

# **Privacy Policy Overhaul**

**Rocket Companies**

**Scott Greenberg, Q1 - 2022**

# Team Goals

- Create a centralized global privacy policy for the **Rocket Family of Companies**.
- Update the global privacy policy to detail data sharing between **Rocket Mortgage, Rocket Auto, Rocket Homes, Rocket Loans, Rocket Central and Rocket Money**.
- Create a **California Do Not Sell My Personal Information** page.
- Establish **which data is excluded** from affiliate data sharing and data sales.

# **My Goals**

- 1. “Humanize” the content.**
- 2. Increase readability.**
- 3. Make the content easy to skim.**
- 4. Reduce readers’ cognitive load.**

# **Target Audience**

**All Rocket clients and / or potential clients who want a clear understanding of how Rocket collects, uses & shares their data.**

# The Timeline

At the end of a late 2021 kickoff meeting, the stakeholders from the legal team instructed me not to start on the project until further notice.

I checked in with them once a week after that until late January when I was told I had a day and a half to complete the project.

# The Work

While I was concerned about hitting all of my goals in a day and a half, I completed the first draft before lunch and ticked off all the boxes.

After lunch, I presented the work to my design partner to ensure we were on the same page.

By the end of the day, I had a second draft ready.

I took time the next morning to make last-minute zhuzhes.

Accordions are one of my favorite ways to reduce cognitive load. Early on, my designer and I agreed that this was non-negotiable. **Before**, readers were overwhelmed by intimidating amounts of content. **Now**, they're presented with the highlights, and can see as much or as little of the content as they want.

## Information We Derive

## Showing the Work - Part 1



We may derive information or draw inferences about you based on the information we collect. For example, we may make inferences about your location based on your IP address or infer that you are looking to purchase certain products based on your browsing behavior and past purchases.

I humanized the language as much as possible, knowing it would be more palatable for the client to read. While there were a few instances where legalese prevailed, our legal partners were on board with most of my recommendations. **Before**, this content was loaded with dry legal jargon. **Now**, it's brimming with plain language designed to draw the reader in.



**Bold** words are a **simple** and **elegant** way to make **key words** and **concepts pop**. Even when content is broken into smaller paragraphs with bullet points, I like how **bold** words catch the reader's eye. **Before**, these were a series of potentially eye-numbing paragraphs. **Now**, key words and concepts jump out at the reader.

## Information We Automatically Collect

## Showing the Work - Part 2

We automatically collect certain information about your interactions with us or our Services, including:

- **Transactional Information:** When you make a purchase or complete a transaction, we collect information about the transaction, such as product or service details, financial details and the date and location of the transaction.
- **Device and Usage Information:** We collect information about how you access our Services, including data about the device and network you use, such as hardware model, operating system version, mobile network, IP address, unique device identifiers and device regional and language settings, browser type, and app version. We also collect information about your activity on our Services, such as access times, pages viewed, links clicked, products and services considered, and the page you visited before navigating to our Services.
- **Your Content :** As you allow through your device or application, we may collect information and content stored on your device, such as photos.



connect account, interact with or otherwise submit content through our services, make a purchase, communicate with us via third-party platforms, participate in a contest, promotion or survey, request customer support or information about our Services, or otherwise communicate with us. The specific information we collect depends on the context in which you provide it, and could include:

## Showing the Work - Part 3

- Name
- Email address
- Postal address
- Phone number
- Social security number
- Location and approximate value of your property
- Vehicle information, such as make, model, VIN and vehicle features
- Age
- Demographic information, such as race, ethnicity and gender gathered pursuant to federal requirements
- Related loan products or services you've used in the past
- Financial information, such as income, assets and net worth
- Home ownership status and employment status
- Insurance information

**Before, this was an unwieldy block of text.  
Now, it's a sleek and aerodynamic bulleted list that's easier on the eyes.**

# How I Achieved the Goals

1. **“Humanize” the content:** I replaced “legalese” with plain language as often as possible, especially in areas where clarity was key. I also used contractions where possible to give it a slightly more conversational tone.
2. **Increase readability:** I broke up long paragraphs into smaller ones and added bulleted lists where appropriate.
3. **Make it easy to skim: Bold headings and keywords** did a lot of the heavy lifting here.
4. **Reduce readers’ cognitive load:** Placing content under accordions gave readers the option to see as much or as little content as they needed to see at any given moment.

# The Presentation

I presented my work that afternoon to stakeholders from the legal and product teams, as well as my design and engineering partners.

The general consensus was highly positive with only minor changes requested from the legal team.



# The Impact

**22,545,610 clients & potential clients**  
**from various demographic backgrounds**  
**and educational levels were notified of**  
**the update via email and direct mail.**



# The Internal Feedback

*"This project was the embodiment of 'you'll see it when you believe it.' **The complexity of this project was off the charts**, with tons of detail; laws to interpret and process, and threads to tie across Rocket, to ultimately ensure we are doing the right thing by every client we've ever interacted with before, while best enabling the vision and business strategy of Rocket Platform.*

***This group demonstrated amazing execution over this past quarter, with long nights and numerous all-week war rooms, that has put us in a place we previously thought impossible.***

*I cannot thank this group enough for their tenacity and drive. The leverage that this creates for Rocket will be immense. When we think of '**One Rocket**' and the ability to have a unified voice of Rocket out to our clients, this is the core enabler."*

***-- Senior Vice President, Data Intelligence, Rocket Companies***