

More information

If you need any more information about this or any other aspect of data protection, please contact us.

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Collecting information about your customers – small business checklist



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This checklist helps you to collect and use information about your customers properly. It gives advice about drafting a privacy notice – this is the statement you can give out to people explaining who you are and what you are going to do with their information.

Checklist

- Work out whether you collect personal information about your customers. A list of names and addresses of people you deliver goods to, or a file of contacts you use for telemarketing, is personal information.
- If you do collect personal information, decide whether customers would already know who you are and what you are going to do with their information, including disclosing it to a third party. If not, you should draft a privacy notice and provide it to them, for example in the form of a leaflet.
- Make sure your privacy notice is clear, honest and will be understood by the people it's aimed at. Avoid confusing mixtures of 'opt-ins' and 'opt-outs'. Do not pre-tick consent boxes.
- If you are going to give your customers a choice, for example over the disclosure of their details to another business, explain the choice clearly and respect their wishes.
- Make sure customers know the difference between information they need to provide to get the goods or services they've requested, and information which is optional.
- Review your privacy notice from time to time to make sure it is accurate, up to date and accessible to your customers.
- See our Privacy Notices Code of Practice for more detailed advice about collecting and using personal information.

You should not do anything with personal information that customers might find misleading, unexpected or objectionable. Being open with customers and treating their details fairly should make them want to do business with you again.

Example:

Jan and Sandra are friends with hairdressing and beauty businesses. Jan would like to pass her customers' details on to Sandra so she can promote her new beauty salon to potential customers. A privacy notice like the one below would be a good way of seeking customer agreement for this.

How we use your information

At Jan's Hairstyle, we take your contact details to remind you of your appointments and to tell you about special offers.

If you are happy for us to contact you, please tick the relevant boxes.

Please contact me by:

Post email SMS Phone

We now have a sister business, Sandra's Salon, which may be of interest to you. If you would like Sandra's to contact you about treatments and products offered, please tick the relevant boxes.

Please contact me by:

Post email SMS Phone

Customer Signature

Date