Compliance management in minutes in Kim Document

May 2022

Available from your browser or MS Teams

Business need example

We need all our team members to confirm that they attended the mandatory data protection and information security training session and that they understand their responsibilities.

We need to analyse the responses, act on any issues, store the records and have them available for (i) our annual audit plus (ii) to satisfy our obligations under our customer contracts.

We need to do this quickly, efficiently and make it easy for people to respond.
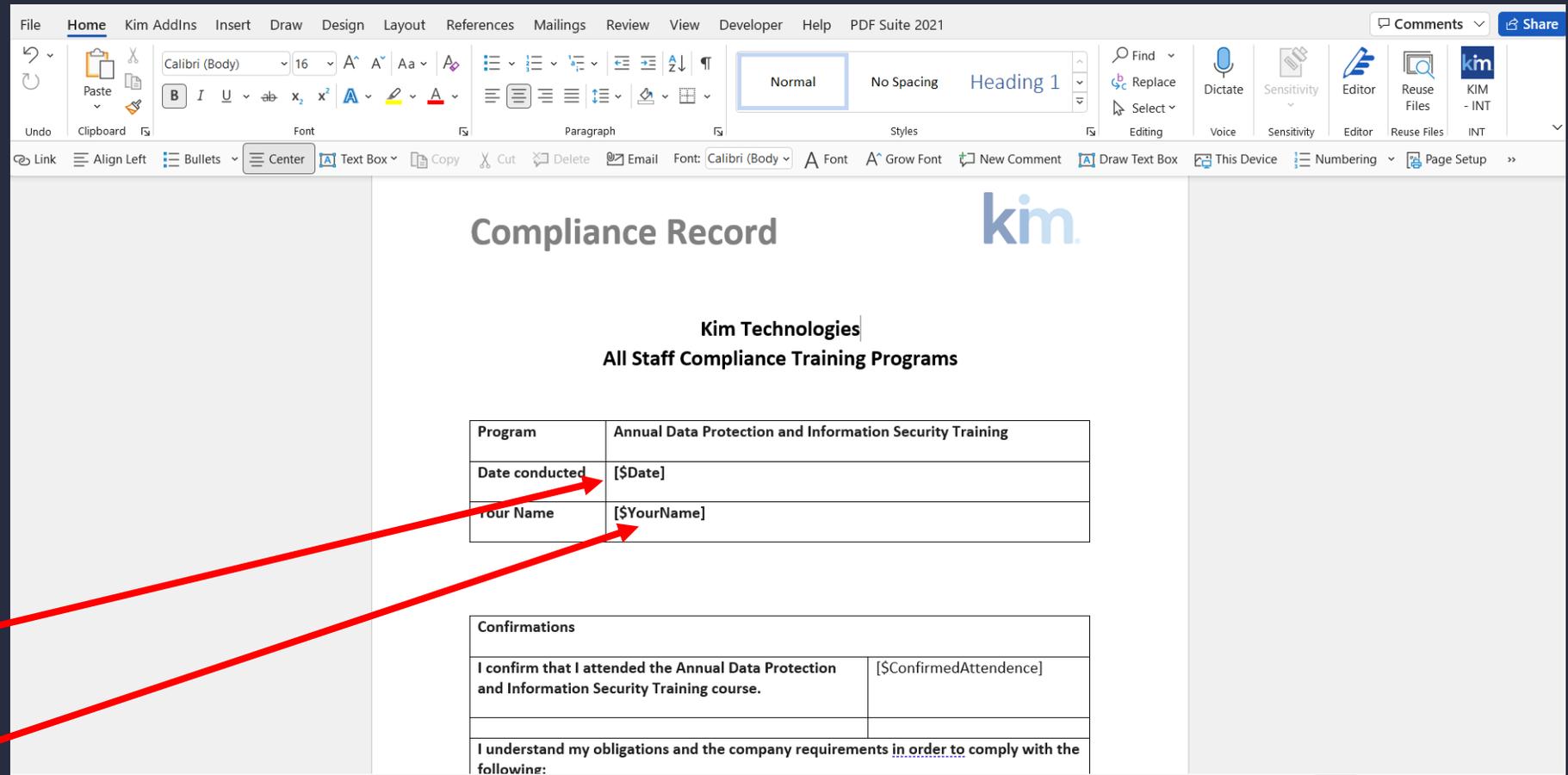
kim

