

How do you ensure  
regulator & GDPR  
compliance? ✓

Compliance is a big deal & needs to be taken  
seriously to stay on the right side of the law

When your compliance procedure  
isn't watertight, you risk:

 7-figure fines

 Penalties

 Reputational damage

**One small slip-up could cost you big time** 

Here are some tips to stop  
you falling short 🙌

# At the very least, make sure you:

- 1 Implement data governance - what is stored, who uses it, how & why?
- 2 Provide staff training to ensure manual admin tasks are performed correctly
- 3 Have clear policies in place to prevent security breaches
- 4 Keep your IT systems secure & up-to-date
- 5 Make data consent explicit & keep your privacy policy accurate & accessible

**Still concerned?**



A CRM with built-in compliance templates  
could be just what you need...

Here are 5 ways FLG could help you 

# 1. GDPR compliance

- ✓ Records 'opt-ins' & easy 'opt-out'
- ✓ Respond to requests for customer data by exporting it from the lead record
- ✓ Permanently delete data

The screenshot shows a web interface for editing a lead record. The title is "Edit Lead". Below the title, there are several sections, each with a dropdown arrow on the left and a "Hide" link on the right:


- Contact Details:** This section contains several input fields:
  - Title & First Name: A dropdown menu is set to "Mr." and the text "Daniel" is entered in the adjacent field.
  - Last Name: "Beckett"
  - Company: "FLG"
  - Job Title: (empty)
  - Phone Number: "01282798545"
  - Alternative Phone Number: (empty)
  - Email Address: "daniel.beckett@flgtechnolog"
  - Address: "Ribble Court" (with a second empty line below it)
  - Town/City: "Burnley"
  - Postcode: "BB12 7NG"
  - At the bottom of this section is a checkbox labeled "Copy contact details to any linked leads", which is currently unchecked.
- Additional Information:** This section is currently empty and has a "Change" link on the right.
- Contact Preferences:** This section contains five rows of radio button options:
  - Permission to **Phone**: Unknown (unselected), No (selected), Yes (unselected)
  - Permission to **Text Message**: Unknown (unselected), No (selected), Yes (unselected)
  - Permission to **Email**: Unknown (unselected), No (unselected), Yes (selected)
  - Permission to **Mail**: Unknown (unselected), No (selected), Yes (unselected)
  - Permission to **Fax**: Unknown (unselected), No (selected), Yes (unselected)
- Cost, Value & Billing:** This section is currently empty and has a "Change" link on the right.
- Source Details:** This section is currently empty and has a "Change" link on the right.

At the bottom right of the form, there are two buttons: "Cancel" and "Update".

## 2. User compliance & platform permissions

✓ User privileges control what they can see & do

✓ Build step-by-step call scripts so nothing is ever missed



↓ Permissions

User Active:

Access to Leads:  Enable create leads  
 Enable delete leads  
 Enable pick up leads  
 Enable view leads  
 View all leads  
 View only self assigned leads  
 View only group assigned leads  
 View only associated partner leads

Managing Leads:  Enable print view lists of leads (and paging)  
 Enable export leads & lead activity  
 Enable bulk actions  
 Enable edit lead details  
 Enable view/reset billing point  
 Enable view/edit lead cost  
 Enable view/edit lead value  
 Enable add notes, emails, tasks & other items  
 Enable delete notes, emails, tasks & other items  
 Enable edit user  
 Enable edit lead type  
 Enable edit status  
 Enable edit introducer  
 Enable edit source details  
 Enable view introducer/source fields & details  
 Enable partner referral  
 Enable unrefer, return & reverse leads  
 Enable view/manage linked leads  
 Enable access to forms/journeys from lead summary

Teams:  Enable user to send messages to other users  
 Enable access to availability calendar of other users  
 Only access availability of users in own group(s)

✓ Templates for accurate & consistent communication across multiple channels, every time

