Mingle Jingle

- Privacy & The Law
- Data Types & Uses
- How You Collect
- Cookies
- Future Uses
- Business Example

Privacy & The Law

- **Loi 25**
- Impact on Business
- Compliance & Customer Privacy

A data breach in 2019, affecting nearly 9.7 million Canadians, created the need for **Loi 25.** The Quebec Bill regulates the collection and storage of personal data, both physical and digital. It is being implemented over a 3 year period, with next **September 2024** being the end of the rollout.

Privacy & The Law

- **Loi 25**
- Impact on Business
- Compliance & Customer Privacy

Key points

- You must obtain **consent** when you collect any data.
- You must **explain** what you're doing with the data and who has **access** to it.
- You must allow people to **opt out** of the collection.
- You need a **process** for when someone asks for their information.

Privacy & The Law

- Loi 25
- **Impact on Business**
- Compliance & Customer Privacy

So what do you need to do?

- Privacy **policy.**
- Privacy **officer.**
- Can't use **existing data** without consent.
- Determine **how long** you need the data, delete after.
- **Employee** data.
- Your **website** will probably need to be updated.

Privacy & The Law

- Loi 25
- Impact on Business
- **Compliance & Customer Privacy**

Penalties under Loi 25 are substantial, ranging from **$15,000** to tens of **millions of dollars.**

Before you do anything I discuss today, make sure you are in compliance with **Loi 25.**

Don't Be Scared

Uses of Data

There's lots of benefit to having a data strategy for your business.

- **Marketing:** Target people who are already familiar with your business or, better yet, have shown interest. Or find people who "look like" your customers.

- **Customer Retention:** Get to know your customers better and make sure you're following up at key points in their buying journey.

Uses of Data

There's lots of benefit to having a data strategy for your business.

- **Business Planning:** Use the data you already have to make smart business decisions.

- **Automation:** Let related systems talk to each other, breaking down technology silos and making your staff more efficient.

What are You Gathering?

What types of data are of most use to your business?

- **Personal Information:** Name, birthday, marital status.

- **Contact Information:** Emails, phone numbers, and even home addresses that you can use to promote your business.

- **Engagement:** How often do they interact with your company and in what forms, including purchase history?

- **Intent:** What are they interested in and how soon are they planning to buy?

Data Types

- **Data Types**
- Collection Methods
- Active Data Gathering
- Data Storage
- Uses

- **1st Party:** Data you collect on your customers for yourself.

- **2nd Party:** Data that someone collects for you specifically.

- **3rd Party:** Data someone else collects and sells to a lot of people.

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How Do You Collect Data?

- Data Types
- **Collection Methods**
- Active Data Gathering
- Data Storage
- Uses

- **Buy It:** Data sellers with **lists** of potential customers**.**

- **Passively Gather It:** Collecting data indirectly, largely through **cookies.**

- **Actively Gather It:** Through publicly available sources or through your interactions with leads and customers. **Forms** are a common way to collect this information.

How Do You Collect Data?

- Data Types
- Collection Methods
- **Active Data Gathering**
- Data Storage
- Uses

Forms come in different... forms.

- **Sign Up Forms:** Used for newsletters or events.

- **Surveys & Feedback Forms:** Help improve products and services based on user experiences and opinions.

- **Contest Entries:** Increase engagement and collect valuable data through promotions and contests.

How Do You Collect Data?

- Data Types
- Collection Methods
- **Active Data Gathering**
- Data Storage
- Uses

- **Contact Forms:** Gather basic contact information, normally generating an email. Could be entered into a database.

- **Request for a Quote Forms:** Gather specific customer needs to provide tailored service offerings, often acting as a lead generator.

- **eCommerce Forms:** Manage order fulfillment by collecting payment, shipping, and billing information.

How Do You Collect Data?

- Data Types
- Collection Methods
- Active Data Gathering
- **Data Storage**
- Connections

Common Data Storage Methods

Databases: Any form of structured customer information. Quickbooks is a database, but so is Excel.

Marketing Platforms: Specializes in various forms such as email marketing and automation (Mailchimp).

CRM Systems: Centralizes customer interactions and sales data. Salesforce is one commonly used example.

How Do You Collect Data?

