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Getting Salesforce ready for the GDPR

Stephan Chandler-Garcia
Salesforce Architect - Methods



SALESFORCE
CERTIFIED

Administrator

SALESFORCE
CERTIFIED

Platform App
Builder

SALESFORCE
CERTIFIED

Advanced
Administrator

SALESFORCE
CERTIFIED

Sales Cloud Consultant

SALESFORCE
CERTIFIED

Development Lifecycle
and Deployment Designer

SALESFORCE
CERTIFIED

Platform Developer I

SALESFORCE
CERTIFIED

Data Architecture and
Management Designer

SALESFORCE
CERTIFIED

Sharing and Visibility
Designer

SALESFORCE
CERTIFIED

Application Architect

Stephan Chandler-Garcia

Salesforce Architect - Methods

Founder - GDPR Superheroes

@sgarcia421

#dreamOle18

Trailblazer
COMMUNITY
UK Public Sector
User Group



Barcelona 2018

GDPR Superheroes

Collaboration!

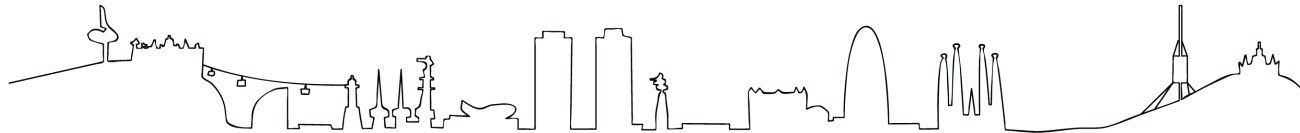
Power of the conversation



12 Events!

1500 Attendees!

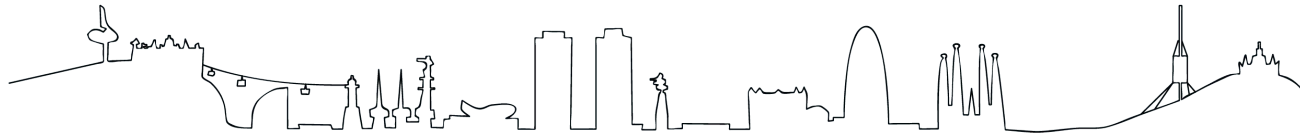
8 User Groups!



Getting Salesforce ready for the GDPR

Overview

- GDPR & Personal Data
- The Salesforce Approach
- The Individual Object
- Key Takeaways
- Demo!





The Problem:

