

GETTING FROM POINT A TO B TO C (CPA)

REDCL^{VER}
ADVISORS

These 5 steps map out what you need to do to put privacy first for your business and your customers.

1



TACKLE YOUR PRIVACY NOTICE

Work with your stakeholders and privacy professionals to craft privacy documents that reflect your business. Then put it someplace everyone can see it.

2



PRIVACY IS A TEAM EFFORT

Your employees are the ones who do the daily work of privacy: consumer questions, individual rights requests, vendor management, marketing. Give them the training they need for success.

3



ARE YOUR RECORDS UP TO DATE?

Start with a data inventory to assess the lifecycle of personal information, who has access to data, what qualifies as sold, and how you're securing information.

4



REVIEW YOUR VENDORS

If vendors don't handle personal data correctly, it's a compliance risk. Work to assess contracts and implement effective vendor management processes and best practices.

5



MAKE PRIVACY EASY FOR YOUR CUSTOMERS

Help your customers manage their privacy and their relationship with you through a robust preference center.

Getting to CCPA compliance can be a manageable process for all businesses. **Reach out to our team** at Red Clover Advisors today to start with your consultation.

www.redcloveradvisors.com

