



Opt-In Strategies 101: Your Path to GDPR Compliance



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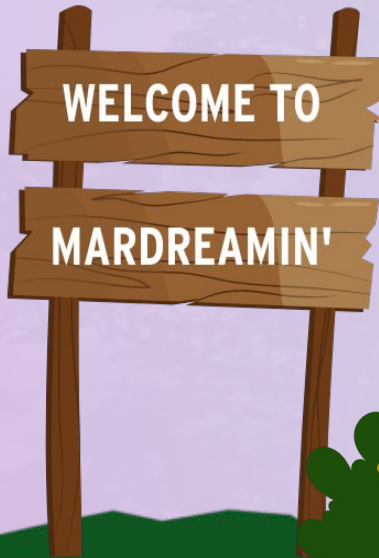

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Agenda



- GDPR Compliance
- Opt-in Methods
- System Prerequisites
- Email Program
- Managing Compliance

GDPR Compliance



What is GDPR Compliance?

GDPR compliance means following the rules set by the General Data Protection Regulation (GDPR), a law in the EU that protects people's personal data.

Ensuring companies:

- Handle personal information responsibly
- Give people control over their data
- Keep it safe from misuse or breaches



How Does GDPR Impact Marketers?

- Get **clear consent** before using personal data
- Be **transparent** about **data collection** and use
- Offer **easy opt-out** options
- Securely store and protect data
- Verify consent before using third-party lists
- Prioritize ethical, privacy-focused data handling



Opt-in Methods



What Options Do I Have?

- **Single opt-in:**
A method where users provide their consent to receive communications by checking an opt-in box on a form.
- **Double opt-in:**
A verification process where users must confirm their subscription by clicking a link in a confirmation email after checking an opt-in box on a form.
- **Granular opt-in:**
An approach that allows users to selectively choose specific types of communications they wish to receive on the form.

Single Opt-in

The opt-in box should **NEVER** be checked by default

Name

Email

Company

Yes, I'd like to receive emails from [Company]. I understand that I can unsubscribe at any time.

SUBMIT

Tailor the opt-in language to fit your company's needs.

IMPORTANT: There is a 255 character limit on Account Engagement (Pardot) field labels.

Double Opt-in

Name

Email

Company

Yes, I'd like to receive emails from [Company]. I understand that I can unsubscribe at any time.

SUBMIT

New Message

To

Subject Confirm Your Subscription

Hi [Name],

Thank you for subscribing! Please confirm your subscription by clicking the link below:

CONFIRM

We're excited to keep you updated!

Best regards,
[Your Company Name]

SEND

Granular Opt-in

First Name	Last Name
<input type="text"/>	<input type="text"/>
Company	Email
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> News	<input type="checkbox"/> Promotions
<input type="checkbox"/> Events	<input type="checkbox"/> Product Updates
<input type="submit" value="SUBMIT"/>	
<p>By subscribing you are consenting to receiving emails from [Company] and agreeing to the storing & processing of your personal data as described in our Privacy Policy. You can unsubscribe at any time.</p>	

The options in your form should reflect your Preference Page(s).



QUIZ: Which form is GDPR compliant?

Form A

Name

Email

Company

Yes, I'd like to receive emails from [Company]. I understand that I can unsubscribe at any time.

