



WORK.COM + Cloud Compliance

The COVID-19 Data Privacy Playbook

A Guide for How to bring
Data Privacy to Work.com

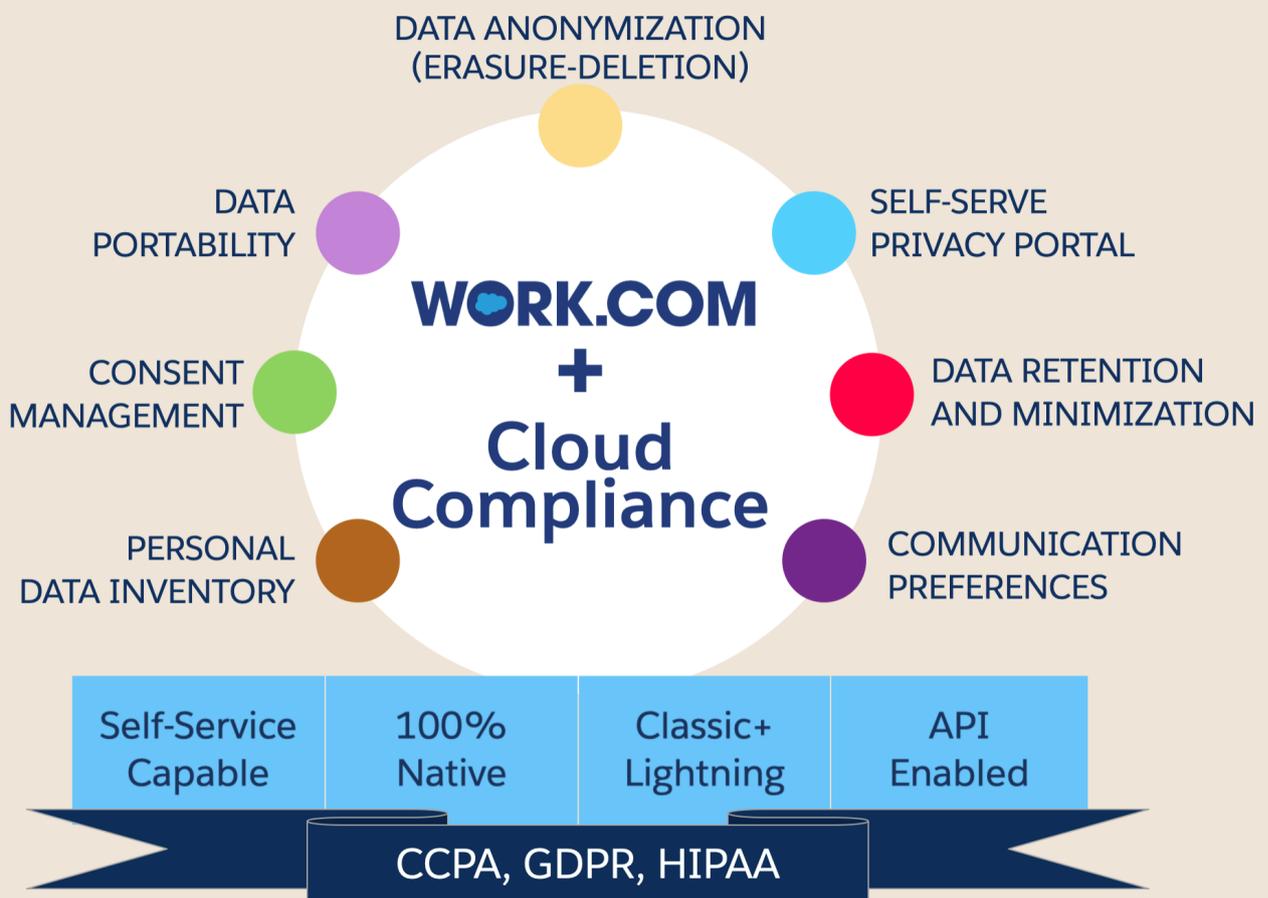
Find us on AppExchange: bit.ly/dataprivacyapp

