DITCH THE FAFF.

7 STEPS TO SMARTER SAR MANAGEMENT

aiimi

THE CHALLENGE

Introduction.

With the ever-increasing workload and complexity generated by data subject access requests (DSAR), smart organisations are now automating these processes. But with a vast array of vendors out there promising supposedly improved workflows or redaction capabilities, how do you decide which option will best solve your particular business requirements in the most efficient way?

At Aiimi we feel any DSAR management solution worth its salt needs to have the accuracy of a data discovery engine at its core, and we're confident that our Insight Engine is truly world class. But alongside this, we also believe that the below seven steps are integral to defining a successful DSAR management solution and have developed a short series of discovery sessions to support you along the way. All of our sessions can occur remotely and utilise interactive collaboration tools, such as Miro. This allows for all stakeholders to participate regardless of location, time zone, or schedule and keep abreast of the agreed priorities in their own time.

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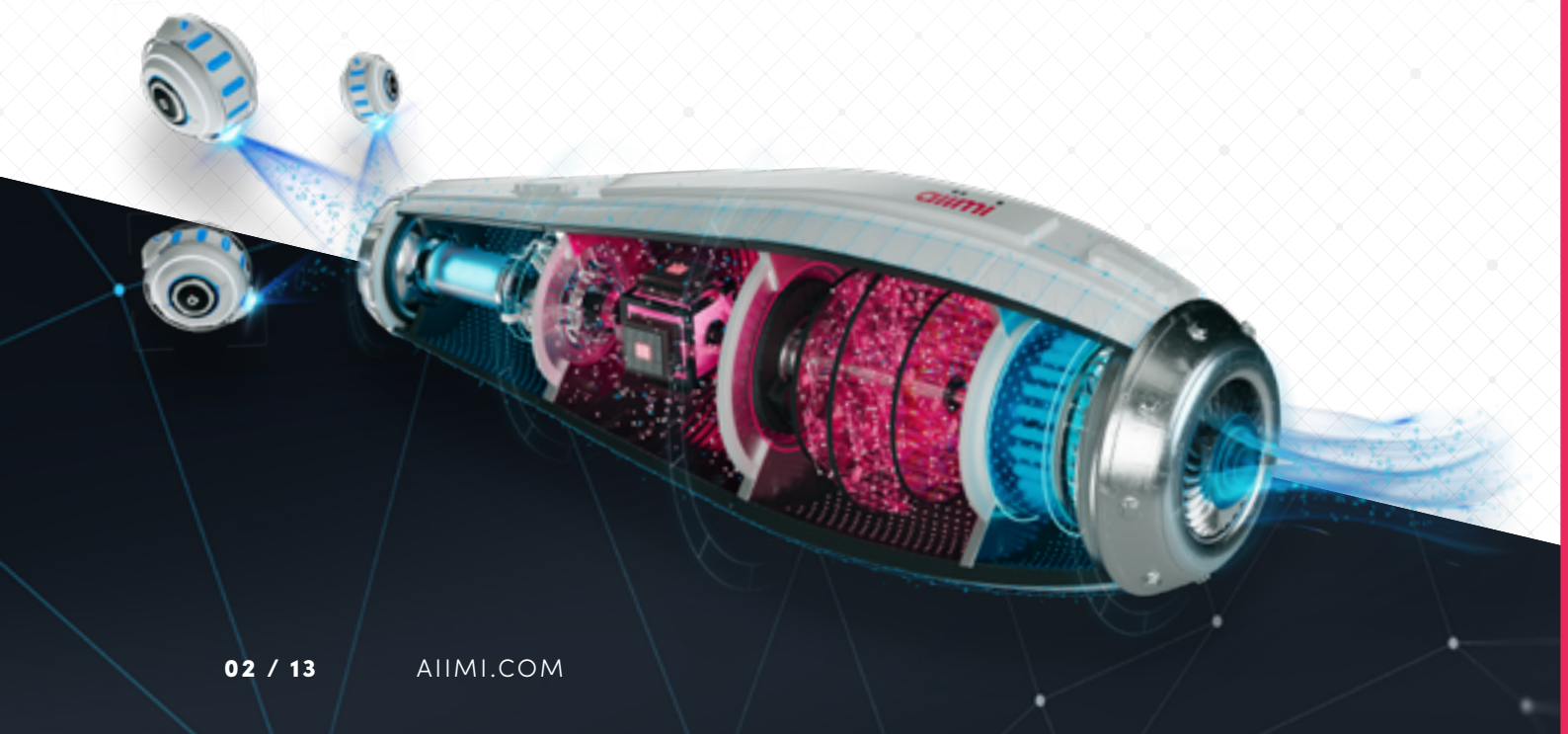


INTRODUCTION CONTINUED

The Seven Steps to Automated SAR Management.

