

360 LIFECYCLE

BACKGROUND

360 Lifecycle is a Software as a Service (SaaS) provider delivering end-to-end practice management solutions to financial advisers. With over 6,000 users across firms of all sizes, 360 Lifecycle's platform supports advisers in running their businesses efficiently, while maintaining strong client relationships.

Given the regulatory demands of the Financial Services sector, 360 Lifecycle engaged The DPO Centre to provide an outsourced DPO to deliver strategic advice and maintain ongoing GDPR compliance.



KEY CHALLENGES



OPERATING IN AN
FCA-REGULATED
ENVIRONMENT



SUPPORTING RAPID
GROWTH



SERVING VARIOUS
SIZED CLIENTS

CC

'Our DPO and the overall service has been a **brilliant addition** to our business.'

Chloe Steele, Operations Director at 360 Lifecycle

Amsterdam · Dublin · London · Toronto

+44 (0) 203 797 1289

hello@dpocentre.com

www.dpocentre.com



SOLUTIONS

The designated DPO reviewed and updated data protection policies and documentation, including drafting controller-processor clauses to clarify the relationship between 360 Lifecycle and its customers. These were incorporated into customer contracts to ensure clear, consistent accountability.

The DPO led company-wide data protection training sessions to raise awareness of key topics, such as breach reporting and data subject rights. This helped embed a culture of compliance across the organisation. In addition, the DPO provided guidance on internal data handling, supporting the development of standardised processes to ensure staff personal data is managed responsibly and securely.

As the business scaled, the DPO also helped align internal systems with the company's rapid growth, ensuring data practices evolved in step with operational needs.

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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'The work our DPO has done for us means that we are **confident in our data handling practices.**'

Chloe Steele, Operations Director at
360 Lifecycle