info@PlumCloudLabs.com | www.PlumCloudLabs.com | +1 (347) 766 4758

REOPENING WITH WORK.COM

SPONSORED BY: CLOUD COMPLIANCE

The most comprehensive Salesforce data privacy platform
for Work.com



OUR PARTNERS



Find us on AppExchange: bit.ly/dataprivacyapp

info@PlumCloudLabs.com | www.PlumCloudLabs.com | +1 (347) 766 4758

CONTENT

- 04 Voices of the new normal
- 05 Why data privacy for Work.com?
- 06 What's a good data privacy solution?
- 07 Re-opening: The new onboarding
- 08 Inform
- 09 Ask consent
- 10 Get preferences
- 11 Enable self-serve
- 12 Comply
- 13 Comply Contd.
- 14 Common data privacy use cases
- 15 Which objects have personal data?
- 16 Customers ♥ Cloud Compliance

Find us on AppExchange: bit.ly/dataprivacyapp

info@PlumCloudLabs.com | www.PlumCloudLabs.com | +1 (347) 766 4758

Voices of the new normal

Employees-Customers

Challenge

Trust in the new normal



"I am not sure if I should provide my personal information?"

"How can we help everyone understand that we value their privacy?"



Human Resources

Challenge

Driving transparency

Legal/DPO

Challenge

Staying compliant with Privacy laws



"So much personal data! How can I ensure compliance with GDPR, CCPA, HIPAA and others?"

"How can I build Salesforce features for communication preference, consent, privacy rights and data masking?"



Salesforce Team/IT

Challenge

Address a completely new set of requirements

CISO/Data Security

Challenge

Disposal of sensitive data



"How do we safely manage, prevent breaches and eventually dispose all this sensitive data?"

Why data privacy for Work.com?

Work.com paves the way for organizations to re-open safely and quickly. However, as we collect ever-more sensitive data, comprehensive data privacy and security controls are critical

Some of the considerations for implementing robust data privacy are...



Contact tracing and personal data

- Work.com facilitates contact tracing thus storing sensitive health and location data of employees, visitors, customers, families etc.



Mental wellness and health data

- Organizations are gearing up to frequently capture mental and physical health data, thus creating data retention challenges



GDPR, CCPA, HIPAA...

- Data privacy laws require organizations to implement robust privacy controls for authorization/consent, data retention and privacy requests (DSARs)

What's a good data privacy solution?

Understanding privacy requirements and implementing a solution for Work.com needs specialized knowledge that can be difficult during these times.

Some of the considerations for a good data privacy solution are...



Quick, lightweight and pragmatic

- Deploy in days/weeks
- Pre-built data privacy and protection processes
- More declarative/configuration driven



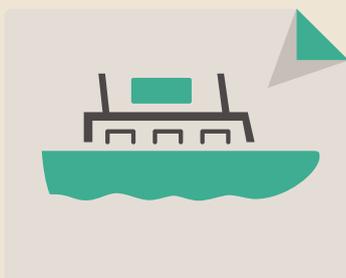
Comprehensive compliance that scales

- Manage end-to-end compliance flows
- Use Salesforce's standard data privacy objects
- Integrate consent-based Marketing/data processing



Flexibility to meet evolving requirements

- Data driven to manage changes easily
- REST, APEX & Invocable for different use cases