STEP ONE | ASSEMBLING YOUR STAKEHOLDERS

STEP TWO | BUILDING YOUR USE CASE EVALUATION

STEP THREE | BUILDING YOUR BUSINESS CASE EVALUATION

STEP FOUR | THE DATA: MAPPING YOUR DATA LANDSCAPE

STEP FIVE | THE PLAYBACK

STEP SIX | THE PROOF-OF-CONCEPT BUILD

STEP SEVEN | THE EVALUATION

STEP ONE

Assembling Your Stakeholders.

The first thing you will need to do is assemble your stakeholders. These are the members of your business who interact with the current process and will stand to benefit from the proposed solution. They will include, but are not limited to:

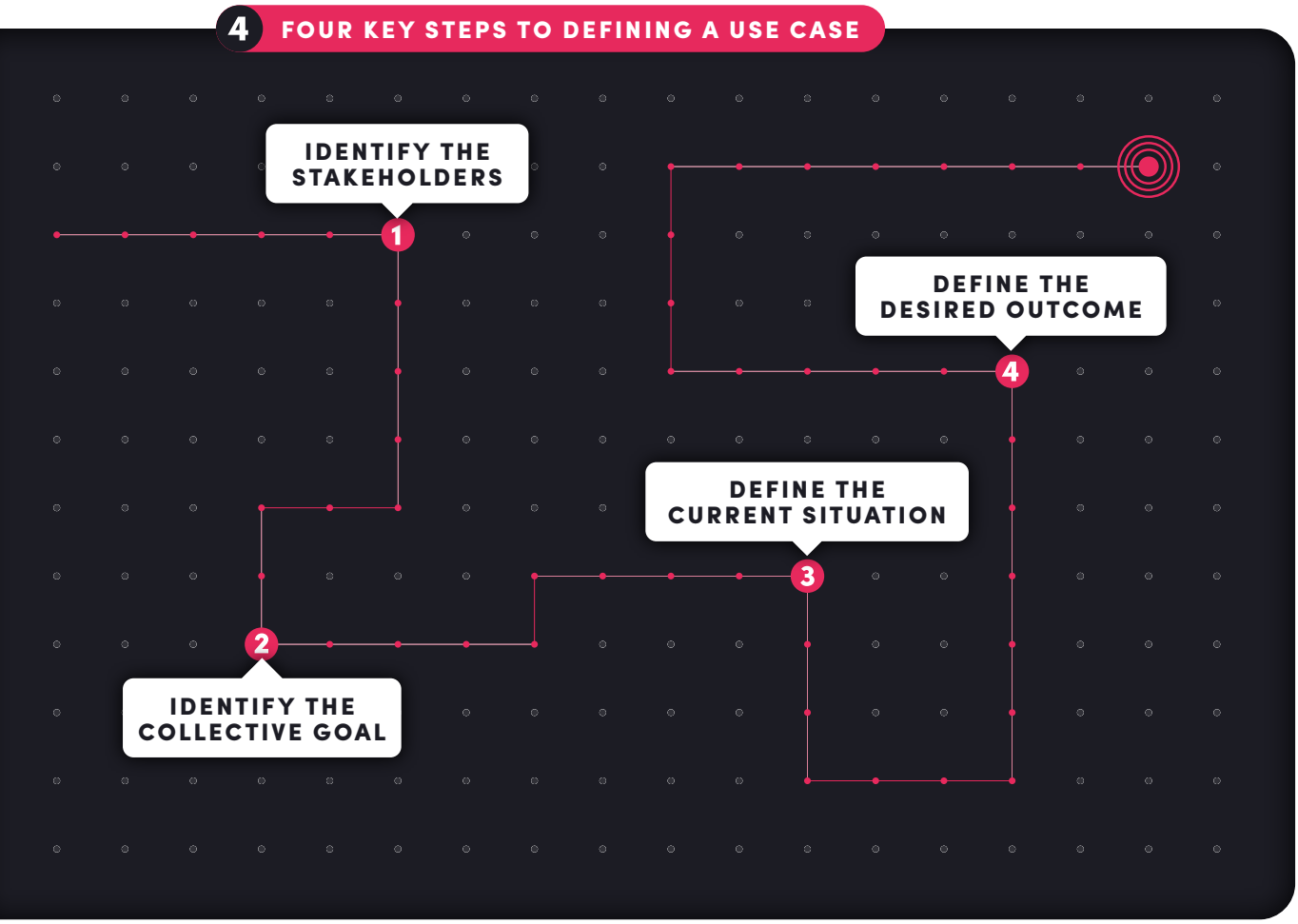
- IT AND INFORMATION SECURITY
- DATA PROTECTION OFFICERS
- CUSTOMER SERVICES
- LEGAL
- HR