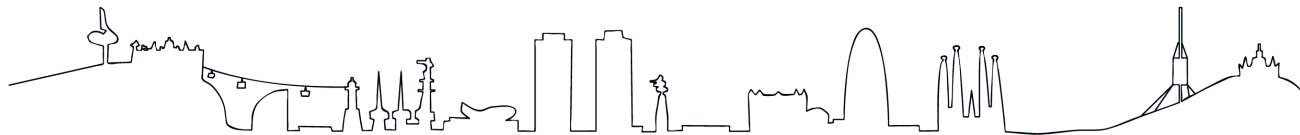
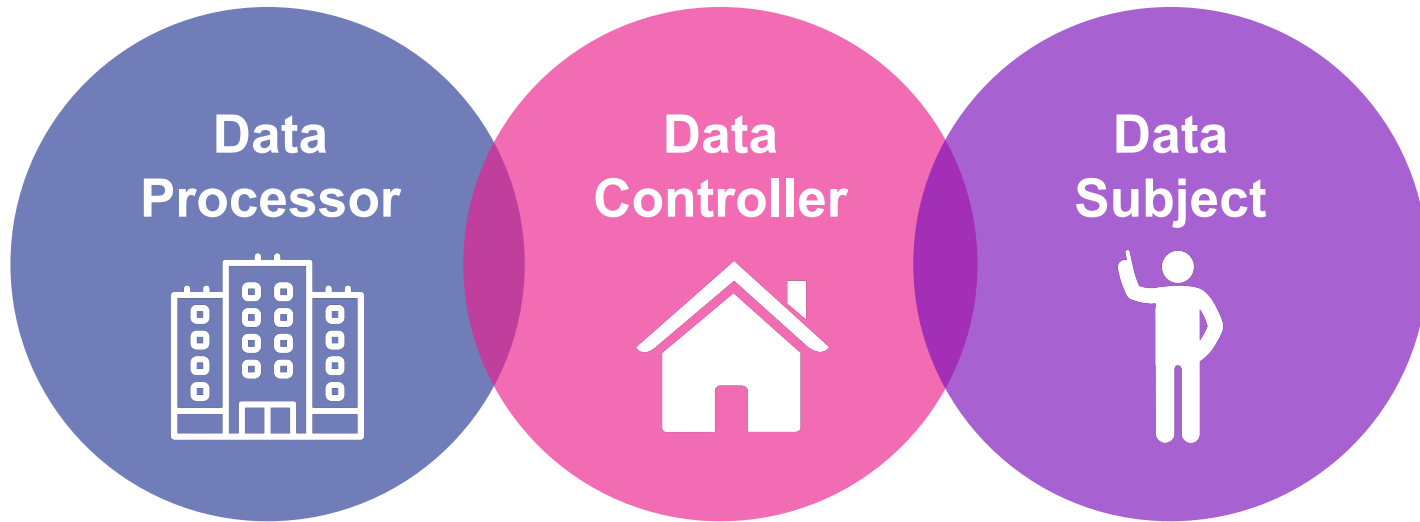
Salesforce can be TOO EASY

GDPR & Personal Data

What do I need to know?



GDPR & Personal Data

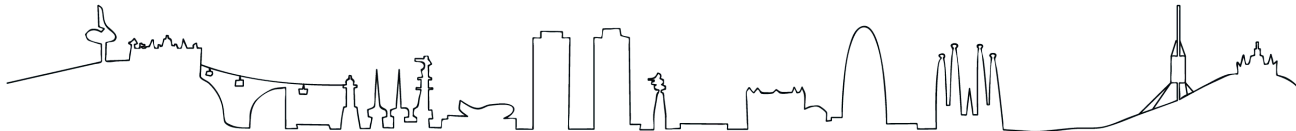


GDPR & Personal Data

Personal Data

any information relating to an identified or identifiable natural person;

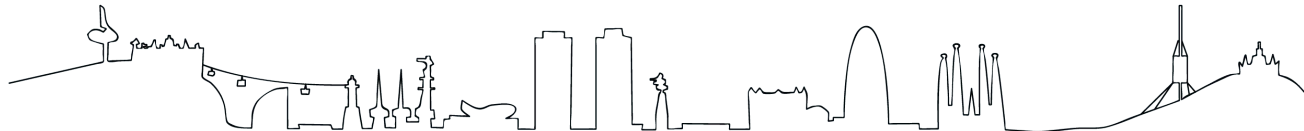
Direct Identifiers	Online Identifiers	Indirect Identifiers
Name Contact Details ID Number Location Data	IP Address Cookies RFID Tags	Physical Physiological Genetic Mental Economic Cultural Social Identity



GDPR & Personal Data

Processing

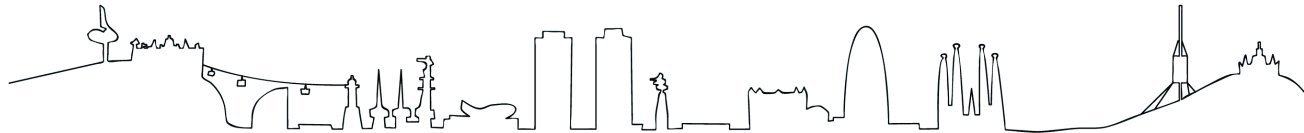
Any operation or set of operations which is performed on personal data or on sets of personal data, **whether or not by automated means**, such as **collection**, recording, organisation, structuring, **storage**, adaptation or alteration, retrieval, consultation, **use**, disclosure by transmission, dissemination or otherwise making available, alignment or combination, restriction, erasure or **destruction**.



