

360 LIFECYCLE

BACKGROUND

360 Dotnet provides software as a service (SaaS) to Financial Advisers. Their 360 Lifecycle is an end-to-end practice management system, enabling their customers' businesses to run as efficiently as possible in the current digital age. They have over 6,000 users and cater to Financial Advisers in all areas and to businesses of all sizes. 360 Lifecycle's systems were developed with the client in mind and it is their focus on the adviser-client relationship that sets their services apart from the competition.

CHALLENGES



**PROVIDING SERVICES
IN AN FCA REGULATED
INDUSTRY**



**RAPID
BUSINESS
EXPANSION**



**VARYING
CLIENT
SIZE**



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“Having grown our customer base rapidly, our DPO was also able to assist us in ensuring that our internal systems developed to reflect this growth. The work our DPO has done for us means that we are confident in our internal as well as external data handling practices.”

Chloe Steele // Operations Director, 360 Lifecycle

SOLUTION

Providing services to customers who are FCA regulated means that security is paramount for 360 Dotnet. The company therefore engaged with the DPO Centre to provide a DPO to deliver advice and guidance, and to help maintain their ongoing data protection compliance.

Data protection policies and documentation were reviewed and updated, which included drafting the key controller-processor relationship between 360 Dotnet and its customers, which was then inserted into customer contracts. Additionally, their DPO Centre DPO contributed to the promotion of data protection awareness throughout the organisation, leading whole company training on key areas including breaches and data subjects' rights.

Their DPO Centre DPO also provided advice and support with regard to its internal data handling systems, helping to develop standardised processes to ensure that staff personal data is held responsibly.

OUTCOME

Chloe Steele, Operations Director at 360 Lifecycle, said:

“Our DPO and the overall service has been a brilliant addition to our business. Their expertise has been invaluable in ensuring that we are up to speed with our general data protection obligations as well as those specific to the financial services sector. Having grown our customer base rapidly, our DPO was also able to assist us in ensuring that our internal systems developed to reflect this growth. The work our DPO has done for us means that we are confident in our internal as well as external data handling practices.”

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Chloe Steele // Operations Director, 360 Lifecycle

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