Take your existing document

Step 1: Tag It

Take your existing 'Compliance Record' Word document (or create one) and 'Tag it'

Simply add tags - [$TagName] - to all the response fields
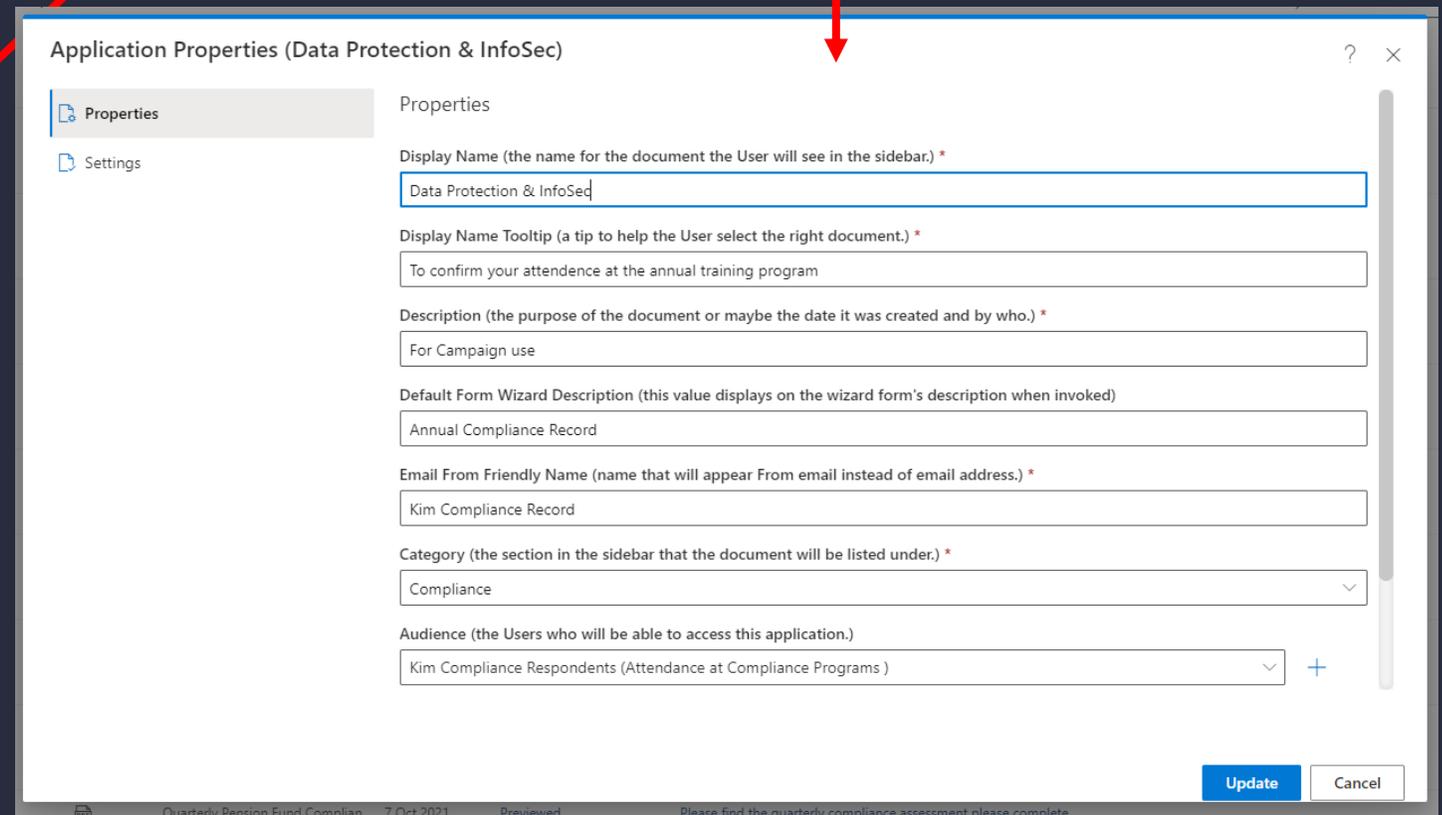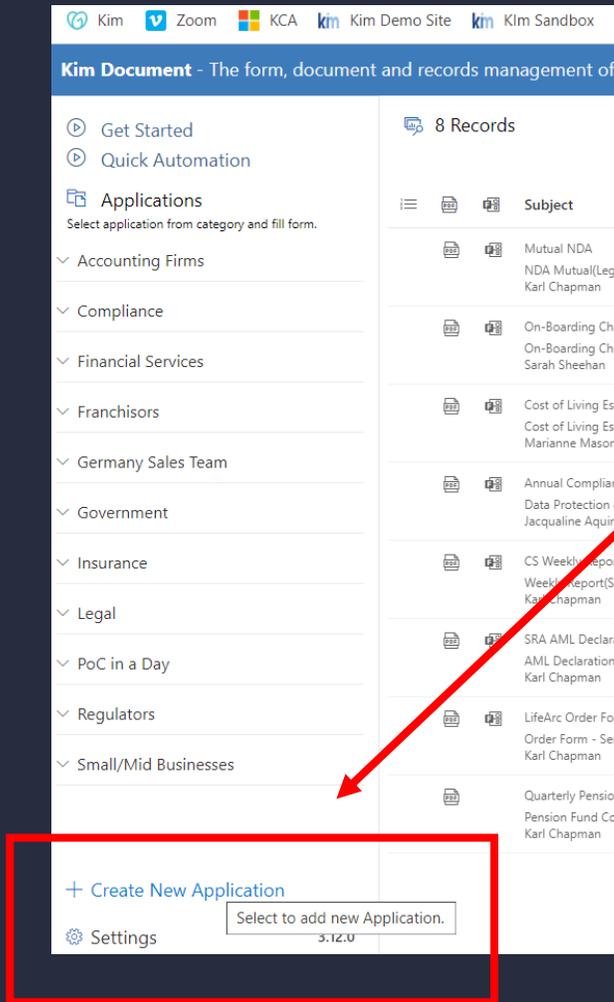
For example:

