

Sending direct marketing messages: At-a-glance guide

Method of communication	Individual consumers (plus sole traders and partnerships)	Business-to-business (companies and corporate bodies)
Live calls	<ul style="list-style-type: none"><input type="checkbox"/> Can opt-out<input type="checkbox"/> Screen against the Telephone Preference Service (TPS)<input type="checkbox"/> Screen against own 'do not call' lists<input type="checkbox"/> Consumer must have given caller specific consent to make marketing calls about claims management services<input type="checkbox"/> Pension schemes calls only if authorised and have consent or meet existing customer criteria<input type="checkbox"/> Caller must display telephone number<input type="checkbox"/> Caller must say who is calling and if requested give contact address or freephone number<input type="checkbox"/> If processing personal data must comply with UK GDPR eg ensure fair, lawful and transparent.	<ul style="list-style-type: none"><input type="checkbox"/> Can opt-out<input type="checkbox"/> Screen against the Corporate Telephone Preference Service (CTPS)<input type="checkbox"/> Screen against own 'do not call' lists<input type="checkbox"/> Consumer must have given caller specific consent to make marketing calls about claims management services<input type="checkbox"/> Pension schemes calls to employees only if authorised and have consent or meet existing customer criteria<input type="checkbox"/> Caller must display telephone number<input type="checkbox"/> Caller must say who is calling and if requested give contact address or freephone number<input type="checkbox"/> If processing personal data must comply with UK GDPR eg ensure fair, lawful and transparent.
Automated calls	<ul style="list-style-type: none"><input type="checkbox"/> Consumer must have given caller specific consent to make recorded marketing calls.<input type="checkbox"/> Caller must display number<input type="checkbox"/> Must include the caller's name and a contact address or freephone number<input type="checkbox"/> If processing personal data must comply with UK GDPR eg ensure fair, lawful and transparent.	<ul style="list-style-type: none"><input type="checkbox"/> Consumer must have given caller specific consent to make recorded marketing calls.<input type="checkbox"/> Caller must display number<input type="checkbox"/> Must include the caller's name and a contact address or freephone number<input type="checkbox"/> If processing personal data must comply with UK GDPR eg ensure fair, lawful and transparent.

Electronic mail (eg emails or texts)	<ul style="list-style-type: none"> <input type="checkbox"/> Consumer must have given sender specific consent to send marketing emails/texts. <input type="checkbox"/> Or soft opt-in (previous customer, our own similar product, had a chance to opt out) <input type="checkbox"/> Sender must not disguise or conceal identity <input type="checkbox"/> Sender must give a valid contact address for consumer to opt-out <input type="checkbox"/> If processing personal data must comply with UK GDPR eg ensure fair, lawful and transparent. 	<ul style="list-style-type: none"> <input type="checkbox"/> Can email or text corporate bodies <input type="checkbox"/> Good practice to comply with opt-out <input type="checkbox"/> Individual employees can opt-out <input type="checkbox"/> Sender must not disguise or conceal identity <input type="checkbox"/> Sender must give a valid contact address for opt-outs <input type="checkbox"/> If processing personal data must comply with UK GDPR eg ensure fair, lawful and transparent.
Faxes	<ul style="list-style-type: none"> <input type="checkbox"/> Consumer must have given sender specific consent to send marketing faxes <input type="checkbox"/> Must include the senders name and a contact address or freephone number <input type="checkbox"/> If processing personal data must comply with UK GDPR eg ensure fair, lawful and transparent. 	<ul style="list-style-type: none"> <input type="checkbox"/> Screen against the Fax Preference Service (FPS) <input type="checkbox"/> Can opt out <input type="checkbox"/> Must include the senders name and a contact address or freephone number <input type="checkbox"/> If processing personal data must comply with UK GDPR eg ensure fair, lawful and transparent.
Post	<ul style="list-style-type: none"> <input type="checkbox"/> Name and address obtained fairly and lawfully <input type="checkbox"/> Must tell consumer about your postal marketing <input type="checkbox"/> Can opt out <input type="checkbox"/> Must screen against own 'do not contact' lists 	<ul style="list-style-type: none"> <input type="checkbox"/> Can send marketing post to corporate bodies <input type="checkbox"/> Named employees can opt out <input type="checkbox"/> Must screen against own 'do not contact' lists of named employees