



Applying Data Privacy in a Global Company

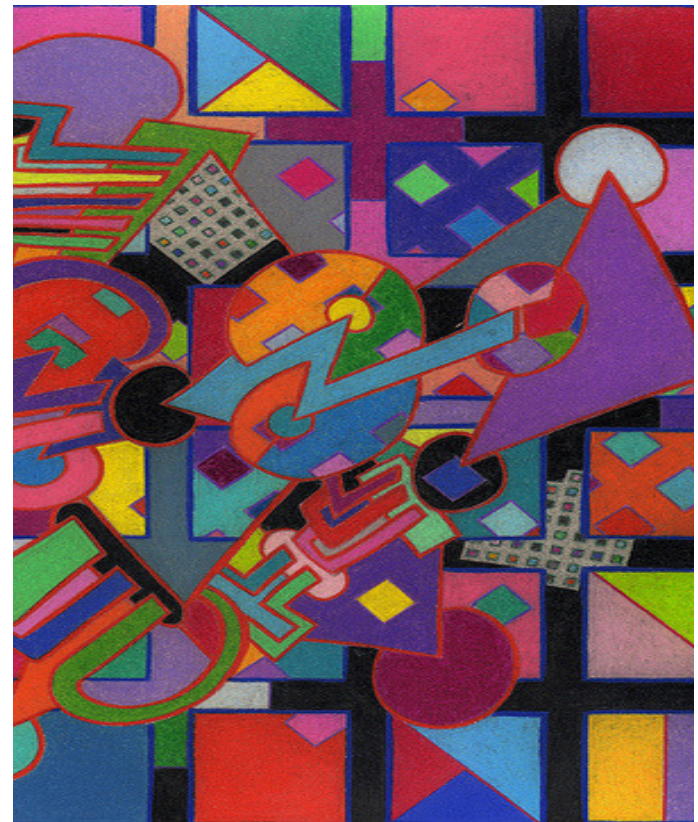
Executive Review

January 13, 2011

ISACA North Texas Chapter Meeting



- Company Background
- Privacy Environment
- Our Privacy Approach



Setting the Stage

To be the global leader in permission based digital data collection and reporting to power insight

- Operate in over 38 countries from all regions and demographics
- Enrolled over 6 million members that take surveys
- Conduct over 500 surveys each week
- Send out over 8 million emails per week
- Manage 4 terabytes of member data with over 10 terabytes of indexes