- Data Types
- Collection Methods
- Active Data Gathering
- Data Storage
- **Connections**
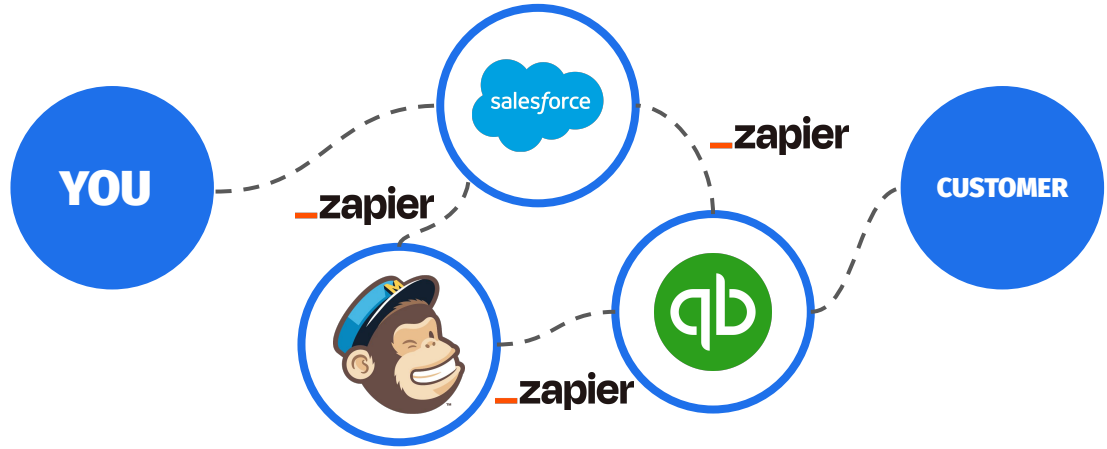
Our data is often stored in different **siloed** systems.

Systems can automate and centralize data, making your teams more efficient and reduces errors.

Cookies

Websites leave "cookies" on our devices that allow them to track us.
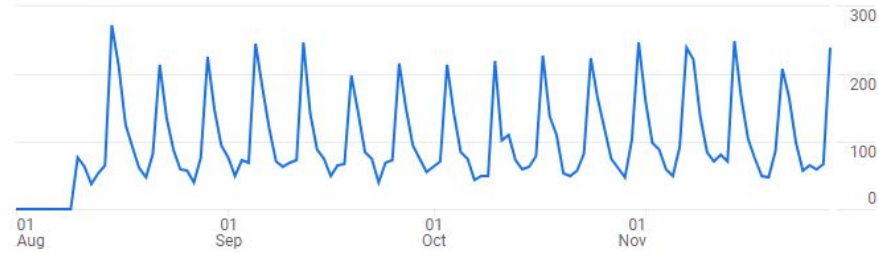
Cookies

- What are they?
- **Personalized versus non-personalized**
- Analytics
- Retargeting

Personalized data from cookies enhances the user experience based on individual behavior, such as page visits and shopping preferences.

Non-personalized data focuses on aggregate user behavior without identifying individuals - like website analytics.

Cookies

- What are they?
- Personalized versus non-personalized
- **Analytics**
- Retargeting

Website and Social Media Analytics

- Track engagement with your content on both social and website

- Understand your customers digital purchase journey

Cookies

- What are they?
- Personalized versus non-personalized
- Analytics
- **Retargeting**

Retargeting is a data strategy where you target ads to users who have interacted with your site.

- **Example – Specific Page View**
  Target people who visit your custom landscaping page with video ads that showcase your work.

- **Example – Abandoned Carts**
  Target ads to users who have added something to their cart but not purchased.

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Cookies

- What are they?
- Personalized versus non-personalized
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- **Retargeting**

Fiona Daly
@FionaSDaly

I just overheard a woman say she uses her boyfriend's laptop to Google Christmas presents she wants so that he gets targeted ads. Communication in the digital age: a love story.

Forward Thinking

What is the future of data and how will AI influence it?

Forward Thinking & AI

- **Current AI**
- AI Uses
- Privacy Concerns

Small businesses primarily use a handful of artificial intelligence systems.

ChatGPT – The most popular AI system, allowing content and image generation.

DeepL – Translation of text and documents.

MidJourney – Focus is primarily on image creation, including photorealistic.

A realistic photo of a male white mid 40s small business owner looking at an ipad in front of shipping boxes.

