

Broadcast Messages

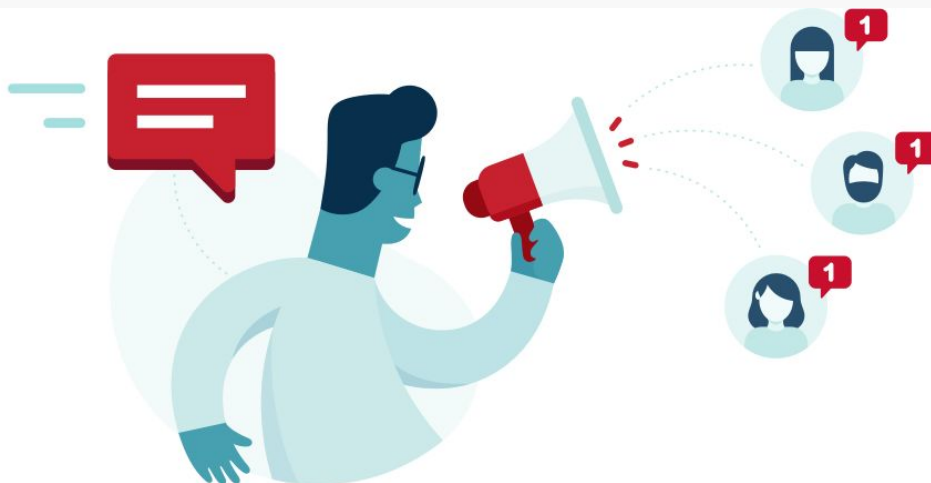
Wealth Management

What are Broadcast Messages?

Relate customers repeatedly requested the ability to send texts to unique contact lists. With Broadcast messages, Relate users can now send texts to up to 8 opted-in clients with a single click. **Critically**, all replies to Broadcast Messages will be received in a 1-to-1 manner. Advisors can now reach out quickly and efficiently to a select group of clients, and then carry on that conversation in a personal way.

Broadcast Messages Use Cases

- **External Announcements:** Notify contacts about address, phone number, and office hour changes.
- **Internal Announcements:** Corporate can send materials and information to advisors through text. Lead Advisors can send mass messages to members of their office in the same way.
- **Market Movements:** Quickly contact your highest net worth clients to reassure them during volatile market movements.
 - Send updates whenever there's an update with the market.
 - Continue conversations separately about individual portfolios.
- **Annual Reviews:** Contact groups of clients whose annual reviews are coming up around the same time.
 - Send updates annually.
 - Continue conversations separately to set a meeting time for each individual's annual review.



Limitations and Restrictions

Currently, advisors can create Broadcast Messages only on the web desktop interface. After creating them, you can then continue using the Broadcast Messages on mobile. You can also reply to individual conversations that are created from the Broadcast Messages on both desktop and mobile.

You can also send a Broadcast Message to a maximum of 8 contacts at a time. Initially, we want to ensure Broadcast messaging isn't used to spam customers. In time, we fully expect to increase this limit (with a potential maximum of 25 per FINRA guidance).

To learn more about how to create and use Broadcast Messages, read our article titled [Broadcast Messages](#) on the Help Center.

Have questions? Please contact your Customer Success Manager or support@hearsaysocial.com.