- [$Date] where you want the date of the course
- [$YourName] where you want the name of the individual

Upload it

Open 'Create New Application' in Kim. Complete properties and upload your Word document

www.kimdocument.com

Automate it

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Step 3: Automate It Use the Kim wizard to create the User form by dragging and dropping the tags

Preview form

Preview how the form will look to a User before you save it and make it available

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Create compliance campaign

Step 4: Create Campaign Select the form you have uploaded (it appears automatically in the left hand menu) and select 'Campaign'

Input compliance details

Select '+ New Campaign'

Add campaign details

Campaign List

+ New Campaign

Name	Description	Begin Date	End D...
Campaign Example for Cu...	Example to share with potential ...	5 Feb 2022	31 Dec
Annual DPA & InfoSec 2021	Annual Data Protection and Info...	7 Dec 2021	14 Dec

Edit Campaign   ? ✕

- 👥 General
- ≣ Respondents/Status

☑ Please activate this campaign by (i) ticking the box and (ii) selecting 'Update Campaign' at the bottom

Campaign Name *

Annual DPA & InfoSec 2021

Campaign Description *

Annual Data Protection and Information Security Training

Campaign Email Owner *

karl.chapman@kimtechnologies.com

Campaign Start Date (Optional)

7 December 2021

Campaign End Date (Optional)

