

Evaluation Checklist: Compliant Texting Solutions

See how Hearsay stacks up against other compliant texting solutions you're evaluating.

	HEARSAY	OPTION B	OPTION C
COMPLIANCE COMPARISON			
Contextual (threaded) archiving and supervision capabilities for ease of discovery and review to help ensure FINRA compliance	✓		
Integrate with any archiving partner (including Proofpoint, Smarsh, Global Relay)	✓		
Intelligent consent opt-in flow (including TCPA and CASL)	✓		
Enterprise-tested compliance and supervision	✓		
Retain complete ownership of your data	✓		
PII blocking and purging capabilities	✓		
Configurable disclosure requirements	✓		
Complete control over user accounts - oversee, monitor usage, de-activate or terminate accounts	✓		
Surface and block risky texts before they are sent with a prohibited keyword lexicon	✓		
Capture and log all voice call and text messaging metadata	✓		

HEARSAY

OPTION B

OPTION C

ADVISOR EXPERIENCE COMPARISON

Optimized for advisors & agents, including end-user support and client services	✓		
Team delegation (multiple people can work on the same number/workspace)	✓		
Schedule messages	✓		
Send 1:many text messages	✓		
Send and receive photo messages	✓		
Affordable voice minutes	✓		
Voice mail	✓		
Native cellular voice for high-quality calls	✓		
VOIP calling capabilities for desktop web application	✓		
Click-to-Call, Click-to-Text Triggered Actions	✓		
Ease and flexibility of number selection (porting, net new, etc.)	✓		
Ease of advisor/agent onboarding (ability to sign up and begin texting immediately, tutorials)	✓		
Mobile app (iOS & Android) designed for advisors and agents on the go	✓		
Web application ideal for team support from the office	✓		

ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the human-client experience in financial services. The Hearsay Client Engagement Platform empowers over 200,000 advisors and agents to authentically and intelligently grow business relationships by proactively guiding and capturing the last mile of digital communications. The world's leading financial firms—including Allstate, New York Life, Morgan Stanley, and Charles Schwab—rely on Hearsay's SaaS platform to scale their reach, optimize sales engagements, and deliver exceptional client service in a consistent and compliant manner. Hearsay is headquartered in San Francisco, with locations throughout North America, Europe and Asia.

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To drive customer loyalty and improve billing response, take action today. Contact us at:

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