STEP ONE CONTINUED

Having located and contacted your stakeholders, establish what their pain points are: What aspects of the current process frustrate them? What do they feel could improve it?

Document their responses and align them with the wider business case. Attaching a score to each stakeholder's need can help you to assess ROI justifications and establish a cost/risk matrix.

Once you have this information structured in an easy-to-digest form, it will become simpler for all stakeholders to comprehend the project, its goals, and where they themselves fit into the solution. This will help to place them within the project and facilitate buy in.



STEP TWO

Building Your Use Case Evaluation.

Simply put, a use case is a set of requirements that defines what is expected of a given system. It should act as a walkthrough to achieving your desired goal. In this first session, we'll help you to determine what challenges you currently face and the environment in which they occur — what do you want to achieve and what will you require to get there?

In this initial session, we'll begin to help you examine your current data environment and how it operates. What systems do you have in place for data storage and retrieval, where is it held, and who are the respective owners? This will allow us to begin the process of defining the key elements within the proposed solution and tailoring it to your specific system requirements.

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STEP THREE

Building Your Business Case Evaluation.

When developing a strong business case, it's imperative to create a documented understanding of potential reputation, financial, and regulatory risks. You will want to determine how much time is currently spent processing DSAR-related requests — both manually or via out-dated technologies. Locate and isolate where inefficiencies lie, calculate how many people, and how much risk, is involved when moving data between teams to process each disclosure.

As well as the current processes, now is also the time to look at what potential data request situations could arise in the future. What legislative changes are in the pipeline? Are there markets in which the business is likely to expand with different regulations? How will this affect the company's risk profile? — for example, are you likely to receive more customer or employee requests following a merger or acquisition? And what changes to the platforms and services involved in processing personal information will this require?

Assessing these current and future processes and environments will enable us to develop a solution that will not only solve your existing challenges but mitigate against potential issues further down the road. Alongside this, we'll be able to prioritise your use cases to ensure we're focussing on the elements that matter most.

UPCOMING DATA PRIVACY TRENDS TO LOOK OUT FOR:

1 | WIDER ADOPTION OF GDPR

2 | EMERGING NATIONAL DATA PRIVACY LAWS

3 | MERGING OF DATA SECURITY AND DATA PRIVACY

4 | INCREASING REGULATORY PRESSURES

5 | A MORE PEOPLE-CENTRIC APPROACH TO DATA MANAGEMENT

STEP FOUR

The Data Inventory – Mapping Your Data Landscape.

By this point, you should now have a fairly detailed picture of where your data and processes are currently at and where you would like to be. Now we will begin to take a deeper dive into your systems and data landscape to ascertain what's achievable. Simply put, this is the cataloguing and evaluation of all the data in your organisation that could contain customer and employee data.

This process allows us to properly specify your new solution to accommodate existing data assets and core processes. Knowing the data that powers your business means we can accurately plan how to cater for existing data and processes in your new solution. The objective here is to identify the age, quantity, format, and overall health of your data. We'll also establish what is core, or relevant, data and what is surplus to requirements in this project. It's important to include any un-registered data stores — such as spreadsheets or databases held by external suppliers — to ensure data completeness.

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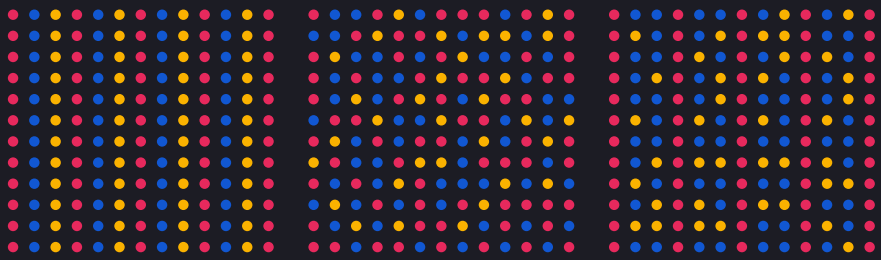
STEP FOUR CONTINUED

Different Types Of Data.

