

GDPR in 2026

A practical health check for your customer data, processes and technology

Why review this now?

GDPR has not been rewritten. What has changed is the environment around it. AI, cloud platforms and new working practices create fresh questions about privacy, responsibility and control.

Choose the response that best reflects your position today. This is a conversation starter, not a compliance score.

01 Data quality

Can you rely on the customer information held in your CRM?

YES PARTLY NO / UNSURE

1	We routinely identify and merge duplicate customer records.	☐	☐	☐
2	Users follow clear standards when entering or updating data.	☐	☐	☐
3	We can quickly identify incomplete, inaccurate or outdated records.	☐	☐	☐
4	Customer records are maintained as part of normal business activity.	☐	☐	☐

02 Retention and individual rights

Do you know what should be kept, reviewed or removed?

YES PARTLY NO / UNSURE

1	We have a documented data retention policy.	☐	☐	☐
2	We know which customer information should be reviewed or removed, and when.	☐	☐	☐
3	We can handle erasure requests through a controlled process.	☐	☐	☐
4	Dormant records are reviewed rather than kept indefinitely.	☐	☐	☐

A useful discussion, not a pass or fail test

Green answers indicate confidence. Amber answers suggest a review. Red or unsure answers help identify where policy, process or CRM configuration may merit attention.

From policy to everyday practice

Review how AI, access and communications are handled across the business

03 AI and data protection

Have policy and oversight kept pace with adoption?

YES PARTLY NO / UNSURE

- | | | | | |
|---|---|-----------------------|-----------------------|-----------------------|
| 1 | Staff have clear guidance for using generative AI tools. | ☐ | ☐ | ☐ |
| 2 | Employees know what customer data should not be shared with AI platforms. | ☐ | ☐ | ☐ |
| 3 | We know which AI tools are in use and how suppliers handle submitted data. | ☐ | ☐ | ☐ |
| 4 | Privacy and governance risks are reviewed when new AI tools are introduced. | ☐ | ☐ | ☐ |

04 Security and access

Is access appropriate, current and auditable?

YES PARTLY NO / UNSURE

- | | | | | |
|---|--|-----------------------|-----------------------|-----------------------|
| 1 | User accounts and permissions are reviewed regularly. | ☐ | ☐ | ☐ |
| 2 | Inactive users are removed when access is no longer required. | ☐ | ☐ | ☐ |
| 3 | Access to customer information reflects each person's role. | ☐ | ☐ | ☐ |
| 4 | We can see who accessed or changed important customer information, and when. | ☐ | ☐ | ☐ |

05 Consent and communications

Can customer choices be shown and respected?

YES PARTLY NO / UNSURE

- | | | | | |
|---|--|-----------------------|-----------------------|-----------------------|
| 1 | Communication preferences and subscriptions are recorded consistently. | ☐ | ☐ | ☐ |
|---|--|-----------------------|-----------------------|-----------------------|

Your next step

1 **Prioritise any red or unsure answers.**

2 **Assign an owner and agree what needs reviewing.**

3 **Use amber answers to plan practical improvements.**

Read the companion article: [GDPR in 2026 - I Thought We'd Done All This Years Ago?](#)

This guide supports internal review and discussion. It is not legal advice and does not determine compliance.