Keep data on board in Salesforce

- 100% native - your data never leaves Salesforce

The new onboarding

INFORM

IN SIMPLE TERMS, EXPLAIN HOW PERSONAL DATA IS USED, USE FAQs, PREFERABLY IN MULTIPLE LANGUAGES



ASK CONSENT

INTEGRATE AUTHORIZATION AND CONSENTS IN AN AUDIT-READY MECHANISM WITHIN WORK.COM



GET PREFERENCES

ASK HOW EMPLOYEES/CUSTOMERS WOULD LIKE TO BE COMMUNICATED FOR VARIOUS TYPES OF INFORMATION



ENABLE SELF-SERVE

OFFER A PRIVACY PORTAL TO MANAGE PREFERENCE, CONSENT & PRIVACY RIGHTS



COMPLY

AUTOMATE PRIVACY PROCESS COMPLIANCE FOR HIPAA, GDPR, CCPA AND OTHERS



INFORM

Transparent communication → Builds trust

Explain in plain language, how your organization ensures privacy and security of personal, healthcare and any COVID-specific data

Work.com with Cloud Compliance's pre-built privacy portal can easily show privacy statements, terms & conditions, FAQs etc for different audience and purposes



**STEP
01**

Best practices enabled by Cloud Compliance

SELF SERVE PRIVACY PORTAL

Enables Data Subjects to exercise their rights with automated verification

MULTI-LINGUAL / MEDIA SUPPORT

Generate multi-lingual & Video based regional Privacy terms (T&C) etc directly from Salesforce



ASK CONSENT

Request permission → Stay compliant

Integrate Authorization and Consent record-keeping for CCPA, GDPR, HIPAA and emerging COVID specific compliance and audit requirements

Automate and enforce due process with Cloud Compliance's native support for Work.com's data privacy model including Authorization, Consent & Individual objects



Best practices enabled by Cloud Compliance

AUTO-CREATE 'INDIVIDUAL'
Auto-generates individual, matches & links to Contact, Lead, User & Person-Account

MANAGE CONSENT
Granular, audit-ready preferences by channel and purpose to stay compliant and prevent fines



GET PREFERENCES

Right channel + purpose → Customer ❤️

Maintain communication preferences for specific purposes and channels and apply across call center users, Marketing apps and other processes

Fully manage and respect customer and employee preferences in Work.com with Cloud Compliance - integrates with Marketing Cloud, Pardot and others



Best practices enabled by Cloud Compliance

AUTO-CREATE 'INDIVIDUAL'
Auto-generates individual, matches & links to Contact, Lead, User & Person-Account

INTEGRATED MAR-TECH
Integrates Marketing Cloud, Pardot, Marketo, MailChimp etc for permission based marketing



ENABLE SELF-SERVE

Easier privacy control → Improves adoption

Put customers and employees in control of their information's privacy, consent, and related data privacy rights

Integrate Work.com data with Cloud Compliance's self-service portal for data portability, RTBF, consent and preference management etc



**STEP
04**

Best practices enabled by Cloud Compliance

SELF-SERVE PREFERENCE CENTER
Self-serve for consent & customer preferences.
Works with free Communities version also

FULL DSAR LIFECYCLE
Manages Right to access, restrict processing, rectification and others

MANAGE CONSENT
Granular, audit-ready preferences by channel and purpose to stay compliant and prevent fines



COMPLY

Enforce compliance → Prevent fines

Ensure end-to-end compliance with data privacy laws such as GDPR, CCPA, HIPAA is crucial for highly sensitive health, COVID and other data

Automate privacy request and DSAR submission and process Work.com data with Cloud Compliance to reduce manual effort and streamline



Best practices enabled by Cloud Compliance

FULL DSAR LIFECYCLE

Manages Right to access, restrict processing, rectification and others

2-CLICK DELETION/ERASURE

Easily finds personal data across objects.
Removes or anonymizes data, field history & files

DATA INVENTORY

Documents & tracks PII fields - purpose, owner, shared with, retention period etc

AUTOMATE DATA PORTABILITY

Generates PDF/Excel/JSON data as defined by DPO/others & include terms/branding



COMPLY continued...