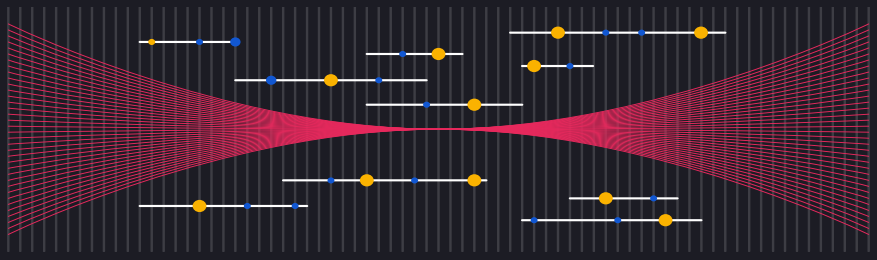
01 | STRUCTURED, UNSTRUCTURED, AND SEMI-STRUCTURED

All data is structured in some form or another. What delineates between them is whether the data has a pre-defined data model and if it's organised in a pre-defined way. For example, some customers may have social media profiles that are tracked, and some don't. This will affect the structure of these people's data.



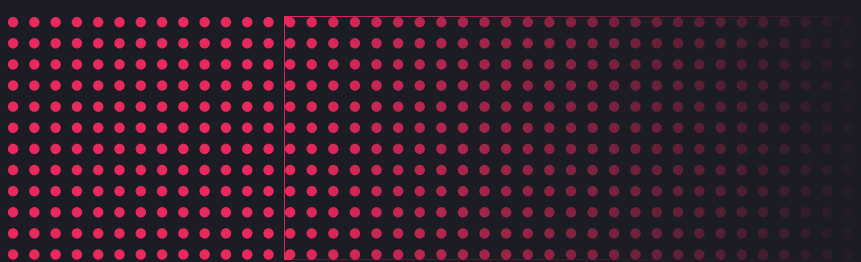
02 | BIG DATA

This has come to be defined as the amount of data that won't fit into a standard database to be analysed or processed in the normal way due to its sheer volume. This is the fuel that drives things like machine learning. By analysing Big Data, we are able to discover patterns and better understand why things happen.



03 | DARK DATA

This is digital information that is not being used and sits dormant in some form. You could view it as data that your business collects, stores, and processes during the course of its activity, but mainly fails to be used for other purposes.



STEP FIVE

The Playback.

All of the pieces to tailor your solution should now be in place. We take all of the findings from the previous four steps to construct wireframes, proposed workflows, and the technical implementation. We'll present everything that we have learned and developed together back to you and your stakeholders to ensure we've created a symmetry of desired outcomes and that functionality is tailored to your unique specifications.

This is an opportunity to examine your solution and ascertain if it solves all your requirements — this is integral when you're looking to process a large volume of customer or employee requests. If one element is under served it can devalue the entire endeavour. Utilising the detailed information gathered in the previous steps will play an important role here so that any potential gaps can be identified and addressed.

