



Texting & Mobile Calling – Designed Just for Advisors

AN EASY, COMPLIANT WAY TO COMMUNICATE ON-THE-GO

Every day, you're prospecting and deepening your relationships with clients – both online and in-person. And let's face it, administrative work takes up way more of your time than you'd like. Staying compliant can be a chore but it's essential. At the same time, your clients preferred communication channel is texting (like everyone else these days).

Now, with Hearsay Relate, you can easily stay in touch with clients and prospects via text and high-quality cellular voice, compliantly, while saving time too. Relate provides a productivity boost beyond the standard texting feature on your phone with extras like the ability to share an SMS inbox with your assistant, broadcast a message to multiple clients at once, and schedule texts for when they fit in to your schedule or your clients'.

EASILY SEPARATE BUSINESS AND PERSONAL

You may take your work home with you, but you don't want to take your home to the office – particularly if an audit were ever to occur! Hearsay Relate ensures complete separation between your personal and business communications on each individual device, identifying conversations based on phone number and only logging those from your business line. Leverage your existing landline number or receive a new business number from Hearsay within minutes. The Relate app works seamlessly on any iOS or Android mobile phone or tablet or from your desktop via a web-based app.

A MORE POWERFUL WAY TO TEXT ANYWHERE, ANYTIME

Quickly schedule appointments, send reminders to clients, then follow up with a phone call – all within the same app. Log in to the web-based texting portal from your desktop to increase productivity even further. Delegate repetitive tasks to your administrative team; they can text on your behalf. Either of you can even schedule a message to broadcast to multiple clients at one time. Stay connected and available when and where you want.

KEEP IN TOUCH DURING THE MOMENTS THAT MATTER

Increase touch points by using your clients' preferred mode of communication. Texting is a convenient and simple way to handle common tasks such as:

- Scheduling an annual review
- Appointment reminders
- Birthday and anniversary wishes
- Invitation to a retirement seminar

3M+

TEXTS DELIVERED
THROUGH
HEARSAY RELATE

90%

OF TEXTS ARE READ
WITHIN
3 MINUTES

98%

CLIENT RESPONSE
RATES FROM TEXTS
(COMPARE TO 20%
ON EMAIL)

High-performing Advisors Communicate with Hearsay Relate

DECREASE DISTRACTIONS AND BECOME A PRO TEXTER

Hearsay Relate has built-in features that make texting easier than ever before. Leverage AI generated Quick Replies to easily send a follow-up text with one tap. Or, just speak your response and let Siri or Google Voice integrations type the text for you. Say goodbye to spam - with Hearsay Relate you can easily flag incoming texts or calls as spam and put the number on a blacklist.

SAVE TIME LOGGING CRM ACTIVITY

Hearsay Relate's CRM sync automatically pulls the latest client contact details onto your device so you can start texting clients immediately. All calls or texts sent from your Hearsay Relate business number are also automatically logged in your corporate CRM, saving you hours of manual data entry. All data is then sent through Hearsay's compliance supervision platform and into a corporate archive to ensure regulatory compliance is maintained, with no effort on your part.

Use Hearsay Relate to stay relevant and connect with clients on their preferred channel, in a more convenient and efficient way.



ANY CRM

"Texting is the biggest game-changer. It improves the efficiency of agencies more than any other program."



NICK DEROSA
AGENCY OWNER
ALLSTATE



"Hearsay's the only solution that provides a unified experience for advisors across all channels, fully compliant and integrated with Salesforce CRM. Our advisors love it."



MARK MADGETT
SVP, HEAD OF DISTRIBUTION
NEW YORK LIFE



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

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ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the client experience in Wealth Management, Insurance and P&C with compliant digital communications and workflow solutions. Over 150,000 advisors and agents at the world's largest financial services and insurance firms leverage Hearsay to engage with customers and build stronger relationships to grow their business.

With Hearsay Cloud for financial services, advisors and agents provide real-time, personalized and seamless client experiences across the right channel - social, texting and mobile - at the right moment. Automated, pre-built industry workflows for insurance and wealth management provide one-click actionable suggestions for targeted engagement. Built for the enterprise, Hearsay Systems connects data and every client interaction to corporate CRM systems and digital marketing programs - all on a secure, compliant enterprise-ready platform.

Hearsay is headquartered in Silicon Valley with locations throughout North America, Europe and Asia. Connect on [Facebook](#), [Twitter](#), [LinkedIn](#) and the [Hearsay blog](#).

