

hearsay

Hearsay Relate Admin Guide





Getting Started with Relate for Admins

RELATE OVERVIEW

Welcome to Hearsay Relate. With it, your end-users will be able to text and call clients and accelerate productivity across the field, all while adhering to strict regulatory requirements and remaining compliant. The Hearsay Relate app streamlines communication, separating business and personal communication channels on a single device. It works seamlessly on any Apple or Android device, supporting your organization's BYOD, CYOD, or COPE mobile strategy.

ACCELERATE PRODUCTIVITY

With an intuitive mobile app that's easy to download and install, end-users can text with compliance oversight. Advisors and agents can then quickly schedule appointments and send meeting reminder messages to clients all through Hearsay Relate.

USE INTEGRATED COMPLIANCE AND SECURITY CONTROLS FOR TEXT MESSAGING

Our highly configurable governance and compliance solution enables companies to set controls, supervision, and record-keeping to address requirements from FINRA, SEC, IIROC, FCA, MiFID II, and other industry regulators. All messages sent and received through the Hearsay Relate app are seamlessly captured and the Universal Dashboard provides an efficient workflow to review lexicon and activity-based alerts.

Plus, policy-validated compliance controls allow you to restrict outbound messages by the type of content, such as URLs, photos, PII, or lexicon-based text alerts, to flag risks and prevent inappropriate communication.



98%

Client response rates
from texts
(compare to 20% on
email)



90%

of texts are read
within 3 minutes



4 min

average client
response time

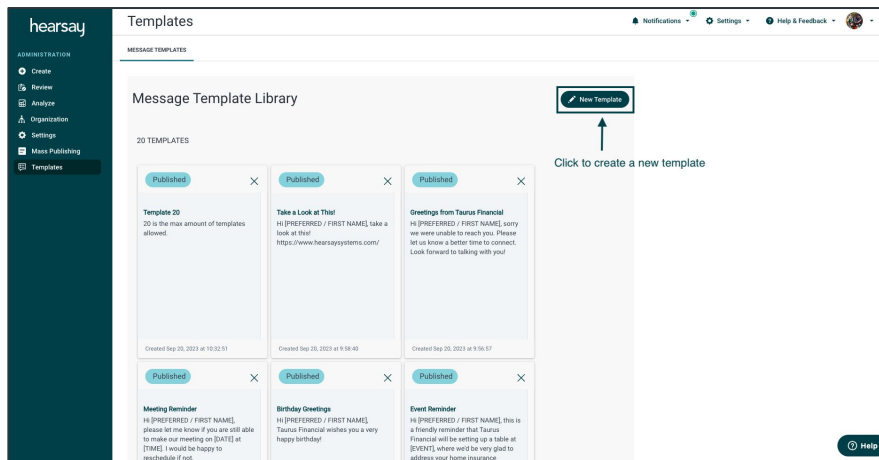


CREATING AND MANAGING TEXT MESSAGE TEMPLATES

Message templates allow users to save time when sending the same message to different clients. Administrators can create message templates, allowing them to draft consistent messages that align with their organization's best practices, and helping them reduce the time users spend creating the same message content. Users can access available templates in the Relate message composer. Supervision and archiving of message templates follow each organization's existing compliance settings for one-to-one conversations. Message templates are only available in the Relate web platform.

Follow these steps to create a message template in the Administrator view. Only administrators can create templates.

1. Click **Template** from the side navigation menu,.
2. Click the **New Template** button in the top right of the screen.
3. Add a unique template name and template text (1600 characters maximum) in the template composer.
4. Click **Create and publish** to make the template available for use, or click Cancel to discard the template.



NOTE:

- A maximum of 20 templates can be created.
- Templates can contain URLs, but no attachments such as images or PDFs.
- Templates are accessible the entire org, and they cannot be restricted by hierarchy.
- Templates cannot be edited. If a template needs to be changed, it must first be deleted and then recreated with edited text.
- Deleted templates cannot be viewed or retrieved.



TEXT MESSAGES IN SUPERVISION

Text messages that contain a lexicon term or phrase will be collected within your supervision queue. To view these text messages:

1. Log into your Hearsay admin account and click **Review > Supervision**. Click **Filter Results** and check **Hearsay Relate** under **Account Type** to isolate the supervision queue to alerted text messages. Save this search for easy access.