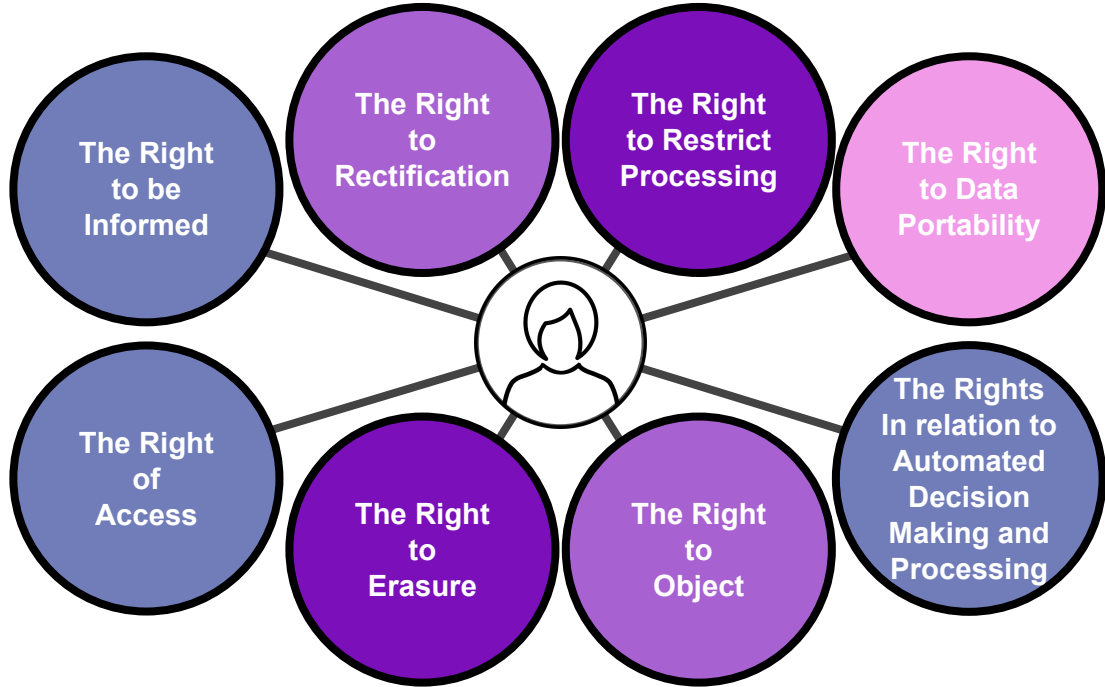
GDPR & Personal Data

Profiling

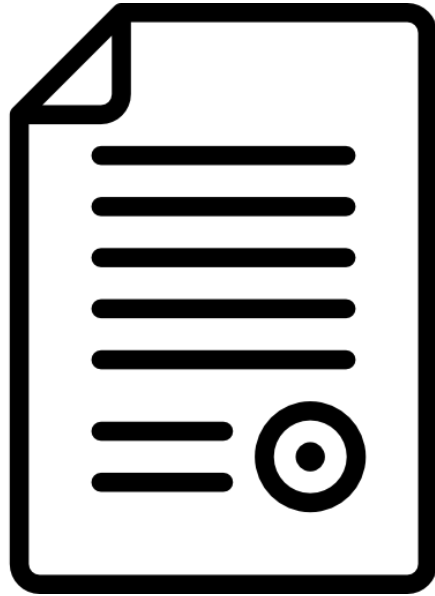
Any structured set of personal data which are accessible according to specific criteria, whether centralised, decentralised or dispersed on a functional or geographical basis.