14 December 2021

Return URL (Optional - see tooltip for more information)

https:// www.kimdocument.com

Initial Email Subject *

Kim Annual DPA & InfoSec Training 2021

Initial Email Body (Important - Do not remove [$tags])*   Default Email

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Hello [$userFirstName] [$userLastName],

[Update Campaign] [Send Reminders] [Restart Campaign] [Close]

Write initial and reminder email

kim

Write the initial email that the User will receive (which will also include the link to the form that you have created)

Also write the reminder email that can be sent when Users have not responded

Edit Campaign

- General
- Respondents/Status

Initial Email Subject *

Kim Annual DPA & InfoSec Training 2021

Initial Email Body (Important - Do not remove [$tags]) *   Default Email

| B | I | U | S | " | ☰ | ☰ | 🔗 | ✂ | Normal ⬍ | ↩ | ↪ |

Hello [$userFirstName] [$userLastName],

As part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the '[$campaignName]' course you now need to confirm attendance. By no later than <u>Friday 10 December 2021</u> please **select the link below, enter the access code and complete the form:**

Reminder Email Subject *

Kim Annual DPA & InfoSec Training 2021 - REMINDER

Reminder Email Body (Important - Do not remove [$tags]) *   Default Email

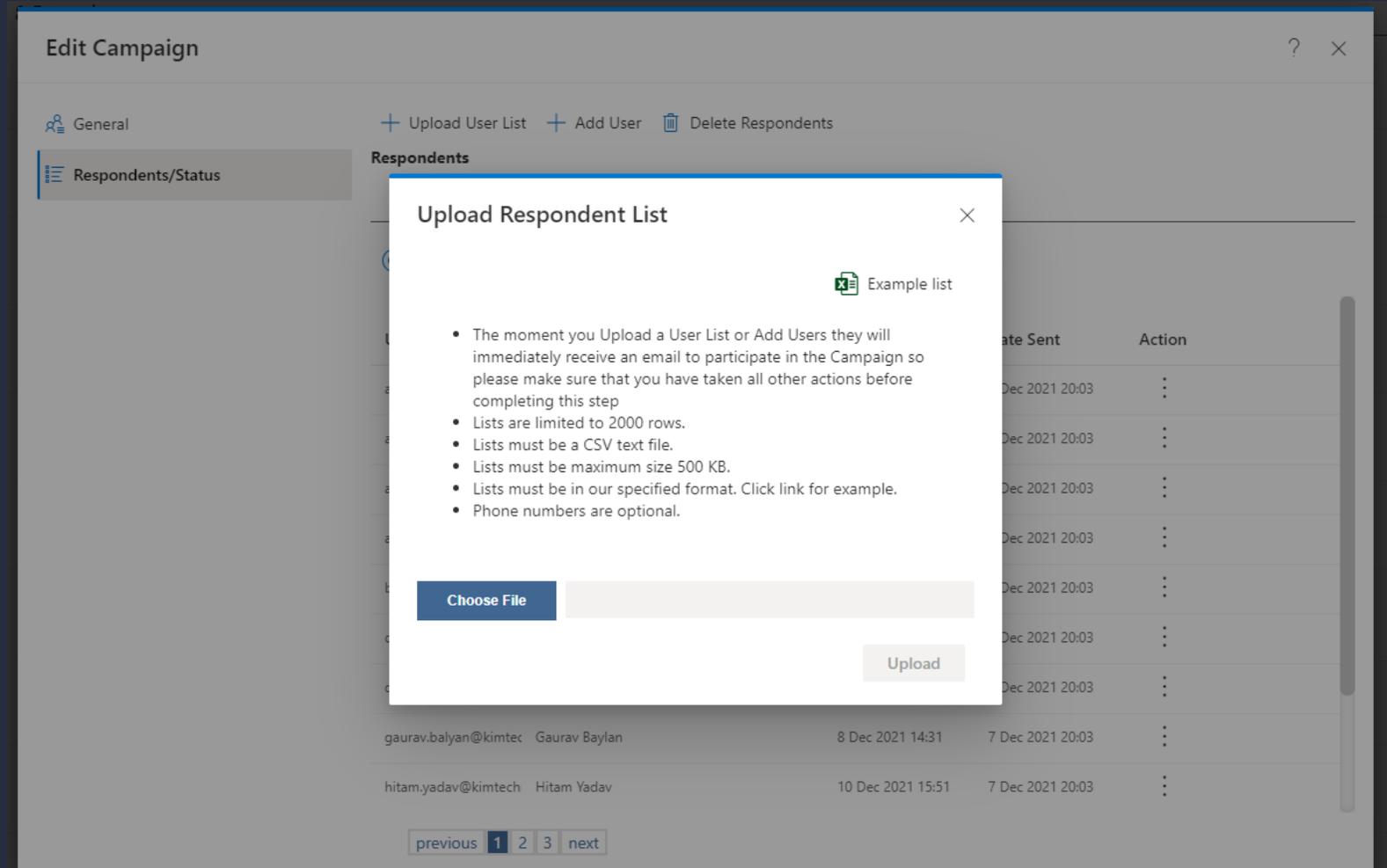| B | I | U | S | " | ☰ | ☰ | 🔗 | ✂ | Normal ⬍ | ↩ | ↪ |