SUBMIT

Form B

Name

Email

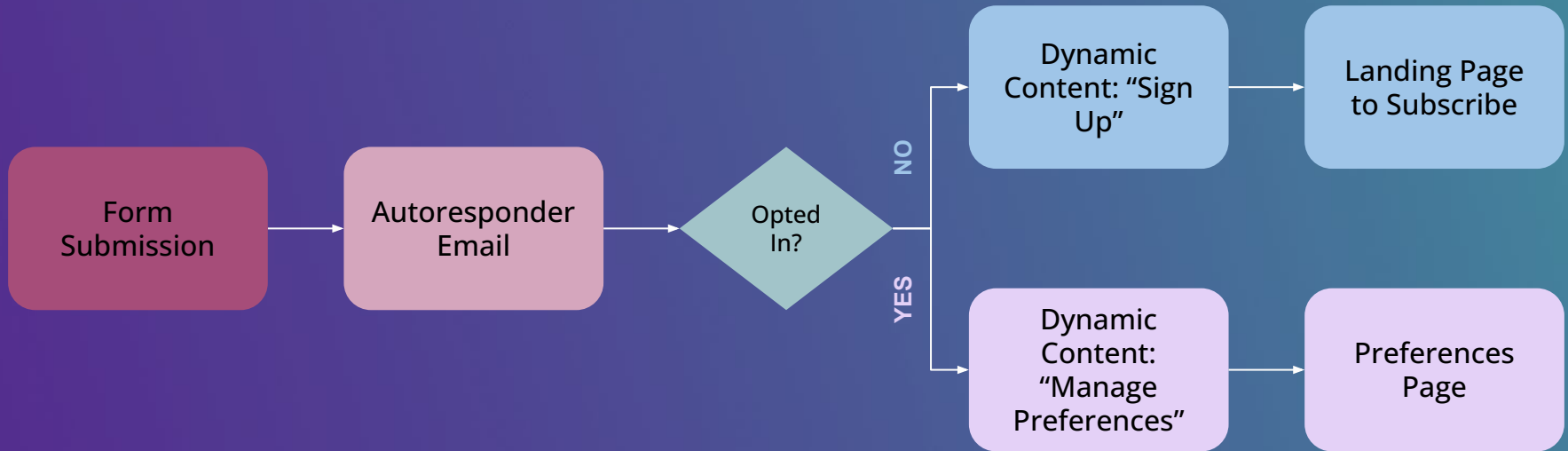
Company

Yes, I'd like to receive emails from [Company]. I understand that I can unsubscribe at any time.

SUBMIT



ArcherPoint's Opt-in Process



System Prerequisites

The background features a soft-focus mountain range with peaks in shades of purple, pink, and blue. A large, faint, stylized arrow is overlaid on the right side, pointing towards the right. The foreground consists of a dark green, wavy horizon line with a small cluster of green plants and yellow flowers on the left.