GDPR & Personal Data

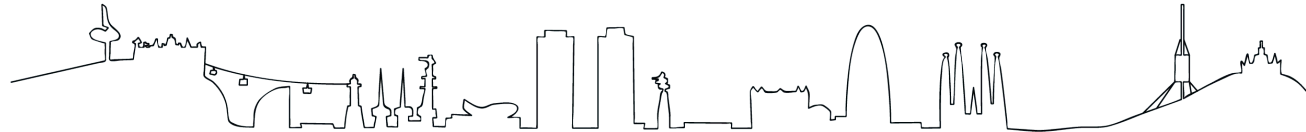


GDPR & Personal Data



Article 6

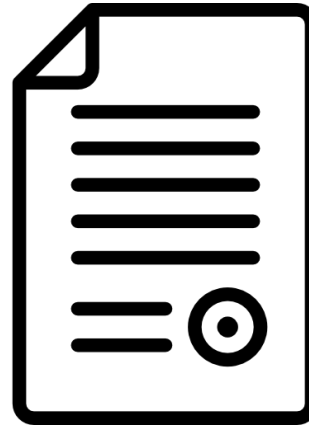
Lawfulness of Processing



GDPR & Personal Data

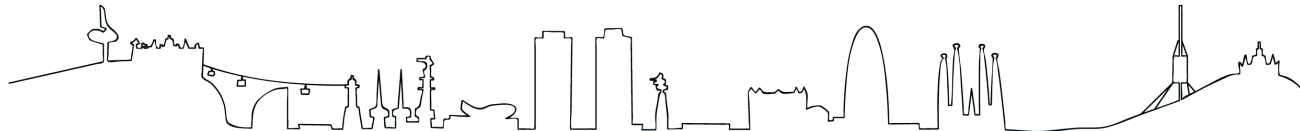
Requirements

1. Consent
2. A Contract
3. Vital Interests
4. Legal Obligation
5. A Public Task
6. Legitimate Interest



Article 6

Lawfulness of Processing

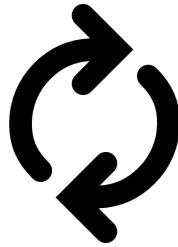


GDPR & Personal Data

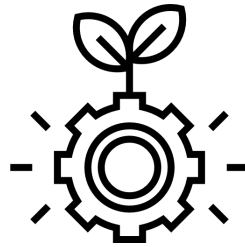
Ethical Legitimate Interest Framework



BENEFICIAL



PROGRESSIVE



SUSTAINABLE



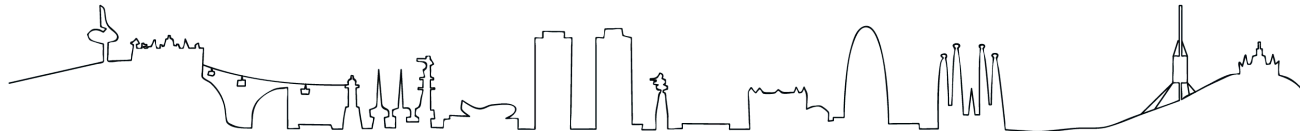
RESPECTFUL



FAIR

***Legitimate Interests and Integrated Risk and Benefits Assessment**

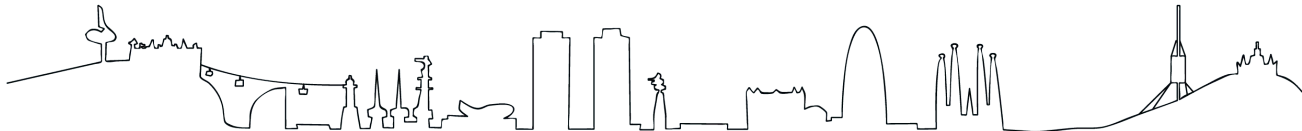
informationaccountability.org



GDPR & Personal Data

Principles

1. Purpose Limitations
2. Storage Limitations
3. Data Minimisation
4. Accuracy
5. Right to Erasure

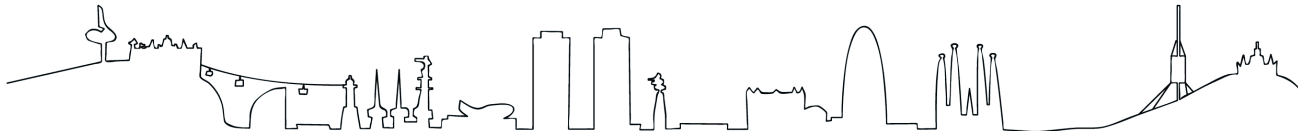


GDPR & Personal Data

The Right to Erasure

Individuals have a right to have personal data erased in specific circumstances:

1. It is **no longer necessary** in relation to the **purpose** for which it was originally collected/processed;
2. when the individual **withdraws consent**;
3. when the individual objects to the processing and there is **no overriding legitimate interest** for continuing the processing;
4. when the personal data was **unlawfully processed**;
5. when the personal data has to be erased in order to comply with a **legal obligation**; or
6. when the personal data is processed in relation to the offer of information society services to a **child**.

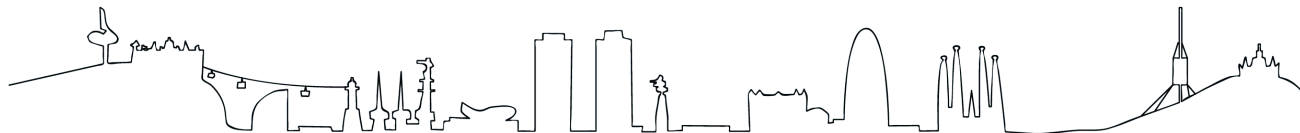
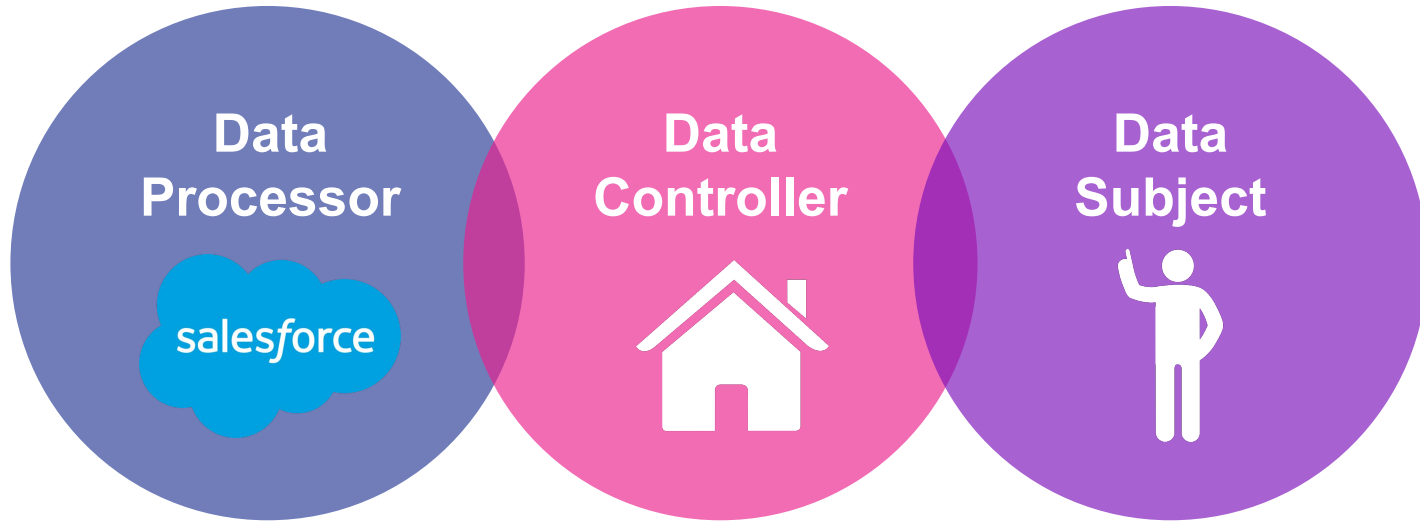


The Salesforce Approach

What are Salesforce doing to help?