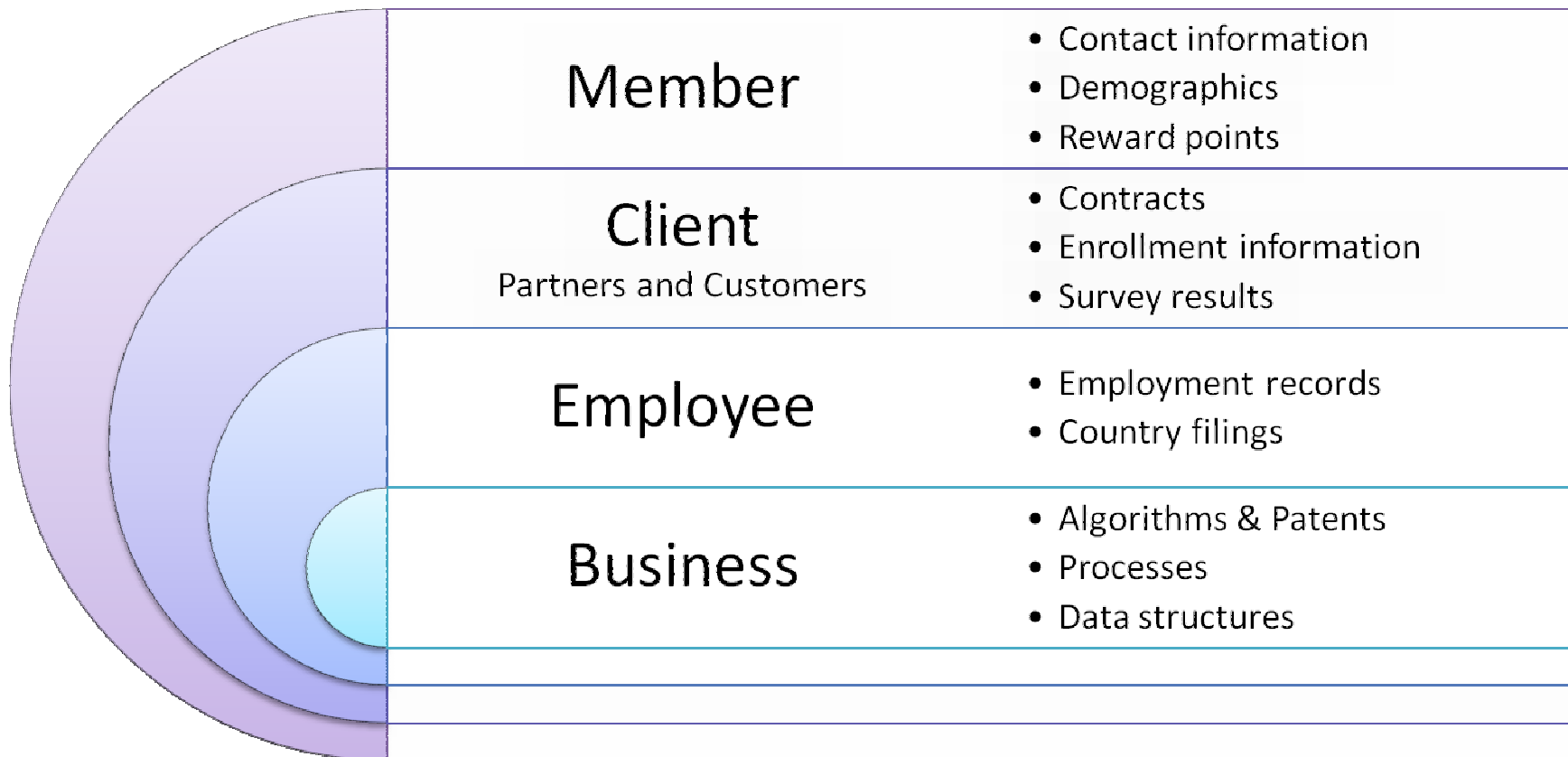


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Identifying the Props

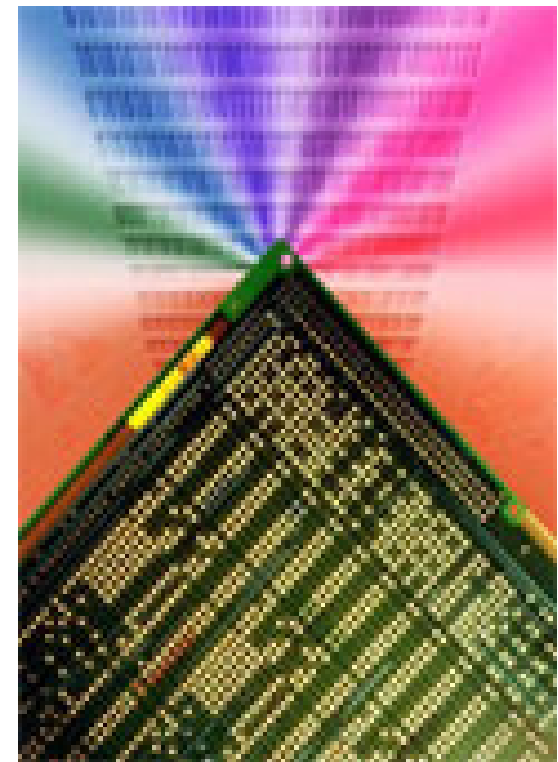


Privacy Environment

Data Privacy is the assurance that sensitive information is protected from unauthorized use or access.

Individuals have the right to control information about themselves

- Over 500 laws
- Numerous standards
- Dependent processes



Stage Fright

Which approach is “Industry Best Practice”?