Required Fields

Account Engagement (Pardot) & Salesforce

Opted in

Opted out

Default

Opt-in Date: MM/DD/YYYY

Opt-out Date: MM/DD/YYYY

Do Not Email

News

Events

Product Updates

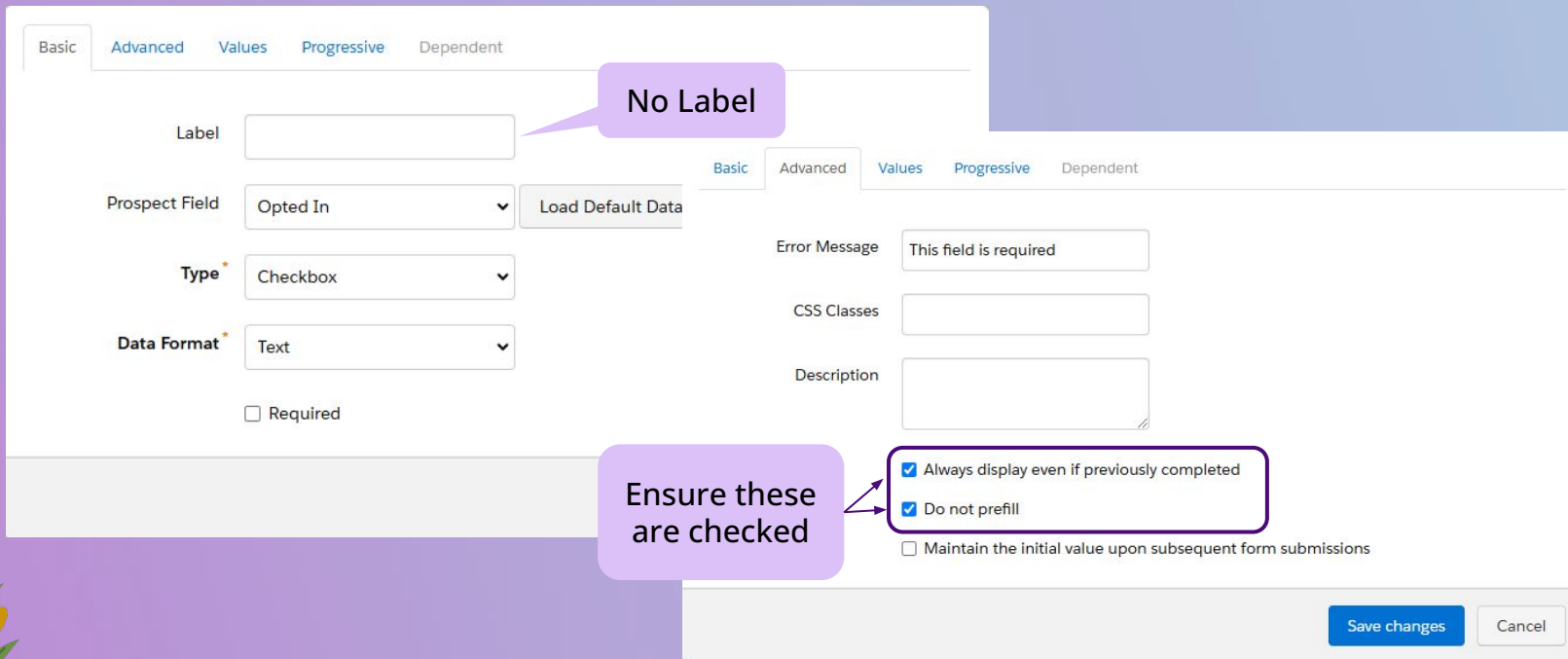
Promotions

Required Automations

*These are advanced automations that must be completed in Salesforce Flows

Name	Purpose	Criteria
Opt-in Date Stamping	Record the date of opt-in for GDPR compliance.	IF Opted In is TRUE AND Opt-in Date is Empty THEN change Opt-in Date to TODAY
Opt-out Date Stamping	Record the date of opt-out for GDPR compliance.	IF email status is Opted Out AND prospects last activity was less than 1 day(s) ago THEN change Opt Out Date to TODAY
*Opt-in Clearing (Optional)	Clear the Opt-in checkbox and field when the Opt-out Date is after Opt-in Date	IF Opted In is TRUE AND Opted Out is TRUE AND Opt-out Date is after Opt-in Date THEN change Opted In to FALSE AND remove Opt-in Date
*Opt-out Clearing (Optional)	Clear the Opt-out checkbox and field when the Opt-in Date is after Opt-out Date	IF Opted Out is TRUE AND Opted In is TRUE AND Opt-in Date is after Opt-out Date THEN change Opted Out to FALSE AND remove Opt-out Date

Opted In Form Field Set Up



The screenshot shows the configuration interface for an 'Opted In' form field. It is divided into two panels: 'Basic' and 'Advanced'. The 'Basic' panel includes fields for 'Label', 'Prospect Field', 'Type', and 'Data Format', along with a 'Required' checkbox. The 'Advanced' panel includes 'Error Message', 'CSS Classes', 'Description', and three checkboxes: 'Always display even if previously completed', 'Do not prefill', and 'Maintain the initial value upon subsequent form submissions'. Annotations highlight the 'Label' field as 'No Label' and the first two checkboxes as 'Ensure these are checked'.

Basic | Advanced | Values | Progressive | Dependent

Label

Prospect Field

Type

Data Format

Required

Advanced | Basic | Values | Progressive | Dependent

Error Message

CSS Classes

Description

Always display even if previously completed

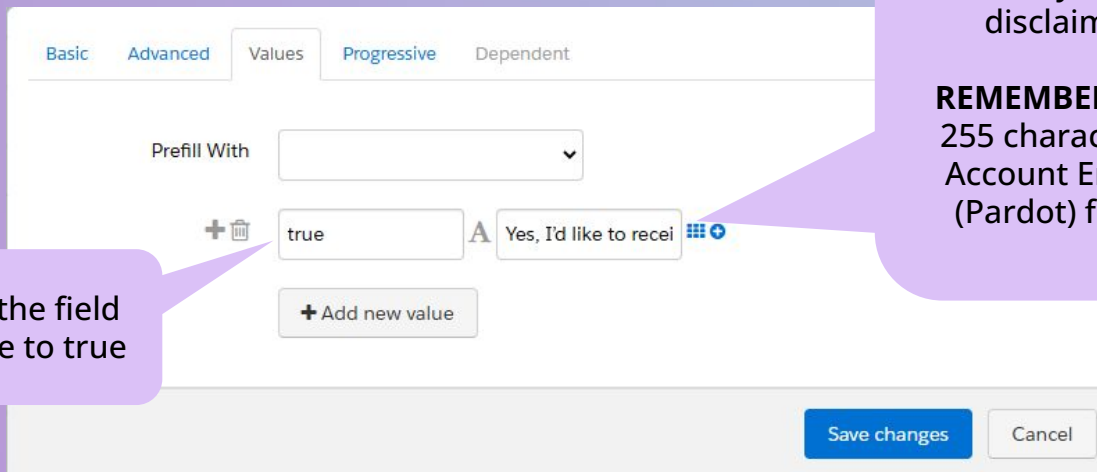
Do not prefill

Maintain the initial value upon subsequent form submissions

No Label

Ensure these are checked

Opted In Form Field Set Up



The screenshot shows the 'Values' tab of a form field configuration. At the top, there are tabs for 'Basic', 'Advanced', 'Values', 'Progressive', and 'Dependent'. Below these is a 'Prefill With' dropdown menu. A list of values is shown below, with the first value 'true' highlighted. To the right of the 'true' value is a text label 'Yes, I'd like to recei' and a plus icon. Below the list is a '+ Add new value' button. At the bottom right, there are 'Save changes' and 'Cancel' buttons.