The Salesforce Advantage

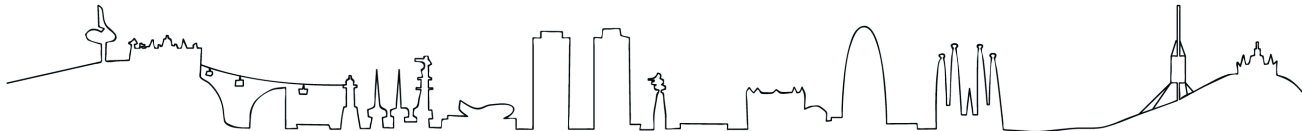


The Salesforce Advantage

Customer Relationship Management

This placeholder can hold text and below bullet points if required. You can also add charts, smartart or media.

- Monolithic approach to personal data
- Ability to trackback history
- Flexibility to cope with future changes

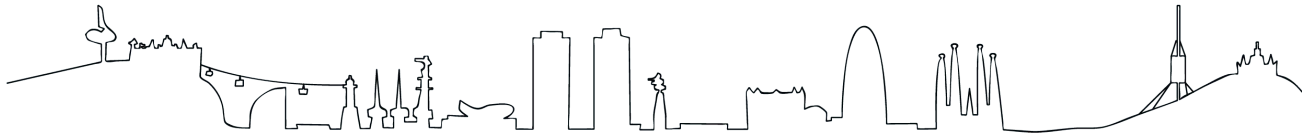


The Salesforce Advantage

Salesforce as a Data Processor

A data processor has three key responsibilities

- Keeping themselves compliant
- Enabling their product
- Educating their customers





The Salesforce Advantage

Trailhead & Docs!

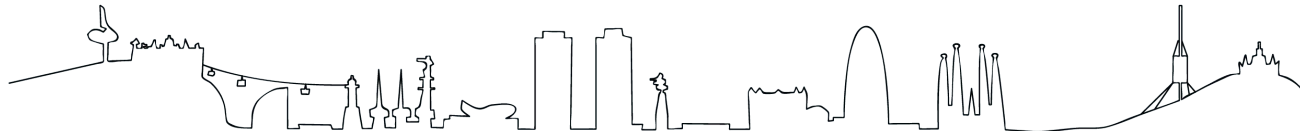


Module
European Union Privacy Law Basics
Learn about the General Data Protection Regulation (GDPR) and how to comply.
45 mins

Business User Beginner  

Data Processing Addendum

<http://bit.ly/DPAddendum>

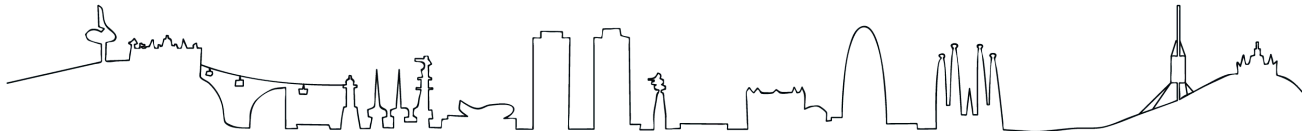


The Salesforce Advantage

Platform Changes

Salesforce have made changes to their platform to aid compliance

- The Individual Object... more on that shortly!
- Internal Logging
- Apex Method for User Deletion & more to come



The Individual Object

How does it work?

