Lexis® InterAction® IQ

Privacy and Security Q&A

Lexis® InterAction® IQ is the intelligent choice for relationship management. It helps your firm automatically maintain up-to-date contact information and evaluate the strength of client relationships by:

- **Improving data quality.** InterAction IQ looks at the signatures on emails received from contacts and checks them against data held in InterAction, automatically amending and enhancing existing contact records, or creating new ones where none exist.
- **Delivering relationship insights.** InterAction IQ analyses the activity levels of Outlook emails, email response times, calendar appointments and InterAction activities between contacts and users. This provides an engagement score that allows you to assess the strength (or weakness) of individual client relationships, so that you can take appropriate action.

We know our customers want to be confident that client and other sensitive data is safeguarded at all times. Here are answers to typical questions about Lexis InterAction IQ and data privacy and security.

What happens if an email contains sensitive information?

InterAction IQ reviews only the email signature and email header; it doesn't look at the body text of the email. So any sensitive information the email contains stays secure.

Does InterAction IQ scan personal emails?

InterAction IQ protects privacy and privilege by allowing your staff to specify particular domains to be excluded from IQ Signature Capture. Any contacts set as 'private' will also be excluded. Excluded contacts won't be added to InterAction, and their data won't be updated or shared.

Does collecting and storing a person's data from their email signature comply with the EU GDPR?

The first principle of the GDPR is that personal data shall be processed lawfully, fairly and in a transparent manner in relation to the data subject. So you can collect and store data as long as you can demonstrate why you're processing it. Maintaining contact records in InterAction, and using IQ and other InterAction tools to ensure those records are accurate and complete, enables you to identify people:

- About whom you may no longer have a legitimate reason to hold data.
- Who may not have provided consent for you to hold or process their data.

Can a record be created automatically for a contact who has asked to be forgotten?

No. InterAction prevents re-entry of erased contacts.

Can I prevent changes to records happening automatically?

Yes. You can control review and approval of changes.

Will everyone in the firm be able to see my contacts' information?

Your staff have flexible control over which of their contacts - and what information about them - is shared. When a new contact is created, InterAction IQ can send the staff member in question an email, prompting them to specify whether or not they want that contact shared with the firm.

If I choose to share contacts, can I see who else is connecting with them?

The power of InterAction is its ability to display and analyse all the client relationships and related activities and communication across your firm. Although you may feel a stronger ownership of particular contacts, this approach delivers a number of benefits:

- You can see who else has - or is developing - relationships with individual clients, and the strength of those relationships.
- It prevents staff reaching out to clients without being aware of other activity between your firm and those clients.
- You can prioritise strong opportunities and lines of introduction for your services among clients with whom you may not yet have a relationship.
- The general quality of data about your clients and contacts will improve as more interactions occur for InterAction IQ to cleanse.

Where is the contact data stored?

Contact data is stored in your InterAction database, which is hosted on your own premises, in your chosen cloud or with your selected managed service provider.

Do different types of user have different levels of control?

Yes. Standard users, administrators and data stewards have control over different aspects of InterAction IQ:

- **Standard users** can control which new contacts are added to InterAction via the New Contact Review process; sending/receiving emails; and adding activities to contacts which InterAction IQ then mines.
- **The administrator** controls which users have InterAction IQ enabled, as well as the global IQ settings.
- **Data stewards** can add contacts to IQ Exclusion folders to prevent specific domains from being processed by InterAction IQ.

Does InterAction IQ also mine junk mail folders?

Settings in the IQ Admin area allow you to specify the mining of all mail folders, inbox only, sent messages, and calendar items.

Should the firm inform users that InterAction IQ is monitoring their activity

We recommend communicating with your staff about InterAction IQ so that they understand how they can benefit from using engagement scores and the New Contact Review. It's also important to share how the Signature Capture feature saves time and increases the accuracy of their data.

Contact Us >

For more information

To find out more about InterAction IQ please email us at salesinfo@lexisnexis.co.uk or call +44 (0) 113 226 2065 to speak to a LexisNexis Enterprise Solutions Client Advisor.

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