Hello [$userFirstName] [$userLastName],

This is a gentle reminder that as part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the '[$campaignName]' course you now need to confirm attendance. By no later than <u>Friday 10 December 2021</u> please **select the link below, enter the access code and complete the form:**

| **Update Campaign** | Send Reminders | Restart Campaign | Close |

Upload recipient list and send

Either upload a list of the recipients of the campaign email and link, or add recipients manually

Step 5 Send Campaign!

Recipients receive email

Kim Annual DPA & InfoSec Training 2021

KR **Kim Compliance Record** <outbound@kimdocument.com>
12:32

To: sjC@org.com

Hello Karl Chapman,

As part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the 'Annual DPA & InfoSec 2021' course you now need to confirm attendance. By no later than Friday 10 December 2021 please **select the link below, enter the access code and complete the form:**

Form Link: Annual DPA & InfoSec 2021

Access Code: 924706

Once you have submitted the form you will receive an email confirming receipt with a copy of your response attached for your records.

Thank you for attending the course and for protecting Kim and customer data.

Best Regards,

Karl Chapman

email: compliance@org.com

All recipients receive a personalised email (with the content you entered when you set up the campaign)

In the email there is a link with an individual verification code

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Recipients complete the form

When a recipient clicks the link and enters their validation code they are presented with the compliance record form

