# MANAGING CONSENTS

## Why is managing consents from your contacts so important?

Canada's Anti-Spam Law (CASL) has been in effect since July 1, 2017 and prevents companies from sending promotional emails without having obtained an express or implied consent from the recipient.

The GDPR has different criteria from CASL but still requires obtaining consent. When it comes to the American law, CAN-SPAM, obtaining consent is not required by law, nevertheless it is still considered best practice to do so: it's never recommended to send unsolicited emails.

**EXPRESS CONSENT**
The person gave their consent to receiving emails from you. For example, when they sign up to your email list from your website.

**IMPLIED CONSENT**
You can demonstrate having a business or personal relationship with the person. For example, you can communicate with your clients for up to 24 months after their last purchase.

**In order to respect the law, you need to be able to prove that you have obtained a consent from every contact on your list.**

## Consent source

In each contact's profile you will find information on his or her consent: the type (express or implied), the source (where it comes from), the date, and the proof. This information could have either been saved automatically through our system (for example, when a contact subscribes to your email list through a subscription form generated from your account) or saved manually when adding or modifying a contact profile (example: during an import). The source of the consent is an important piece of information: it establishes the circumstances in which you received the permission from your contact to send them emails. Here are the possible consent sources available and what they mean:

# ✓ THE "EXPRESS" CONSENT

**OPT-IN** (through a subscription form)
The contact has confirmed their subscription through a form generated by our application.

**CONSENT BLOCK OR TEMPLATE**
The contact has confirmed their subscription by clicking on a confirmation link in a consent block or template.

**EXPRESS CONSENT**
(selected when adding or modifying a contact profile)
You can confirm that the contacts in this particular list have given you consent to send them emails and you can provide proof (ex: you have a paper form).

**PURCHASED EMAIL ADDRESSES**
You have acquired a list of email addresses from a seller that possesses proof that each person on the list has given an express consent to receiving promotional emails from the seller himself and their partners.

**CONTEST PARTICIPANTS**
A list of participants who have entered a contest and checked a box confirming that they agree to receive your promotional emails and have signed it.

The express consent doesn't expire. When you have an express consent, you can communicate with your contacts freely unless they unsubscribe. That's why this is the best type of consent to have.

# ✅ THE "IMPLIED" CONSENT

**Certain types of implied consents have an expiration date!**
This means that in order to continue to communicate with these contacts, you must ask them to confirm that they want to receive emails from you before their consent expires.

**Pro tip:** Our system offers tools to manage consents that are about to expire. To use this functionality, you need to indicate the date of consent for each contact.

### ACTIVE CLIENTS
All the contacts in this list are active clients that currently receive regular receipts from you.

**Expiration: 2 years (from the end date of the contract or from the date of their last purchase)**

### INACTIVE CLIENTS
All the contacts in this list are inactive clients, they do not receive regular receipts from you.

**Expiration: 2 years (from the end date of the contract or from the date of their last purchase)**

### INFORMATION REQUESTS
All the contacts in this list have made a request to receive a quote or information, but they are not currently your customers.

**Expiration: 6 months (from the date the request was made)**

### BUSINESS CARDS
You hold all the business cards of the people on this list and the commercial emails you will be sending them are related to the sector of activity of their company or their role within the company.

**Expiration: none**

## MEMBERS OF AN ASSOCIATION
Every contact in this list is a member of your association.

**Expiration: 2 years (after the date their membership expired)**

## EMPLOYEES
All the contacts in this list are currently working for your business.

**Expiration: none (if the employee leaves you must manually remove them from the list on their last day of work)**

## PARTNERS
All of the contacts on this list are people with whom you currently have a partnership and the emails you will send them relate to your common interests or contain information relevant to your partnership.

**Expiration: none (when the partnership ends you must manually remove them from this list)**

## PUBLICLY LISTED EMAIL ADDRESSES
A list of publicly posted email addresses that you found online with no mention that unsolicited commercial messages are prohibited. The emails that you will you send to these addresses are related to their business activities or the person's role within the company.

**Expiration: none (note the date and where you found the email. For example, save the screenshot and URL of the web page.)**

## MIXED LIST
The contacts in this list come from different sources, but you have proof that they want to receive emails from you.

**Expiration: 6 months**

## UNSPECIFIED OR UNKNOWN:
These contacts have been added or updated manually in the application without specifying the source of consent. We recommend that you update the source of your contact's consent as soon as possible.

**Expiration: none, since the expiry date is not available.**

# BEST PRACTICES

## SEGMENT YOUR LISTS BEFORE IMPORTING THEM

During the import, you can specify the source of consent for each list, depending on the origin of each contact or the relationship you have with them. Once this information is saved, it will be easier for you to manage the consents of your contacts with the tools available in the application.

▶ If you do not have all the information, know that you can change the consent of each contact individually or re-import a list to update the data.

▶ If the existing consent data in the system is more accurate than the one you are importing (for example, the contact has confirmed their consent in the meantime), please rest assured that the most valuable information will be kept.

## TRANSFORM IMPLIED CONSENTS INTO EXPRESS CONSENTS

**It's always best to obtain an express consent from your contacts, supported by a date and proof of consent.** For example: by subscribing through one of our subscription forms, the contacts added to your list will have expressly consented to receiving your emails, and proof of this will be kept in your account.

## USE OUR TOOLS!

The tools available will never automatically remove contacts from your lists, even if their consent has expired. They are to be used at your own discretion to help you manage the consents in your account.

**Subscription forms**
Get an express consent from your new subscribers with all the necessary proof stored on our system.

**Consent blocks**
These blocks can be added to your templates, and the nice thing is that only your contacts with implied consents will see them. They contain links that allow them to confirm their consent to expressly subscribe to your email list.

**Marketing automation**
Create a scenario to automatically collect  express consents from your contacts.

**Send a reminder to the contacts who have an approaching consent expiry date:**

▶ Sign up to receive a monthly email consent report that will inform you about the status of the consents in your account.

▶ See the list of contacts whose expiration date is approaching directly from your dashboard.

## LEARN MORE

**CASL:**
https://www.cyberimpact.com/casl/
https://crtc.gc.ca/eng/internet/anti.htm
http://combattrelepourriel.gc.ca/eic/site/030.nsf/fra/00304.html

**GDPR:**
https://www.cyberimpact.com/en/cyberimpact-helps-canadian-businesses-comply-gdpr/