

FREE RESOURCE

The Canadian B2B Outreach Compliance Checklist

A one-page operating standard for compliant B2B prospecting in Canada — CASL, the CRTC telemarketing rules, PIPEDA and the Competition Act. The same standard every Cosechia lead is built on.



The documented-basis standard

No contact enters a sequence — and no lead is sold — without a documented basis:
source • date • channel • consent or exemption • role relevance • opt-out status • evidence link.

01 Before every send or call

THE BASIS

- ☐ Record a **basis for every contact**: source, date, channel, consent or exemption, role relevance, opt-out status, evidence link.
- ☐ Use only lists you can prove — **no scraped or purchased data** without evidence of consent and relevance.
- ☐ Keep business-contact details tied to the person's **role, function or business**.

03 Calls

CRTC & NATIONAL DNCL

- ☐ **Register** with the National DNCL operator before calling; subscribe to the list if you call consumers.
- ☐ B2B calls to business numbers are **exempt** from the National DNCL — but keep your own **internal do-not-call list**.
- ☐ **Identify** yourself, your company and your purpose at the start of the call.
- ☐ Call only within **permitted hours** by the contact's local time (generally 9:00am–9:30pm weekdays; 10:00am–6:00pm weekends).
- ☐ Honour do-not-call requests **immediately** and suppress the number.

05 Claims

COMPETITION ACT

- ☐ Make only **truthful, substantiated** performance claims.
- ☐ No fabricated **urgency, scarcity or relationships**.
- ☐ Never promise **guaranteed results**.

02 Email & messages

CASL

- ☐ Have a **valid basis**: express consent, valid implied consent (existing business relationship, recent inquiry, or conspicuously-published + role-relevant address), or the referral exception.
- ☐ **Identify** yourself and anyone you message on behalf of, with current contact details.
- ☐ Include a **working unsubscribe** in every message; process opt-outs within **10 business days**.
- ☐ Track **implied-consent windows** (≈6 months from an inquiry; ≈24 months from a transaction or relationship).
- ☐ Keep subject lines, sender names and content **truthful**.

04 Personal information

PIPEDA

- ☐ **Collect only what you need**, and be clear about why.
- ☐ Rely on the **business-contact exception** only when the details are used to communicate about the person's role.
- ☐ Before selling or sharing a lead, confirm the **basis supports passing it** to that recipient.
- ☐ Honour access and withdrawal requests; store securely. **Quebec (Law 25), AB and BC** are stricter.

06 Suppression & records

ONGOING

- ☐ Keep **one central suppression list** — an opt-out anywhere suppresses everywhere.
- ☐ Store **evidence of basis and claims**, retrievable on request.
- ☐ **Audit weekly**: complaints, opt-out timeliness, and records missing a basis.

Want leads that already meet this standard?

Cosechia sells verified B2B insurance leads — each delivered with its full consent trail.

cosechia.com

This checklist is general information, not legal advice. Rules change and vary by province — confirm your program with Canadian privacy and marketing counsel before you rely on it.