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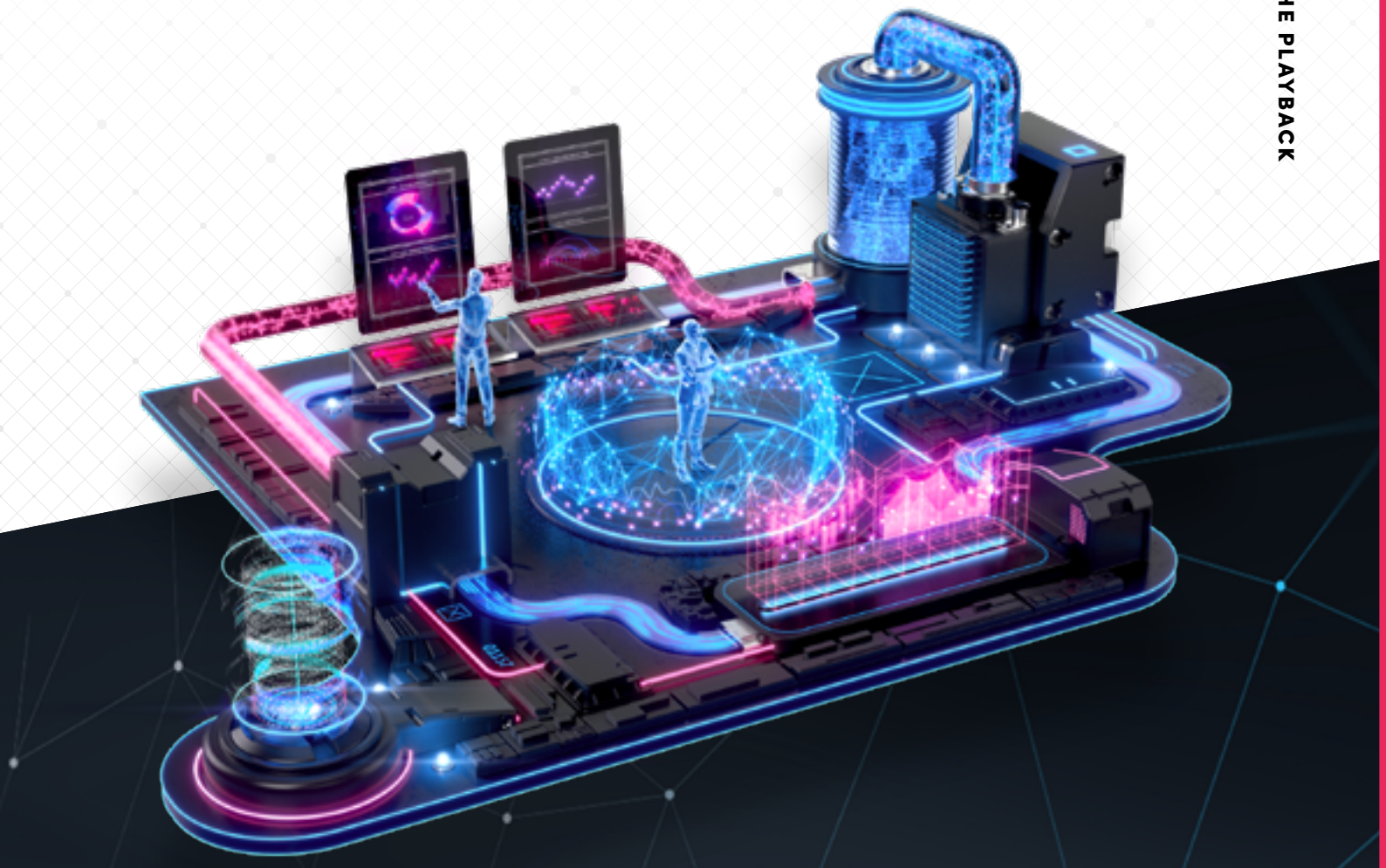


STEP SIX

The Proof-of-Concept Build.

We should now have reached a consensus from all parties as to how your end goal is to be realised and by what means. Now is when we can fine-tune the Insight Engine to your specific requirements. We will set the discovery sources — from which data will be drawn — and construct the optimal enrichment process for extracting relevant insights from that data. Each feature will be configured in line with its individual use case outcome, creating a bespoke automation process designed to realise your unique success criteria.

This phase is integral to proving the technology does what you want it to do, how you want it done. All relevant stakeholders will be able to visualise what their involvement in the new process will look like and how it will streamline their day-to-day task list.

HOW AUTOMATION KEEPS YOUR DATA SECURE:

ROLE BASED ACCESS CONTROL:
Automation manages permissions at scale.

ENCRYPTION AT REST:
Your data is useless to cybercriminals if it's unintelligible to them.

TRACK AND TRACE:
See who did what, when and how.

ONE SOURCE:
Remove the need to send data around the organisation.

STEP SEVEN

The Evaluation.

Finally, it's time to measure success. Your key stakeholders now need to run through all of the business and use cases to confirm that the proof of concept has delivered against their specific criteria. We will workshop this process with you and create an open forum for everyone to feedback. What elements do you think function well? What aspects could be refined or improved? Is there anything that has been left out or under provisioned for?

Once these final elements have been determined and agreed upon, we can begin the process of next steps towards deployment.

> **What elements do you think function well? What aspects could be refined or improved? Is there anything that has been left out or under provisioned for?**

IN SUMMARY

Conclusion.

At Aiimi, we have found that adhering to these seven steps ensures that we create tailored solutions that go above and beyond when it comes to meeting all DSAR compliance requirements. The process of working collaboratively from the ground up, and throughout the process, enables us to better understand an organisation's needs, abilities, and objectives. This ensures that satisfaction is secured for all stakeholders, and no one gets left behind.

