

 hearsay relate

Now

Your have a new lead: Click to call or text now - Jane Garcia

Compliant texting and mobile calling purpose-built for financial services

Hearsay Relate helps firms improve the client-advisor experience by making business communications simple and reliable while meeting global requirements from FINRA, SEC, IIROC, FCA, PRA, and other regulatory bodies.

More than just text and mobile calls, Relate turns agent and advisor devices into mobile productivity centers. Using AI-based automation, team delegation, and workflows, teams can use their desktop and mobile devices to service clients and convert prospects into clients faster and more efficiently. Integrated WhatsApp support also allows your firm to offer additional compliant channels to your field team.


Relate scales as you grow and automatically captures advisor-client interactions and all related metadata with no effort on your part. Set your firm up to meet compliance requirements while streamlining daily operations and capturing insights across the organization.

BENEFITS

- Easily integrate with archiving, CRM, and other core systems
- Effectively mitigate risk with robust security and compliance tools
- Seamlessly separate personal and business communications with a custom Relate work phone number
- Mobile, desktop, and embedded CRM texting offer more ways to engage clients
- Achieve rapid time to value with quick implementation, deployment, and onboarding
- Scale productivity with automation, delegation, and smart workflows

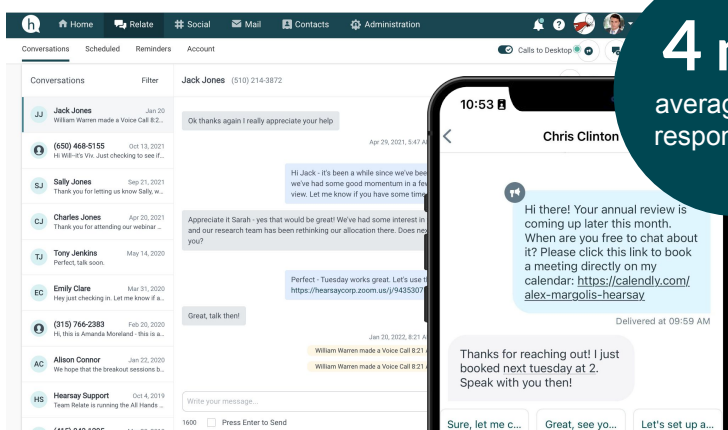
INDUSTRIES SERVED

- Asset management
- Banking
- Life insurance
- P&C insurance
- Wealth management

 4 min
average client
response time 98%

Text message client response rate
—compared with 20% on email

Source: Campaign Monitor

hearsaysystems.com

ENHANCE FIELD TEAM PRODUCTIVITY

- Empower advisors to use auto-generated smart messages to respond to consumer inquiries
- Schedule meetings directly from a text with the tap of a finger
- Delegate service-related text messages to support staff
- Easily scale communications across an agent or advisor's entire book of business
- Bulk schedule and personalize common text messages
- Send group texts and use auto text triggers to stay top of mind

TAKE ADVANTAGE OF INTEGRATIONS

- Easily integrate with your CRM and other core enterprise systems
- Seamlessly archive digital communications by integrating with your existing vendor

STREAMLINE AND SIMPLIFY COMPLIANCE

- Reduce compliance review time and optimize resources with contextual supervision
- Ensure all messages are encrypted in transit and at rest
- Seamlessly integrate text conversations into existing enterprise archiving systems
- Use forbidden keyword lexicon blocking to prevent risky texts from being sent
- Review lexicon and activity-based alerts through a universal supervision dashboard

DEPLOY YOUR IDEAL MOBILITY STRATEGY

- Support your mobile model of choice (BYOD, CYOD, or COPE)
- Integrate with leading MDM/EMM platforms

CRM INTEGRATIONS



ARCHIVE INTEGRATIONS



EMM INTEGRATIONS



“Relate compliant texting was by far the most popular platform across our associates as far as usage—and the most transformational to their business. It allows them to communicate and be in front of clients in a different way than we'd ever allowed them to do before.”



Leigh Heseltine
Sr. Manager of Strategic Partnerships & Emerging Product
TD Ameritrade

To find out how Hearsay can help your advisors and agents, contact us at:

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