Enforce compliance → Prevent fines

See an overview of requests in process, remove unneeded data with data retention & minimization, and address other privacy requirements



**STEP
05**

Best practices enabled by Cloud Compliance

DPO DSAR DASHBOARD

Provides a full view of DSARs, and easily see requests that are at risk of violation



SANDBOX DATA MASKING

Prevents personal data breach by automated Sandbox data anonymization and erasure



DATA MINIMIZATION

Reduces data breach liability and automatically deleting personal data based on business rules



MANAGE LEGAL HOLDS

Prevent data from automated removal with easy to configure exception rules for legal holds



POLICY BASED ANONYMIZATION

Enforces data anonymization policy to de-identify data on expiration of legal basis

Common data privacy use cases

	DECLARATIVE	APEX	API
<p>We need to document our personal data processes - Data Inventory</p> <p>Automated inventory of PII fields/objects and easily update for changes in the Org</p> <p>Support for managing inventory of third party / external data</p>	● ●	●	●
<p>My legal/DPO needs auditable consent & Marketing wants a Preference center - Consent Management</p> <p>End to end Consent lifecycle with self-service and full audit trail of opt-in/opt-out</p> <p>Marketing Cloud, Pardot, Marketo etc with integrated self-serve preference center</p>	● ●	●	● ●
<p>Our customers/consumers are asking for their Personal Data - Data Portability</p> <p>Compile PDF, Excel or JSON data across multiple objects</p> <p>Customize Portability document with branding/notes and data labels</p>	● ●	●	●
<p>Our customers/consumers want their data to be removed - Data Erasure (RTBF/Deletion)</p> <p>Remove or anonymize records, field history & files</p> <p>Securely support proof of de-identification</p>	● ●	● ●	● ●
<p>My legal/DPO wants us to get rid of unnecessary personal data - Data Retention</p> <p>Scheduled policy-based anonymization</p> <p>'On Hold' sensitive record retention for regulated industries</p>	● ●	●	●
<p>My business has to show different privacy terms for different regions/languages - Privacy Micro-sites</p> <p>Generate multi-lingual & regional Privacy terms (T&C) directly from Salesforce</p> <p>Store T&C proof of acceptance</p>	● ●	●	●
<p>I want to prevent personal data breach by removing PII from Dev Orgs - Sandbox Anonymization / Data Masking</p> <p>Automated object specific data masked / erased on sandbox create and refresh</p>		●	

Which objects have personal data?

Here is a list of Work.com objects that may contain personal data. Cloud Compliance can manage all aspects of data privacy requirements for Work.com, Health Cloud and Service Cloud etc

OBJECTS	DE-IDENTIFICATION		CONSENT	
	PORTABILITY		RETENTION	
Contact	●	●	●	●
Crisis	●			
Employee	●	●	●	●
Employee Crisis Assessment	●			
Individual	●	●	●	●
Location		●	●	●
Location Wellness Fact			●	
Survey Objects	●	●	●	●
User	●	●	●	●

Customers ♥ Cloud Compliance

100

100% native app makes 'End-to-end' data privacy easy



Comply Faster - With Free demo, trial and deploy!



Reduce costs with generous features, support and guarantee



Bring innovation home several times a year with new release

Become the privacy champion and let your company be worry free

Schedule a free assessment
www.calendly.com/plumcloudlabs

NRC

Non Profit | GDPR | Norway

NRC integrates its custom portal and Salesforce via APIs for Consent & Communication Preferences

Deloitte.

Consulting Services | GDPR | UK

Deloitte handles Data Minimization and Erasure / RTBF in Salesforce and Anonymizes Personal data



HigherEd | GDPR | UK

EF Education First, a global giant syncs consent and communication preferences between Salesforce and Pardot, and their AWS virtual schools with APIs

FLOOR & DECOR

Retail | CCPA | USA

Large Retailer from US integrates their Data deletion & portability between OneTrust and Salesforce with REST APIs

Find us on AppExchange: bit.ly/dataprivacyapp

info@PlumCloudLabs.com | www.PlumCloudLabs.com | +1 (347) 766 4758