Submitted By	Account Type	Type	Keyword Category	Review Type	Status	Created	Assigned To	ID
Disclaimer	Hearsay Relate	Text Message	-	Sampled	Unreviewed	05/05/2023 5:01 PM	-	1628575
Hearsay University	Hearsay Relate	Text Message	-	Sampled	Unreviewed	05/04/2023 3:06 PM	-	1628476
Disclaimer	Hearsay Relate	Text Message	-	Sampled	Unreviewed	05/03/2023 5:02 PM	-	1628444

2. There are 3 ways to respond to a text message alert:
 - **Dismiss:** Allows the admin to remove the alert from the supervision queue without contacting the user.
 - **Mark as Resolved:** Allows the admin to remove the alert from the supervision queue with the assumption the admin has reached out to the user about the text message.
 - **Email:** Allows the admin to contact the user via email to alert the user that the text was outside of their organization's policy to prevent recurrence.

ALERT/BLOCK TEXT MESSAGES BASED ON LEXICON TERMS

Admins can be notified of specific text messages sent by their users if the text contains a term listed in the organization's lexicon list. To access this list, log into your Hearsay admin account and click **Settings > Organization Settings** and click the **Lexicon** tab. Terms in your lexicon list will trigger supervision alerts. If your organization wishes to alert and block a user from texting using a lexicon term, please contact Hearsay Support to configure this functionality.



HEARSAY RELATE REPORTING

The **Analyze** tab is where you can monitor and evaluate your organization's Relate activity metrics via Hearsay Dashboards and Reports. Visit the Help Center to access and download [Hearsay's Guide to Reports & Dashboards](#).

Getting Started

1. From the **Analyze** tab, you can navigate to either **Dashboards** or **Reports** (for individual reports).
2. You can access additional documentation and definitions of the report's column headers by selecting the report and clicking Report documentation and data dictionary available here from the top right of the screen.
3. The latest data available is from the day before the current date and not real time data. All changes recorded until 0:00 UTC are loaded by 9:30 UTC. As no date filter can be applied on the report, when downloaded after 9:30 UTC, the data in it will show the status as of yesterday.

The screenshot shows the Hearsay 'Analyze' interface. On the left is a dark teal sidebar with the 'hearsay' logo and a menu under 'ADMINISTRATION' including 'Create', 'Review', 'Analyze' (highlighted), 'Organization', 'Settings', 'Mass Publishing', and 'Actions'. The main content area is titled 'Analyze' and has tabs for 'DASHBOARDS' and 'REPORTS'. Under 'Dashboards', there is a 'General' section with a table of dashboard categories. Below that is a section for 'Outcome value measure dashboards' with another table. The top right of the interface includes links for 'Notifications', 'Settings', 'Help & Feedback', and a user profile icon labeled 'H'.

Name	Description
Activities Compliance	Status of post reviews, alerts, turnaround times
Content Engagement	Measure the views, clicks and engagement of suggested contents
Content Performance	Measure the performance of suggested and original contents
Content Publishing	Measure the usage of suggested content
Field Engagement	User activities, contact engagements
Field Performance	Connections, social publishes, social engagements
Overview & Adoption	Workspace and user adoptions, connections and social accounts
Profiles Compliance	Status of profile review, approval status, alerts, turnaround times

Name	Description
Actions	Program Overview, Contact Assignment, Contact Communication, Action Results
Reach and Attract	Content creation, finding and publishing, Social profile management and social connections
Retain and Grow	Contacts, contact engagements, voice/text/social DM breakdowns



HEARSAY RELATE REPORTING (CONT.)

To generate and download a report:

1. Select the report
2. Select the date range of data
3. If applicable, select other filters (e.g. by region, tags, etc.)
4. Click **Filter Report**
5. Click **Download Report**

The following Hearsay Relate reports can be located by logging into your Hearsay admin account and clicking **Analyze > Reports**.

