

LOSS PREVENTION



HOW TO PROTECT CUSTOMER INFO

Protecting customer information is our collective responsibility. Maintaining vigilance and implementing best practices uphold our commitment to safeguarding customer trust.

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How to use Weekly Meeting Topic Guides

What are the Weekly Meeting Topic guides: One-page topic guides to help managers educate their sales team on sales growth topics and strategies.

Goal: BSPK morning meetings are designed for one simple purpose:
to modify behaviors in order to achieve a desired result.

Weekly Topic: The meeting is intended to be delivered daily for an entire week in order to ensure that all team members have fully absorbed the content before moving on to the next topic.

Sections: BSPK morning meetings are divided into 4 easy steps.

- Introduction
- Questions for the team
- Teach the topic
- Set the expectation.

Meeting time: A morning meeting should be no longer than 15-20 minutes.

Best practices:

- Review the content before morning meeting
- Deliver the meeting in your own voice without reading verbatim from the meeting notes
- Use guide as a reference but always make eye contact with your team
- After the meeting, be present on the sales floor and be prepared to provide in-the-moment coaching where needed

What is Customer Information and How to Protect It

Step 1 Introduction

Good morning team. Our focus this week is protecting customer information. It's crucial that we understand what constitutes customer information and how we can safeguard it effectively to maintain trust and compliance. Let's dive into this important topic together.

Step 2 Questions for the team

- What are some types of customer information that we collect?
- Why is it important to protect customer information?
- What are the consequences for our company if a malicious actor obtains our customer information?

Step 3 Teach the topic

Customer information refers to any data that identifies or can be used to identify an individual customer. This includes but is not limited to: Name, Address, Phone number, Email address, Credit card information, Purchase history.

Protecting customer information is essential for several reasons:

- **Maintaining customer trust:** Customers expect us to handle their information with care and respect their privacy.
- **Legal and regulatory compliance:** We are obligated to comply with data protection laws and regulations to avoid potential fines and penalties.
- **Mitigating risks:** Unauthorized access or disclosure of customer information can lead to identity theft, fraud, and reputation damage to our company.

To protect customer information effectively, we must:

1. **Limit access:** When you are utilizing computers, tablets or phones, make sure to log out when you are finished or if you need to step away, even for a moment. Do not leave confidential information on any screens.
2. **Secure physical documents:** Any receipts or documents containing customer information must be stored in the safe. Documents should never be stored in lockers or desk drawers, as these are not secure.
3. **Proper destruction:** We should only print out customer information when absolutely necessary and as soon as it is no longer needed, it should be shredded. Tearing it up and throwing it in the trash is not sufficient because a determined person could reassemble the document.

Are there any questions?

Step 4 Set the expectation (this is how you can say it)

As a team, it's our collective responsibility to prioritize the protection of customer information in everything we do. By maintaining a vigilant stance on data protection and consistently implementing best practices, we can uphold our commitment to safeguarding customer information and maintaining the trust of our valued customers.