- **Perimeter approach** – implement technologies that prevent data from leaving the company
- **Access approach** – restrict access to the fewest number of individuals as possible based on “need-to-know”
- **Data abstraction approach** – only allow access through an abstract of the data which masks all of the sensitive data. Data warehouse technologies provide controls while satisfying business needs
- **Process approach** – control the information during the workflow
- **Encryption approach** – encrypt all data and transmission to ensure the data is not readable

The Production

Set the focus

Categorized the restrictions

Find a way to manage the complex external conditions

Laws and Regulation Categories

- Information Protection
- Financial Reporting
- Safe Harbor
- Children online Privacy
- Spam Laws
- Privacy Rights
- Notification
- Spyware
- Data Transmission
- Search and Seizure
- Technology Import / Export
- Information Retention and Destruction
- Outsourcing
- Employment

Country Impact

- US
- Canada
- UK
- EU
- Greece
- Brazil

International Directives

- OECD Guidelines on the Protection of Privacy and Transborder Flows of Personal Data – “human rights” of information
- Wassenaar Arrangement - export

Define the Business Risk

Paving the Road

Our Vision

“To be the global leader in permission based digital data collection and reporting to power insight.”

Big Rocks and potential potholes

- While Quote to Bill projects have (or will soon) harmonize sales and project management activities the underlying Operational Platforms remain separate and distinct (Efficiency, Quality)
- Quality Measures Differ As Function of Panel System (Quality)
- Different Data Warehouse Architectures Support Operational Systems, **no VOP data warehouse** (Efficiency)
- Difficult to Deploy **Panel Management Initiatives** (Retention/Activation)
 - Incentive/Reward Management
 - Test activation strategies
 - Panellist experience changes
- Issues With Management of Panel Profiling (Quality)
 - VOP profile surveys are hand-coded by IT; branched surveys are unusually challenging to deploy
 - ERI attribute structure presents challenges (no Parent-Child relationships)
 - Categorization
 - Manual archiving and updates
- Legal, Contractual, **Privacy** and Compliance Risks

Paving the Road (cont'd)

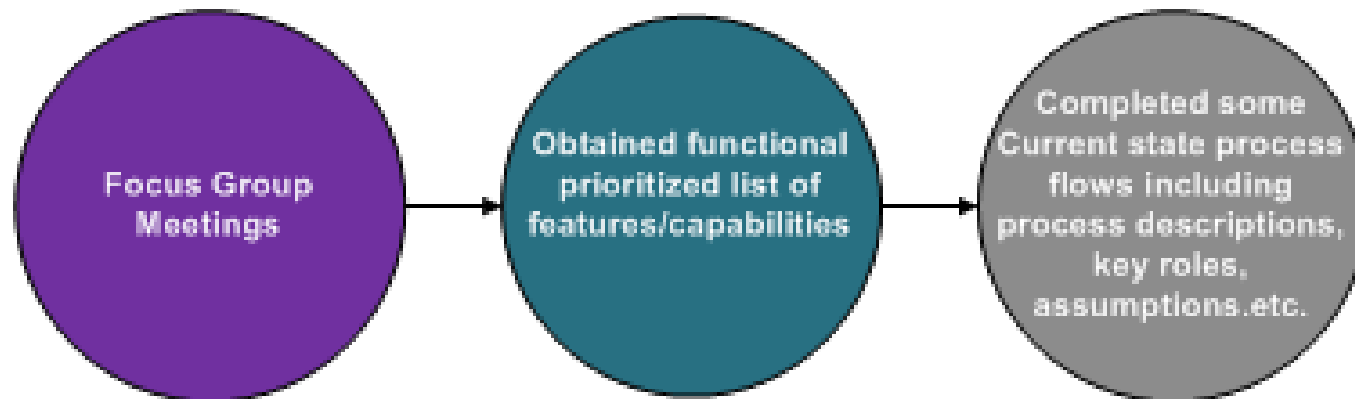
Big Rocks and potential potholes

- Different Operational Tools Across Panels
 - Highly complex processes for multi-panel projects
 - Prevents project sharing which inhibits collaborative project management across panels and timezones
 - Increases training requirements
 - Does not support company value: “Work together as one team”
- Content Management Practices Vary Across Panels
- Manual processes across business functions requires significant reliance on IT/Technology
 - Lack of agility & flexibility result in slow launch, project cycle times, and mechanical tasks
 - Cannot respond quickly to new opportunities (e.g. adding new partners quickly)
 - Limited ability to customize Panellist experience
- Lack of consistent access to data results in delayed reaction to issues
 - Insufficient reporting (panel recruitment, panel experience, fieldwork)
 - Inconvenient to get at the data, particularly for VOP
 - No early warning system
 - No cross-sharing of knowledge

Conceptualization

Phase Zero

This was the conceptualization phase for the project. It began in June 2010 with the goal of completing brainstorming sessions (focus group meetings) to compile a list of functionally prioritized objectives and features for the new enterprise system.



