign has been returned.

We can't send marketing messages until the registration form is signed. Before that, you must change their marketing preferences to **none received** by ticketing all unsubscribe.

Click each event on the timeline to learn more.



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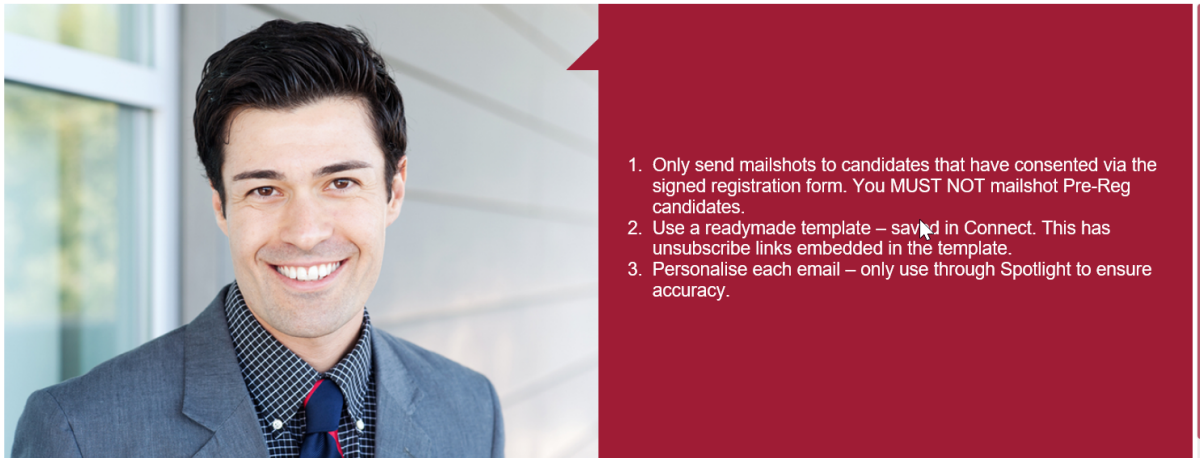
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Consider using a **readymade template** – saved in *Connect* <https://roberthalf.sharepoint.com/sites/gb/marketing-centre/Pages/email-templates.aspx>

Click each card to learn more.

How to Use Mail Effectively ✓

- ◆ Personalise each email with a name – MUST be sent via Spotlight – never via list view and reports.
- ◆ Always use the Bcc - NEVER send to groups with email addresses visible to other recipients.
- ◆ Always use a clear subject line.
- ◆ Don't forget to add your contact details.
- ◆ Keep text simple, to the point and clear and relevant.

Content Tips

Always Check Before Sending

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Email templates <https://roberthalf.sharepoint.com/sites/gb/marketing-centre/Pages/email-templates.aspx>

Click each card to learn more.

Do

Don't

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All UK individuals/candidates/work seekers have a **legal right** to request us to remove their Personal Information from our systems (e.g. Salesforce) if they no longer wish to be represented by us.

Failure to comply with a request carries legal risks and means that Robert Half is in **breach of UK privacy laws** and may be subject to an investigation and/or a financial penalty.

If a candidate uses our *unsubscribe* or *customisation* links in an email, they can unsubscribe or update their own preferences (this is automated at our end), but they **cannot delete** their record from our systems. This needs to be a written or

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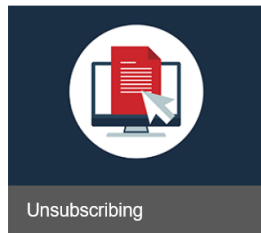
There is a difference between a candidate requesting the **deletion** of their records and **unsubscribing** or **customising** their marketing preferences.

Remember: clarify the candidate's request if you are not sure. Refer to the Marketing Procedure documents on RH Connect for any of the above.

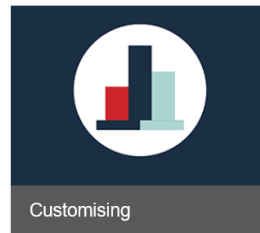
Click each image to learn more.



Deletion



Unsubscribing

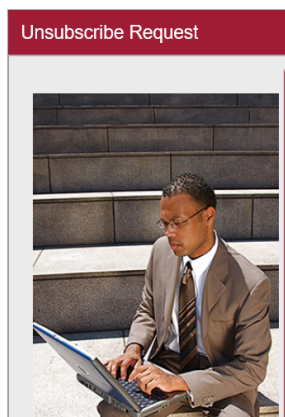
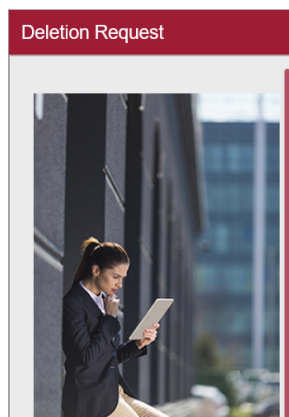


Customising

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When a recruitment consultant receives a request from a candidate/work seeker to have their personal Information and other details removed from our systems, you must do the following.

Click each card to learn more.



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When you receive delete or unsubscribe request, do the following for each:

Delete Request	Unsubscribe Request
Liaise with your DOS if you receive a deletion request	<ul style="list-style-type: none"> Action any unsubscribe marketing requests received via consultant request, DocuSign, email or phone Check the marketing preferences within Salesforce have been updated and the individual's email addresses are deleted where required

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and your bonus!

This means, we **cannot retain separate lists of candidate or client data** in any *personal drives, OneNote, Excel*. The risks are too great for our business. Things should be uploaded onto Salesforce and then deleted from these other systems/devices.

This is good for other consultants who might want to use that information as it is **all in one place**.

Interview process review – any interview notes written on a Pad of paper or on OneNote, or on CV must be uploaded onto Salesforce under *interview notes and under activities* and deleted and paper CV put into confidential waste.

Where to Manage Customer Data

Click each item to learn more.



Option 1

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Question 3

When candidates apply to an advert or through the Robert Half website, which statement is correct?

Choose the correct option(s) and click Submit.

- We must wait until a completed and signed candidate registration form and TOB is returned via DocuSign before parsing the candidate
- Candidates can be parsed and status set to active because we have consent through their application
- A candidate must attend an internal interview before the CV is parsed
- The candidate can be parsed immediately but marketing preferences must be changed to "No marketing", the candidate must also be set to "Pre-reg" status until a signed Candidate Registration form and TOB are returned via DocuSign.

Submit



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We must **change the way we work** at Robert Half and it's hard, but a legal requirement can make a difference to our brand and your bonus!

Remember, we **cannot retain separate lists of candidate or client data** in any personal drives, OneNote, Excel.

ALWAYS record any candidate or client data in **ONE place** - Salesforce!



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