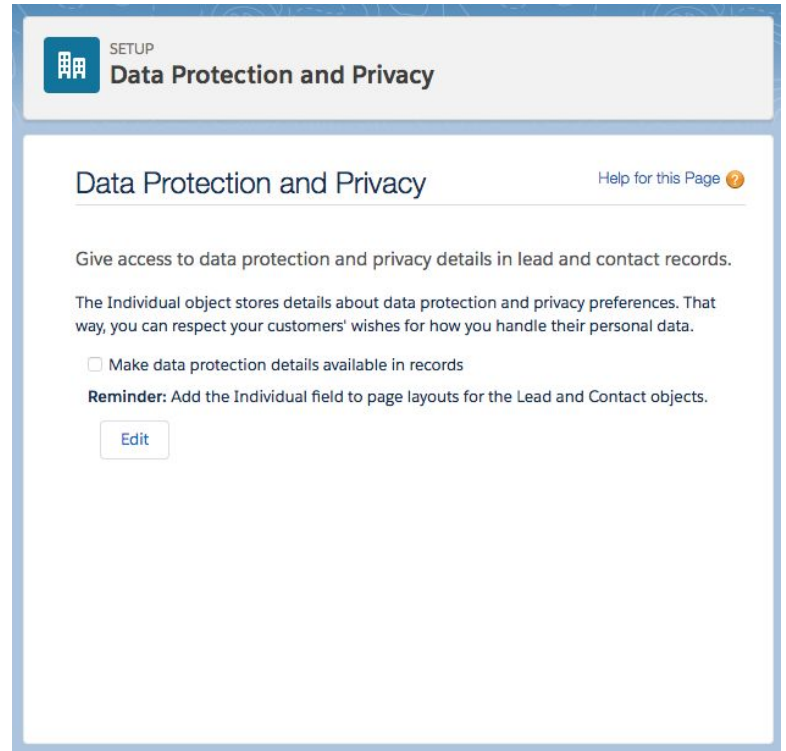


The Individual Object

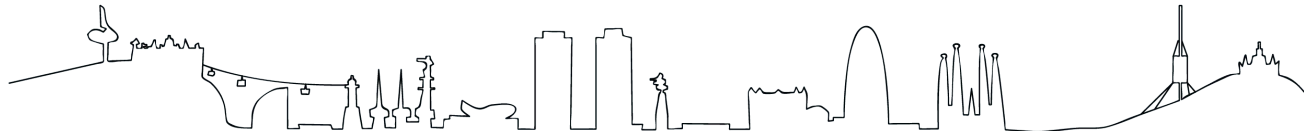
The Individual Object

A New Standard Object!

- Must be Enabled
- No Storage Limits
- Related to Contact, Lead, Person Account, & User* by Default



The screenshot shows the 'Data Protection and Privacy' setup page in Salesforce. At the top, there is a 'SETUP' icon and the title 'Data Protection and Privacy'. Below the title, there is a 'Help for this Page' link. The main content area contains the following text: 'Give access to data protection and privacy details in lead and contact records.' followed by 'The Individual object stores details about data protection and privacy preferences. That way, you can respect your customers' wishes for how you handle their personal data.' There is a checkbox labeled 'Make data protection details available in records' which is currently unchecked. Below this, there is a 'Reminder: Add the Individual field to page layouts for the Lead and Contact objects.' and an 'Edit' button.

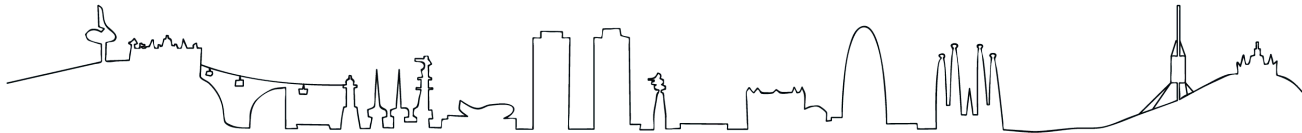


The Individual Object

System of Record

Salesforce have provide us with a method of “tracking” **high level** data privacy preferences;

- Don't Process
- Don't Market
- Export Individual's Data
- Ok to Store PII Elsewhere
- Block Geolocation Tracking
- Don't Profile
- Don't Track
- Forget this Individual