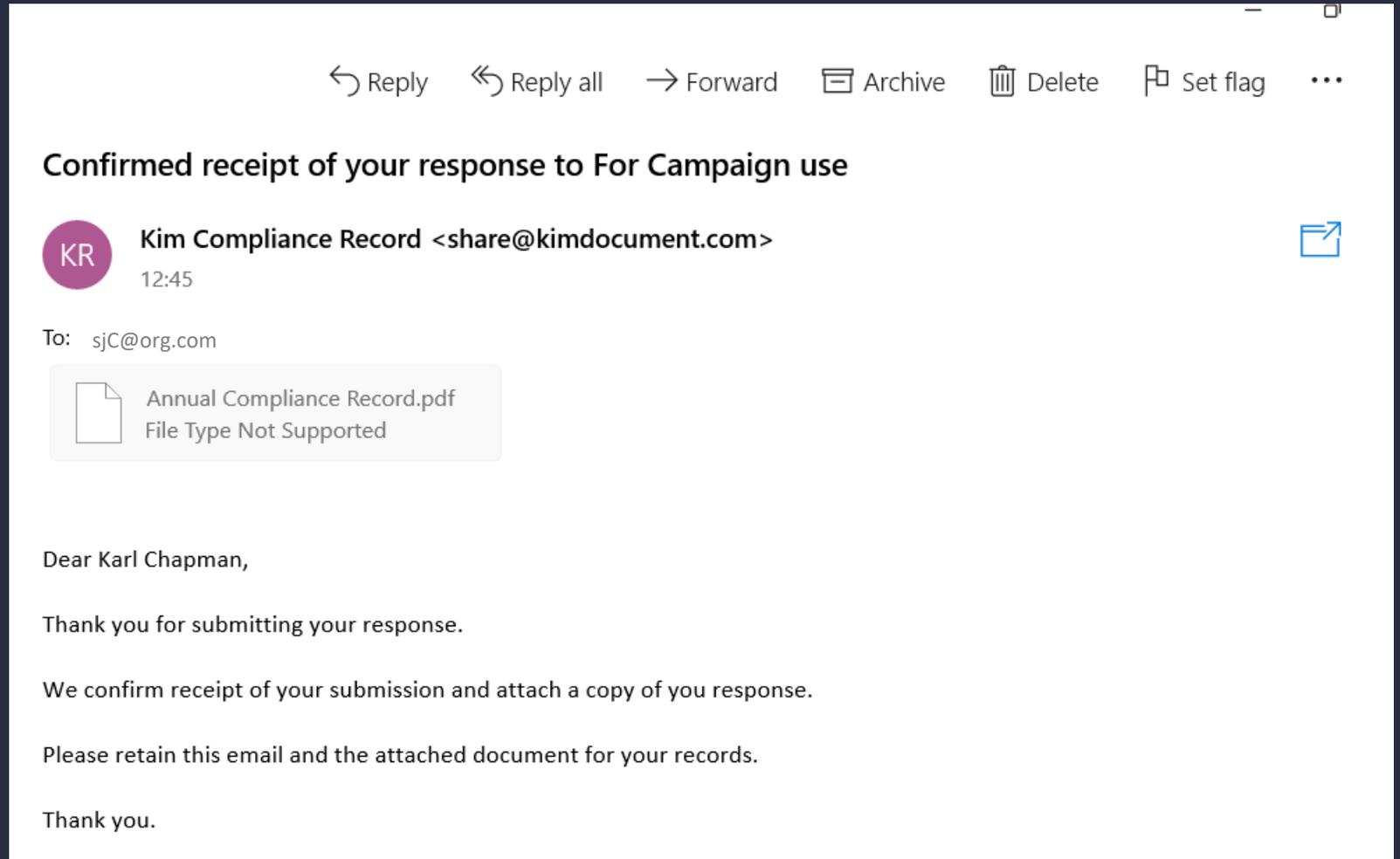The User completes the form and submits

Fields can be made mandatory (*) or optional

Confirmation of submission

Having submitted the form recipients receive an email confirming receipt with a pdf copy of their response for their records

Reply | Reply all | → Forward | Archive | Delete | Set flag | •••

Confirmed receipt of your response to For Campaign use

KR Kim Compliance Record <share@kimdocument.com>
12:45

To: sjC@org.com

Annual Compliance Record.pdf
File Type Not Supported

Dear Karl Chapman,

Thank you for submitting your response.

We confirm receipt of your submission and attach a copy of you response.

Please retain this email and the attached document for your records.

Thank you.