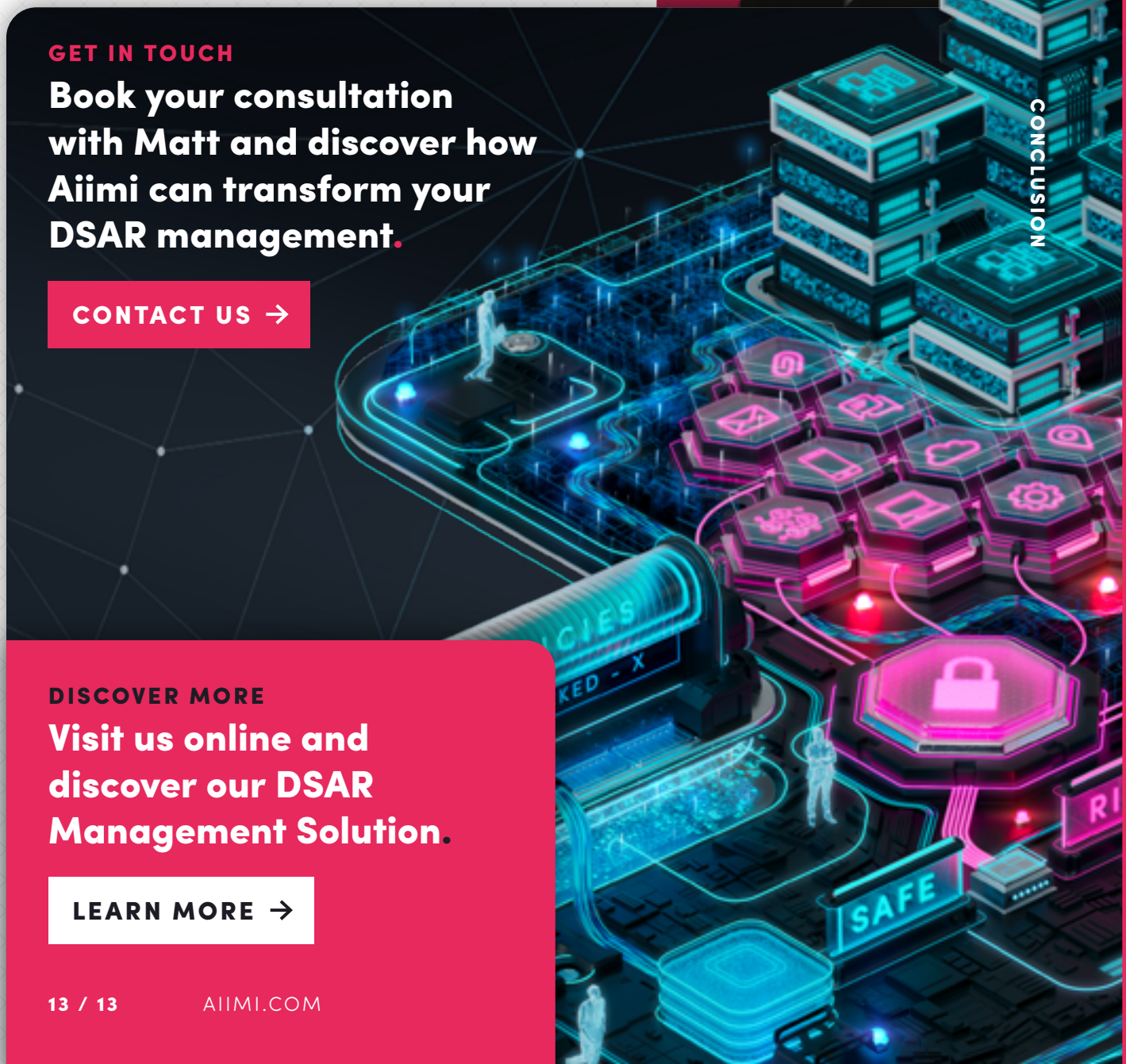
Matt Eustace
Data Protection Lead at Aiimi

If you are thinking of undertaking a DSAR management solution project, contact us a for a free consultation. Our **Data Protection Lead**, **Matt Eustace**, is on hand to answer questions, bust myths, and provide advice around any aspect of the process.

GET IN TOUCH

Book your consultation with Matt and discover how Aiimi can transform your DSAR management.

CONTACT US →



DISCOVER MORE

Visit us online and discover our DSAR Management Solution.

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Aiimi Ltd
Avebury Boulevard
Milton Keynes, United Kingdom, MK9 1FH
enquiries@aiimi.com