Over 20 focus group meetings held & many 1:1 meetings

Over 60 employees participated

- Panel Experience
- Reward Management
- Incentive Management
- Panel Recruitment
- Panel Support/Member Services
- Panel Profiling
- Enterprise Router
- Operations and QTB Interfaces
- BI Reporting – Operations
- BI Reporting – Finance
- Technology
- Sales/Client Development (TBD)

EPS Vision

Support Research Now panels so that they can be accessed, managed and sampled using common business processes, while allowing the brands to remain unique. EPS encompasses the member experience, user tools and reporting to support the member experience and employees. A data driven approach should underpin EPS to increase efficiency and effectiveness. It should interface with other Research Now business systems.

Panellist Experience

- More engaging and relevant
- Rewarding
- Improved support

User tools

- Common tools for all functions
- Automation
- Increase function autonomy

Reporting

- Early warning alerts
- Robust BI
- Drives panellist experience

Panel Recruitment

Panel Experience

Incentive Management

Reward Management

Panel Profiling

Member Services

Fieldwork - router & sampling

Objectives & principles

Build a single enterprise panel management system that:

- Accommodates open and sponsor recruitment streams
- Enables advanced sampling (e.g. blending)
- Provides ability to create profiling and screening surveys without IT involvement
- Leverages one content management solution for all panels
- Improves the member experience through engaging and dynamic content
- Tracks Member interactions and shares this data with the panel management system
- Increases efficiency and effectiveness through a data driven approach
 - Auto-expire surveys
 - Auto-archive attributes (Parent-Child attribute maintenance)
 - Early warning notifications
 - Better/more accurate sample projections
- Interfaces with applicable business systems and functions
- Is agile and flexible

- Effective - Increase conversion rate at recruitment, maximise activation and retention
- Automated - Reduces manual processes and drives efficiency, enabling employees to spend more time on areas where they can 'add value' (e.g. client consultation, panel retention strategy or social media strategy)
- Flexible/agile – Easy to change/adaptable and incorporate new panels, social media sample, third party/vendor sample and client lists.
- Customization - Make relevant to members & personalise experience
- Self-sufficient – Reduce reliance on technology/IT, empower panel teams to free IT time to focus on future feature development
- Communication – Be open with members about practices, policies & procedures
- Accurate – Improve precision and reduce errors. This creates more time for Project Managers to think (add value) and build customer relations due to reduction in 'busy time' maintenance work.
- Follow Professional Standards – Adhere to market research standards without requiring individuals to know them worldwide.

What are the most important outcomes?

New system should do what we do today consistently well, regardless of panel or geography

- Support enrollment models

- Deliver panelists to surveys in a consistent, repeatable, accurate manner; credit panelists for survey participation; provide a mechanism to manage respondent quality (e.g. Veracity360)

- Codify operational best practices while allowing room to maneuver as “custom” needs arise

Raise our game

- Improve cycle times for “pressure point” areas

 - Recruitment setups

 - Project launch to field

 - Web site content changes (content management system)

- Facilitate advanced sampling (e.g. blending)

- Reduce manual processes and drive efficiency, freeing staff to spend more time on areas where they can add value

- Facilitate increased effectiveness and efficiency through a data driven approach

 - Warehouse data for all panels (enable access, reporting, analysis)

 - Project-level exception reporting (early warning notifications, effective discounting, etc.)

 - Ad hoc data mining and analysis

- Improved routing technology – better utilize panellists who want to take a survey

- Improve the member experience through engaging and dynamic content

 - Test / measure / refine / retest

- Manage panelist lifecycle

 - Enrollment yield

 - Activation

 - Retention

Considerations

➤ Build New System

- System needs to be substantially complete before it can be deployed; lots of moving pieces and associated tools
- Benefits to the Org delayed until deployment

➤ Choose Existing System As Base And Refactor

- Has the potential to deliver value earlier
- How to prevent feature creep or paving cowpaths?

➤ Quick Wins

- Regardless of the approach, how does this project effort produce 'quick wins'?

➤ Company Goal

- To create 'one team' that feels passionate about our success – one team – one set of tools – one system