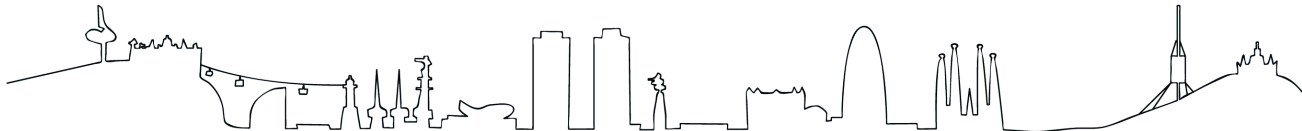


The Individual Object

Limitations

- No Backfill of Records
- Must Create Record Manually & very difficult to create in Classic
- No Declarative Tools - Except flow!*
- No Lightning Page Layouts

*Spring '18

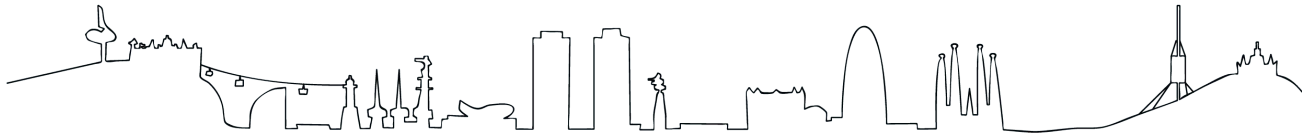
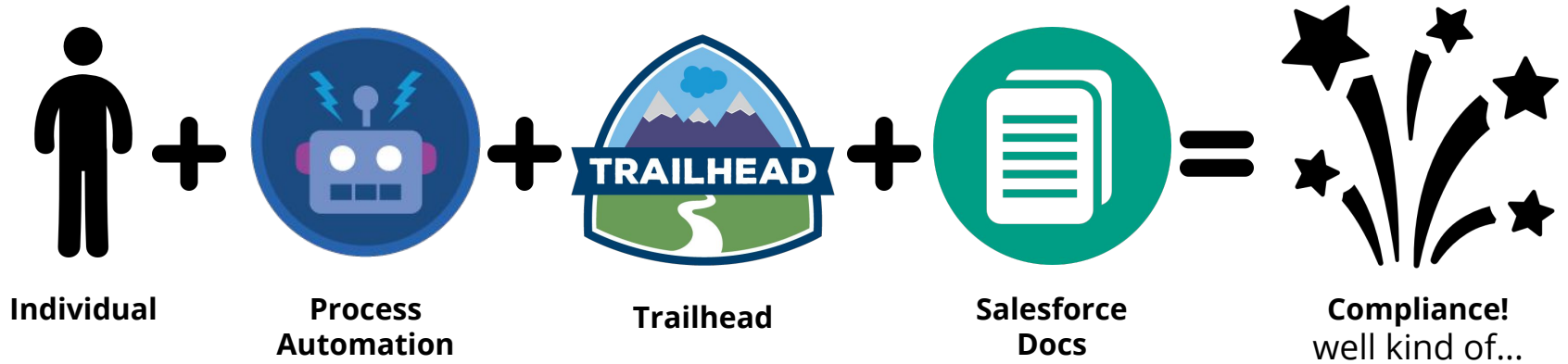


Key Takeaways

What is next...



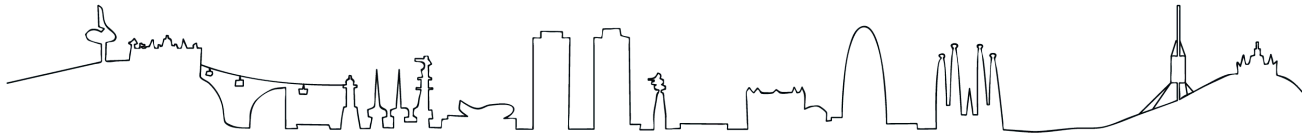
Key Takeaways



Key Takeaways

What you need to do

1. Document your org
2. Understand & maintain your data landscape
3. Be ready for requests
4. Don't Panic!



DEMO!

What COULD compliance look like?
Feat. Elements.Cloud Data Privacy App



The Problem:

**We must rethink the way we
act with personal data AND
think with personal data**

Q & A



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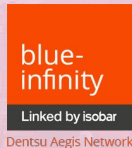
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