Send Letter Open Lead in New Window


Contact & Reference Uservice Instructions (139435611)	Address Ribble Court
Town/City Burnley	Postcode BB12 7NG

Template: Your PPI claims

Letter Description:  
Your PPI claims

Source | Copy | Paste | Undo | Redo | Bold | Italic | Underline | Strikethrough | Text Color | Background Color | Styles | Format | Font | 11

Please Quote Ref: 139435611  
Telephone: 01282 798545  
Email: [contact@getflg.com](mailto:contact@getflg.com)



Uservice Instructions  
Ribble Court  
Burnley  
BB12 7NG

27th Mar 2019

RE: Your PPI Claim(s)

Dear Uservice Instructions,

body span

Add To Print Spool  Create a Task Next

Cancel Create



# 3. Audit logs & reports

- ✓ Complete lead timeline
- ✓ Account-wide, time-stamped audit trail
- ✓ Audit history shows details such as edits & status changes

The screenshot displays a CRM interface for a lead. At the top, there are tabs for 'Summary' and 'Details', and a '1 Linked Lead' indicator. Below the tabs is a navigation bar with buttons for 'Converted', 'New', 'Valid', 'Cont', 'Qual', and 'Conv Active'. The main content area is divided into two columns of information:

<b>Contact &amp; Reference</b> Mr. Example Lead (Made Up Co.) (144719915)	<b>Lead Group &amp; Type</b> Leads > Lead
<b>Date &amp; Time Received</b> 2nd Aug 2019 10:56	<b>Status &amp; Assigned User</b> Active (Daniel Beckett)
<b>Phone Number</b> Call   Text   01282798545	<b>Alternative Phone Number</b> None
<b>Email Address</b> OK   contact@flgtechnology.co.uk	<b>Notes</b> None
<b>Edition</b> Concierge Edition (5 Users)	<b>Account ID</b> 10978
<b>Billing Email Address</b> None	<b>Flow XO Account Added</b> None

Below the information grid is a toolbar with buttons for 'Edit', 'Self Assign', 'New', 'Forms', 'Journeys', 'Workflows', 'Type', 'Status', and 'User'. There are also dropdown menus for 'Introducer', 'Referral', and 'More'. A section titled 'New Customer Workflow (4 of 9 Done) Details..' contains a list of events:

- Appointment** (Today 11:54): Created & actioned by Daniel Beckett. Appointment was at 14:00 until 14:45.
- Email** (Today 11:43): Opened. Sent by System. Subject: 'Getting support from FLG'.
- Email** (Today 11:38): Opened. Sent by System. Subject: 'Hello from Daniel Beckett at FLG'.
- Email** (Today 10:56): Opened. Sent by System. Subject: 'Hello from Daniel Beckett at FLG'.

At the bottom, there are 'Filters' and 'Export' buttons, and a pagination bar showing '1 to 4 of 4' with navigation arrows for '<< First', '< Prev', 'Next >', and 'Last >>'.

Report: Audit Report

Date Range: (date of action)  
Today  
 02/08/2019 - 02/08/2019

User: (associated user)  
 [All Users]