A realistic photo of a muscular squirrel on a treadmill at a gym in the woods.

Forward Thinking & AI

- Current AI
- **AI Uses**
- Privacy Concerns

AI Uses
You can upload your data and let **AI** understand your business and customers.

- **Digital Analytics –** Analyze your social media posts and see which content generated the most engagement - and sales.

- **Content Generation –** Have Chat GPT generate similar content.

Forward Thinking & AI

- Current AI
- AI Uses
- **Privacy Concerns**

Privacy Concerns
When you upload your data to an AI service like **ChatGPT,** you are potentially exposing it to others - beware of **Loi 25.**

The rules around **Privacy** and **AI data analysis** will continue to mature and evolve.

Summary

Today we've discussed

- What types of data you can collect
- How you can legally collect it
- Reasons why you should be collecting data right now

Let's look at a business example.
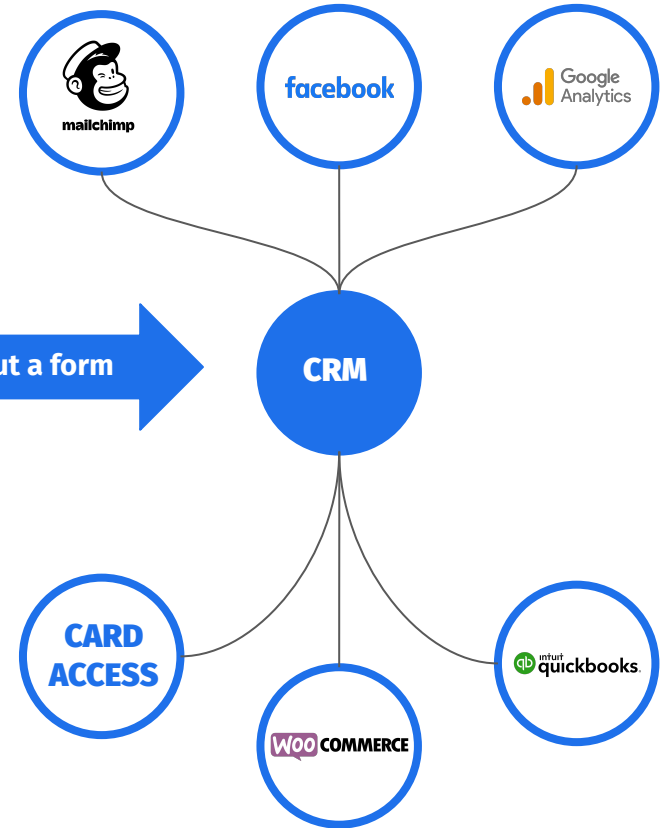
Business Example

Pontiac Fitness offers access to a gym through a monthly membership, as well as coaching. They sell apparel featuring their very popular mascot online and in store. Their data strategy includes:

- **Lead Generation Form –** Website offers free 1 hour personal consultation if you sign up.
- **Membership Database –** Handles billing, renewals, key card access and other generation information.
- **eCommerce Store** - WooCommerce for Wordpress
- **Newsletter** sign up with Mailchimp
- **Remarketing** pixel for Facebook
- **Google Analytics**
- **CRM –** Centralizes all data and communication

Business Example

Fills out a form

NEW CUSTOMER

CRM

mailchimp · facebook · Google Analytics

CARD ACCESS · WOO COMMERCE · quickbooks

Business Example

Drip Email Marketing – receive an automated series of emails over a period of days or weeks, designed to encourage a sale.

Custom Audiences - This form also sends the user's information to **Facebook,** where it delivers ads **exclusively** to those on the list.

Remarketing - People who visit a "new year/new you" offer page will be **retargeted** with an ad on Instagram with an additional discount if they sign up.

PONTIAC FITNESS

Alerts on Declining Key Card Access – If someone stops coming to the gym regularly, they receive a personalized letter of encouragement.

Pontiac Fitness' Data Strategy allows them to:

- Use data to deliver more effective marketing
- Convert more leads into paying customers
- Reduce customer churn
- Eliminate manual work

Grants for Data Strategy

CDAP provides larger small businesses with a grant to create a **digital data adoption plan.**

Calumet Media is an approved **CDAP** Advisor.

Jon Stewart

jon@calumetmedia.ca

819-453-2010