Receive responses

Step 6 Analyze Results

All recipient responses come back into Kim

Full version control is automatically managed

Track progress and remind

You can review overall response rates and track who has not responded and send out reminders

Analyze and act on results

You can bulk download and analyse all responses

Run compliance campaigns in minutes

Do this … — Turn any of your compliance forms and checklists into web applications for employees and customers to use

Get this … — Response tracking. Records management. Downloadable XLS/XML with datapoints for analysis. Audit and governance

And this … — Thanks from colleagues and customers for how easy they are to complete

For this … — From $50/£50 per month (with less hassle thrown in)

kim

Document automation at the speed of light

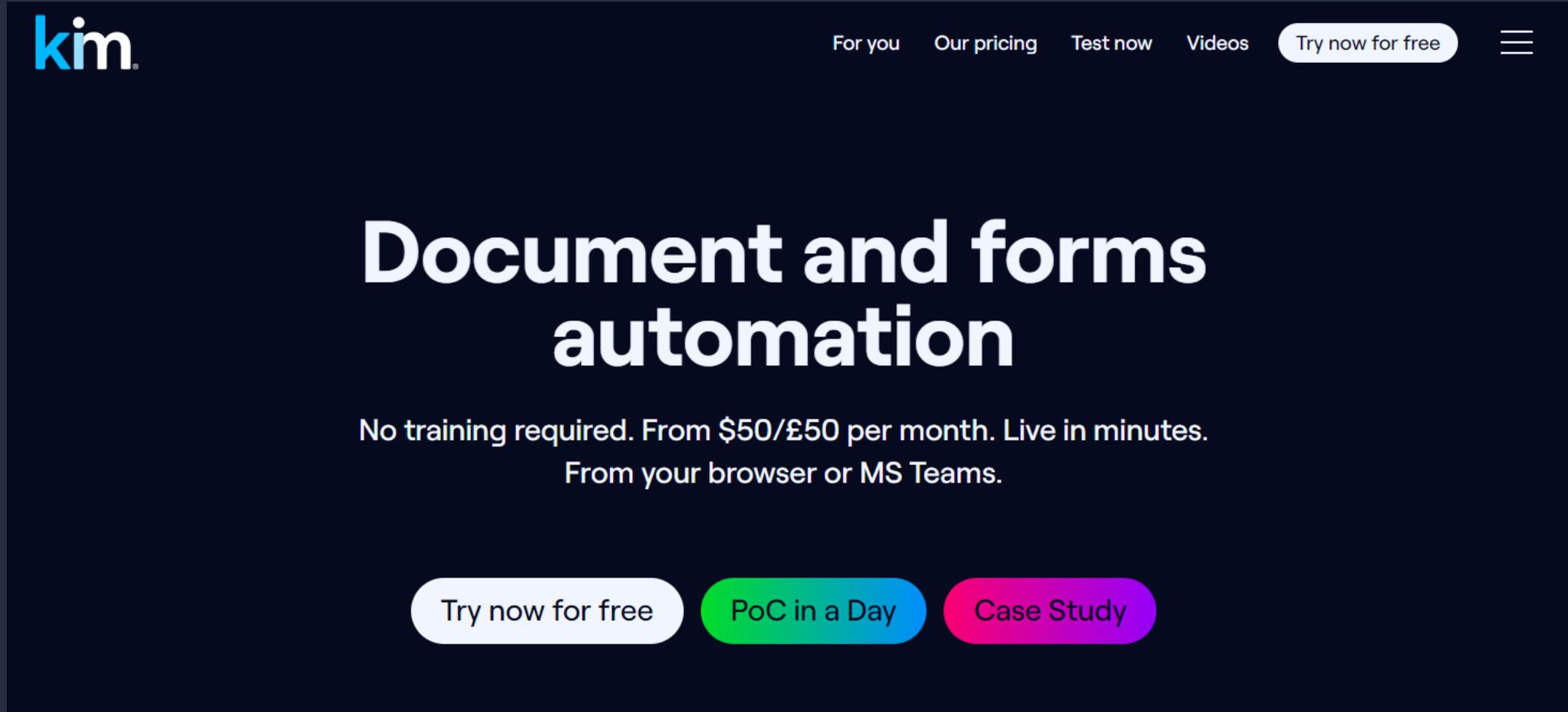**Tag it**   **Upload it**   **Automate it**   **Activate it**   **Share it**   **Analyze it**

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