Text Messages – All Data

This report showcases all text messages sent from a specific workspace, including date and time, the author of the text message, and more. Report documentation and data dictionary available on [Hearsay Docs](#). (Password: **HearsayDocs**)

Text Messages – Response Times

This report provides the amount of time between sent and received text messages from both the contact and the user. Report documentation and data dictionary available on [Hearsay Docs](#). (Password: **HearsayDocs**)

Text Messages – Attestation History Data

This report displays information regarding the attestation opt-in message, which contacts were sent the attestation message, and which contacts responded to accept or reject the ability to text. Report documentation and data dictionary available on [Hearsay Docs](#). (Password: **HearsayDocs**)

Voice Call – All Data

This report showcases all voice call activities. Report documentation and data dictionary available on [Hearsay Docs](#). (Password: **HearsayDocs**)

Within **Analyze > Reports** you can also access **Compliance** and **Enterprise Management** reports such as:

- Alerts
- Account Directory
- Admin Directory
- Setting History
- User Directory
- Workspace Directory



HEARSAY RELATE PROGRAM DASHBOARD

The Retain and Grow dashboard focuses on 1:1 client engagement measures and contact engagement activities. The key Relate insights from this dashboard are the dynamics of the contacts and the contact engagement activities, and the voice and text messaging statistics. These dashboard can be accessed by logging into your Hearsay Admin account and clicking **Analyze > Dashboards**.

RETAIN AND GROW DASHBOARD - CONTACTS

- Purpose of this dashboard: presents the dynamics of the number of contacts on total and workspace level
- Summary of insights this dashboard offers:
 - # contacts (total)
 - # median contacts per workspaces
 - Opt-in statistics
- What other dashboards you should use in conjunction with this dashboard:
 - L2 Contact engagement dashboard

Questions Addressable by this Dashboard	Metrics to Review
How is the total number of contacts changing month over month? What are the trends?	Number of Contacts
Does the number of contacts per workspace show an increasing or decreasing trend?	Number of Contacts per Workspace
How many workspaces have more than less than 100, more than 500 contacts?	Number of Contacts per Workspace
How is the opt-in % changes month over month?	Ratio of Contacts by Attestation Status



RETAIN AND GROW DASHBOARD - CONTACT ENGAGEMENT

- Purpose of this dashboard: presents the trend of contact engagements on total
- Summary of insights this dashboard offers:
 - Number of contacts engaged
 - Number of inbound/outbound contact engagements
- What other dashboards you should use in conjunction with this dashboard:
 - Contacts
 - Relate Voice
 - Relate Text

Questions Addressable by this Dashboard	Metrics to Review
What is the preferred way to communicate with the client (voice/text/DM)?	Avg number of contacts engaged per WS by channel
How many engagements are month over month for text/voice/DM?	Social - Avg number of contacts engaged per WS Relate - Avg number of contacts engaged per WS
How is the number of inbound/outbound communication changing month over months for text/voice/DM?	# Inbound vs Outbound contact engagements by voice/text/DM
How many workspaces have engaged with more than 20/50/100 contacts?	# contacts engaged per workspace



RETAIN AND GROW DASHBOARD - RELATE VOICE

- Purpose of this dashboard: gives details on voice usage, contact engagements and response times
- Summary of insights this dashboard offers:
 - Average number of voice calls per WS
 - Number of contacts engaged with voice per WS
 - Number of inbound/outbound calls in total
 - Number of missed inbound calls per WS
 - Average call duration (inbound, outbound)
- What other dashboards you should use in conjunction with this dashboard:
 - Relate Text
 - Contact engagements

Questions Addressable by this Dashboard	Metrics to Review
How is voice usage trending on WS level?	Average number of calls per WS
How many contacts were engaged per WS on a monthly basis by using voice calls?	Number of Unique Contacts Engaged with Voice per Workspace
How many inbound and outbound voice calls were made in total? Trends?	Number of inbound/outbound calls
How many incoming calls were missed by the agents?	Number of missed inbound calls
What is the average duration of the inbound/outbound calls?	Average call duration



RETAIN AND GROW DASHBOARD - RELATE TEXT

- Purpose of this dashboard: gives details on text usage, contact engagements and response times
- Summary of insights this dashboard offers:
 - Average number of texts per WS
 - Number of contacts engaged with text per WS
 - Median response times for inbound/outbound texts
- What other dashboards you should use in conjunction with this dashboard:
 - Relate Voice
 - Contact Engagements

Questions Addressable by this Dashboard	Metrics to Review
How is text usage trending on WS level?	Average # texts per WS
How many contacts were engaged per WS on a monthly basis by using text?	Number of Unique Contacts Engaged with Text per Workspace
How many inbound and outbound messages were sent? Trends?	# texts by type
What is the average response type for inbound texts? How quick the agents/advisors reply	Inbound / Outbound Response Times (Median)
What is the average response type for outbound texts? How quick do the clients reply?	Inbound / Outbound Response Times (Median)
How many texts were answered within 5/30/60 minutes?	Inbound / Outbound response by time