

# Data protection and contact process FAQs

## What do I do if someone asks me to unsubscribe their whole organisation?

### ► Prospecting

A contact is within their rights to opt out/unsubscribe all contacts within their organisation. If you are asked to do this, you must action it. You can either do this on behalf of the customer (please see Marketing Opt-Out Flow), or share the unsubscribe link with the contact:

[www.phoenixs.co.uk/unsubscribe](http://www.phoenixs.co.uk/unsubscribe)

[www.licensedashboard.com/unsubscribe](http://www.licensedashboard.com/unsubscribe)

### ► Account management

A contact is within their rights to opt out/unsubscribe all contacts within their organisation.

#### However, if:

- You have a close working relationship with the account
- They are a current customer
- The unsubscribe seems unprompted
- The request was instructed from a more junior team member

Then check with a senior contact that they are authorised to make this decision on behalf of the whole organisation.

Until the above has been resolved, you must unsubscribe the individual. You can either do this on behalf of the customer (please see Marketing Opt-Out Flow), or share the unsubscribe link with the contact:

[www.phoenixs.co.uk/unsubscribe](http://www.phoenixs.co.uk/unsubscribe)

[www.licensedashboard.com/unsubscribe](http://www.licensedashboard.com/unsubscribe)

If the senior contact advises that the whole organisation does not need unsubscribing, confirm this in an email to the customer so that we have an audit trail. A copy of this email should then be saved onto SPOL in the relevant customer folder.

If the senior contact advises that the whole organisation needs unsubscribing, then please email:

[gdpr@phoenixs.co.uk](mailto:gdpr@phoenixs.co.uk) and

[marketing@phoenixs.co.uk](mailto:marketing@phoenixs.co.uk) to action rather than opting all contacts out manually.

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## If a contact unsubscribes, do I need to unsubscribe all contacts within that organisation?

No: unless the contact specifically asks for the whole organisation to be unsubscribed, you don't need to unsubscribe all contacts within the account.

To unsubscribe a contact, you can either do this on behalf of the customer (please see Marketing Opt-Out Flow), or share the unsubscribe link with the contact:

[www.phoenixs.co.uk/unsubscribe](http://www.phoenixs.co.uk/unsubscribe)

[www.licensedashboard.com/unsubscribe](http://www.licensedashboard.com/unsubscribe)

If the contact requests for the entire organisation to be opted out (and has the authority with the organisation to do so - C-level etc.) then please email:

[gdpr@phoenixs.co.uk](mailto:gdpr@phoenixs.co.uk) and

[marketing@phoenixs.co.uk](mailto:marketing@phoenixs.co.uk) to action rather than opting all contacts out manually.

## **If a contact says, 'please do not contact me again', can I leave it a few weeks and try contacting them again as I may have just caught them at a bad time?**

The simple answer is no. If a customer says, 'please do not contact me again' or 'please can I opt out', you must unsubscribe them.

You can either do this on behalf of the customer (please see Marketing Opt-Out Flow), or share the unsubscribe link with the contact:

[www.phoenixs.co.uk/unsubscribe](http://www.phoenixs.co.uk/unsubscribe)

[www.licensedashboard.com/unsubscribe](http://www.licensedashboard.com/unsubscribe)

so they do not receive any promotional marketing material.

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## **If my contact has unsubscribed, can I still contact them (email, phone, Teams) about an existing agreement/ contract, renewal?**

Yes, providing you are reaching out to the contact to discuss an existing agreement, contract, or renewal this is an acceptable reason to make contact.

### **► Prospecting**

You must only discuss the contract, agreement, or renewal in question. If the customer asks to discuss wider topics that is fine, providing they have initiated the conversation. For traceability of you being asked by the customer to provide information via email or Teams, please state 'further to our conversation and as per your request...' in your written response.

## **If my contact has unsubscribed, can I contact them (email, phone, Teams) about new services, products, vendors etc?**

### **► Prospecting**

No – you must not contact a customer outside the parameters of their contract, agreement, or renewal.

### **► Account management**

Providing the contact is from an account that is a current customer and proactively buying, and you have a pre-existing and positively mutual relationship with the contact, then you can contact them regarding products or services that you think will be complementary to their current infrastructure.

If the contact is opted-out, but is receptive to your emails, you are able to ask them if they wish to opt back in to receive these communications from Phoenix by using the following copy:

**Always stay up-to-date. Re-join our marketing communications - [www.phoenixs.co.uk/subscribe](http://www.phoenixs.co.uk/subscribe)**

However, if the customer is not receptive to this kind of information, then you should stop contacting them regarding anything outside the parameters of their contract, agreement, or renewal.



## Opt out might sound like

*"please can I opt out?"*

*"please do not contact me"*

## Sales

## Erasure might sound like

*"please delete/ remove me from  
your systems/ databases"*

