

At META Finance we see personal data as a central building block for any financial services firm irrespective of their proximity to the end customer. Whilst GDPR is a regulation it is also an opportunity to re-shape how commercial teams engage both their customers and suppliers.

## Embedding GDPR in the business

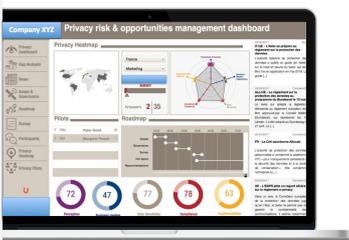
META Finance and UChange came together to build GDPR tools because we have a shared vision. This entails us working together to:

- create tools which help our clients help themselves.
- empower our clients to be agile and deal with the fact that, when it comes to GDPR, you are only as strong as your weakest link.
- view GDPR as an opportunity to re-define your supplier relationships around the use of personal data and in turn build a responsible ecosystem.

## A suite of diagnostic tools aim to help clients get a holistic view on GDPR

### Employee survey tool

Comprehensive GDPR questionnaire, dashboard and report to help firms identify compliance gaps, raise awareness and to identify internal business champions.



### Supplier questionnaire and dashboard

Supply-chain focused evaluation tool to screen and audit how your data processors handle personal data and in turn minimise business risk.



Completed	Organisation	Contact Name	Role	Email	Score	Compliance	Response Rate
08-11-2017	U	Chlo Taylor	IT Director	chlo@uchange.co	72	52	21
08-11-2017	Supplier Alpha	Henry Cover	Head of Compliance	henry.cover@alpha.co	52	35	7
08-11-2017	Data Storage Ltd	John A Braxton	Head of Sales	jbraxton@storage.com	48	42	44
08-11-2017	ABC Ltd	Arthur Jones	Head of Compliance	arthur.jones@abc.co.uk	N/A	N/A	N/A
08-11-2017	Smart Sales Ltd	Mike Fiddler	Head of Business	m.fiddler@smart.com	0	35	45
10-11-2017	Data Supplier Ltd	Tom Jones	Head of Security	tom@supplier.co.uk	72	52	45
10-11-2017	Insurance Data Inc	Bill Brown	CEO	bbrown@insurance.com	100	100	77

### Referral survey

Short-form screening of Data Controllers who introduce personal data to your organisation to aide client on-boarding/servicing.



## An agile and permanent aide to meeting regulatory obligations

Our tools are agile and flexible. Whilst we want to use technology to automate and bring down costs where possible we also believe that:

- Each tool can be adapted to each client's specific nature as no one size fits all.
- Customisation is used to shed light on the important areas specific to your organisation, e.g. Data Quality, Security, Governance, Training and Awareness, Subcontractors, Cross Border controls.
- The tools can be used as part of an ongoing solution to show the ICO compliance / progress towards compliance and most importantly control.

We have also developed solutions for our clients as they move beyond initial GDPR diagnosis.

These include providing coaching materials, a registry tool to facilitate marketing campaigns and lastly a managing agent proposition to help firms find other relevant third parties to support their privacy by design customer strategy.

All of the above we believe will empower our clients and enable them to demonstrate to the ICO a real intent to become compliant and ensure that the ecosystem they operate in is also compliant.

Our focus on using technology and trying to reach smaller firms, such as through the Referral survey, aligns closely with the ICO's own goals for GDPR.

Projects will be **led by Paul Carse** and supported by an experienced team.



## Paul Carse

META CTO

A seasoned IT professional. Paul was CTO at Racing Post where he sponsored and led the information security ISO27001 accreditation. Having lived through a data breach he is well versed in data security and privacy best practice.



## Solen Green

META Finance Project Manager

Solen is an experienced Project and Programme Manager trained in Business Analysis and Stakeholder Management. She has run multiple governance projects covering, PCI-DSS Compliance, GDPR and ISO27001.

For further information please contact [paul.carse@metafinance.co.uk](mailto:paul.carse@metafinance.co.uk)

## Our Partner



U: Change are a paris-based Digital Transformation consultant. Their business brings together fundamental research, consulting and an incubator. They invest particularly in the fields of artificial intelligence and machine learning to automate recurrent data consolidation tasks.

META teamed up with U:Change to deliver GDPR tools as we share a belief in Privacy by Design and Helping firms to help themselves through the use of technology