### Reports

★ Saved Reports

	Date Time	Auth Type	Auth ID	Auth Name	Lead ID	Action	Details	Ip Address
<input type="checkbox"/>	02/08/2019 13:01	User	10	Demo Administrator	<a href="#">144724903</a>	LEADVIEWED	Lead summary viewed	62.232.252.196
<input type="checkbox"/>	02/08/2019 13:01	User	10	Demo Administrator	<a href="#">144724903</a>	LEADVIEWED	Lead summary viewed	62.232.252.196
<input type="checkbox"/>	02/08/2019 13:01	User	10	Demo Administrator		AUTHSTATUS	Signed in (via support access)	62.232.252.196
<input type="checkbox"/>	02/08/2019 13:00	User	40730	Demo User	<a href="#">144724903</a>	LEADVIEWED	Lead summary viewed	62.232.252.196
<input type="checkbox"/>	02/08/2019 13:00	User	40730	Demo User	<a href="#">144724903</a>	LEADSTATUS	Status changed from New to Contacted	62.232.252.196
<input type="checkbox"/>	02/08/2019 13:00	User	40730	Demo User	<a href="#">144724903</a>	LEADVIEWED	Lead summary viewed	62.232.252.196
<input type="checkbox"/>	02/08/2019 13:00	User	40730	Demo User	<a href="#">144724903</a>	LEADEDIT	Lead details edited through Lead Edit (changed Address Line 1: "" > "123 Example Street", Town/City: "" > "Some Town", Postcode: "" > "BB12 7NG")	62.232.252.196
<input type="checkbox"/>	02/08/2019 12:59	User	40730	Demo User	<a href="#">144724903</a>	LEADVIEWED	Lead summary viewed	62.232.252.196
<input type="checkbox"/>	02/08/2019 12:59	User	40730	Demo User	<a href="#">144724903</a>	LEADUSER	Assigned User changed from Demo User to Demo Manager	62.232.252.196
<input type="checkbox"/>	02/08/2019 12:59	User	40730	Demo User	<a href="#">144724903</a>	LEADNEW	Lead received through New Lead (User)	62.232.252.196
<input type="checkbox"/>	02/08/2019 12:58	User	40730	Demo User		AUTHSTATUS	Signed in (via support access)	62.232.252.196
<input type="checkbox"/>	02/08/2019 12:57	User	44651	Andrew Taylor		AUTHSTATUS	Signed in (via support access)	62.232.252.196

Optional logs & reporting on granular account info

# 4. Call notes & recordings

✓ Automatic call notes & recordings via integrations with dialler & telephony services including **Aircall** and **CircleLoop**

The screenshot displays a CRM interface for a lead. At the top, there are navigation tabs for 'Summary' and 'Details', and a status indicator 'No Linked Leads'. Below this is a filter bar with buttons for 'Open 1 Day', 'New New', 'Valid', 'Cont', 'Qual', and 'Conv'. The main content area is divided into several sections: 'Contact & Reference' (Mr. Mike Emery), 'Lead Group & Type' (\_Mike's > Conveyancing), 'Date & Time Received' (30th May 2019 09:45), 'Status & Assigned User' (New (Mike Emery)), 'Phone Number' (01282798545), and 'Alternative Phone Number' (None). An 'Email Address' field shows 'example.user@flgtechnology.co.uk'. Below these fields is a toolbar with buttons for 'Edit', 'New', 'Forms', 'Journeys', 'Workflows', 'Type', 'Status', 'User', and 'Introducer', along with 'Referral' and 'More' dropdowns. A 'Telephone Call' event is highlighted, showing a star icon and the text 'Today 12:26'. A call log entry details: 'Answered outbound call to: 01282 798545', 'Aircall number: 0161 768 1702', 'Call made by: Mike Emery', 'Start time: 12:26:55', 'End time: 12:27:03', and 'Duration: 8 seconds'. Below the call log is a 'Call notes' section with the text: '31/05/19 12:27 (Mike Emery) Spoke to applicant about his fact find and collected details about current outgoings.' The call log and notes are contained in a box with a close button (X) and a refresh button (circular arrow). At the bottom, there are 'Filters' and 'Export' buttons, and a pagination bar showing '1 to 1 of 1' with navigation buttons for '<< First', '< Prev', 'Next >', and 'Last >>'.

## 5. Secure data storage

- ✓ Secure data, hosted on compliant servers in an ISO 27001 certified data centre
- ✓ Complete backups of all customer data taken & transferred to a duplicate secure facility
- ✓ No data transferred outside of the UK

**Never worry about compliance again**

To learn more, contact me on

[lauren.shaw@flgtechnology.co.uk](mailto:lauren.shaw@flgtechnology.co.uk)

or book a demo at

[getflg.com/sign-up](https://getflg.com/sign-up)