

# PRIVACY POLICY GDPR

The GDPR will come into force on 25 May 2018. Businesses have to be compliant by that date. PAIL® Solicitors understands that a review of clients business administrative processes and sales and marketing strategies are required in order to ensure that all activity is compliant with GDPR and the risk of continuing with sales processes that may be in violation of GDPR is minimised. We recommend a three phased approach. The first is for preparation in relation to the specific subject matter. During this time, clients can make available any initial documents to aid in this process or PS can personally attend on clients. Phase two involves examining in detail client's data protection related processes followed by producing a report as well as policies, terms and conditions and template notifications. Phase three is after delivery care to answer any queries still not clarified or address any new issues as a result of the works delivered. For more information visit our website.



## SUGGESTED SCOPE OF REVIEW

- Website and telephone marketing /promotional materials (including material provided to customers, sales-team and any third party brokers)
- Customer documentation
- All relevant policies / processes /procedures – including any relevant data protection escalations process
- Relevant staff training materials
- Risk controls currently in place, including any ongoing monitoring controls
- Adequacy of recording and reporting of relevant information – including any relevant client
- Ability to identify previously rejected /problem clients
- Lawful processing condition (review & recommendation)
- Any specific scenarios as required – e.g. vulnerable customers
- Follow up compliance recommendations

	PREPARATION	DELIVERY	POST- DELIVERY
Est Cost	Not Charagable	5 to 40 Hours*	1 to 10 Hours*
PS Deliverables	<ul style="list-style-type: none"> <li>• PS revision of all process documentation, pre and post sales training manuals.</li> <li>• Optional onsite visit to complete process/meet with Team members</li> </ul>	<ul style="list-style-type: none"> <li>• Review of all relevant documentation /processes / current controls</li> <li>• Review of current policies/T&amp;Cs</li> <li>• Deliver compliant documentation, advice, policies</li> </ul>	<p>Respond to any follow up queries from client including:</p> <ul style="list-style-type: none"> <li>• Final documentation and advice delivered</li> <li>• Gaps identified</li> <li>• Recommendations</li> <li>• Next steps</li> </ul>
Client Input	<ul style="list-style-type: none"> <li>• Provision of initial docs/optional on-site meeting with client, Head of Compliance etc</li> </ul>	<ul style="list-style-type: none"> <li>• Provision of all relevant documents, materials, etc</li> <li>• Access to relevant systems</li> <li>• Time with relevant team members</li> <li>• Access to sample of case files (selected by PS for independent legal opinion (optional)</li> </ul>	

\*Excluding VAT. Estimated cost in relation to this proposal is based on hourly rate of £250. Travel time is charged at 100% of hourly rate if short visit for unproductive time. Where a 3rd party resource is used to complete any activities this will be charged at cost. Time required is estimated - subject to review at each stage and for each client based on what is required. The minimum approximate price is £1,250. Delivery estimate 7 days or less.

**THIS FIRM IS REGULATED BY THE SOLICITORS REGULATION AUTHORITY**  
And is recorded on the Solicitors Regulation Authority database with reference number 511025. VAT: 946 8358 72.