Set the field value to true

Add your opt-in disclaimer here.

REMEMBER: There is a 255 character limit on Account Engagement (Pardot) field labels.

Email Program

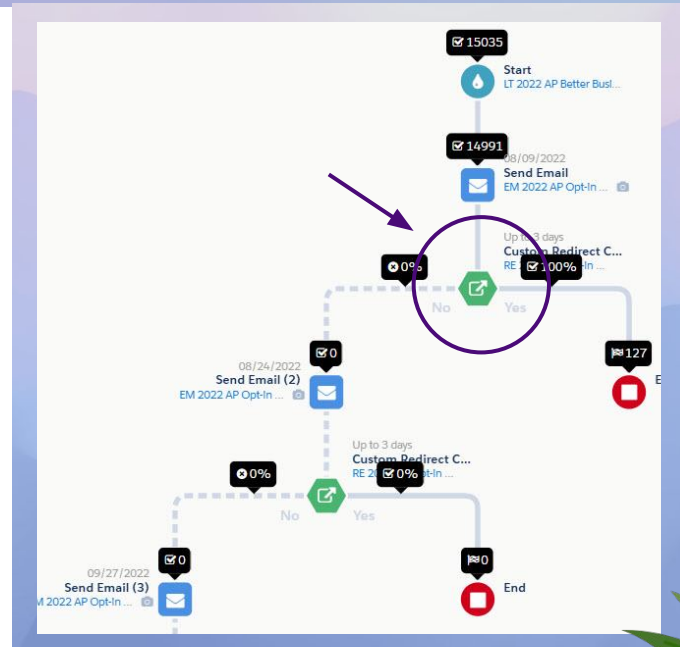


Email Program

- **Objective:**
Opt-in existing prospects in your database
- **Best Practices:**
 - Establish a timeline for the program (e.g., 3-6 months)
 - Send multiple reminders to maximize opt-ins (e.g., 3-5 emails)
 - Set a clear cutoff date
 - After the cut off, give a short grace period (e.g., 1-2 weeks)

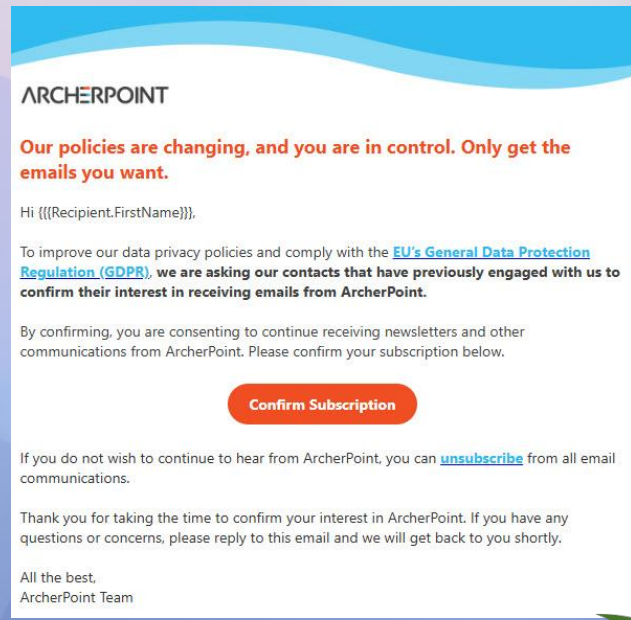
ArcherPoint's Email Program

- **Segments:**
2 programs (i.e., Current Subscribers and Non-Subscribers)
- **Cadence:**
4 emails per program
- **Program duration:**
6 months
- **Branching logic:**
Custom Redirect Click with a wait step of 3 days



Custom Redirect

- **Implementation:**
Button in emails used the custom redirect link
- **Destination URL:**
Preferences Page
- **Completion Actions:**
 - Change Opted In to TRUE
 - Change Opt-in Date to Submission Date



Managing Compliance



Tips for Managing Compliance

- Assign a **GDPR compliance champion**
- **Train your marketing team** regularly
- **Limit editing access** to compliance fields
- **Audit** prospect data regularly
- Use a **master exclusion list** for all emails
- **Update opt-outs** and **honor unsubscribes** promptly

Key Takeaways

- 1. Before Launching Campaign:**
Assign a GDPR lead and ensure team training on compliance practices
- 2. During Campaign:**
Use automations to accurately track opt-in and opt-out dates
- 3. After Campaign:**
Conduct regular audits and use a master exclusion list to maintain data accuracy



Thank You!



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