

Hearsay Relate Opt-In Best Practices

Disclaimer: Opt-in is not a legal requirement for one-to-one messaging. Hearsay has designed a variety of ways to initiate compliant texting to suit the specific requirements of different organizations.

Hearsay Relate was built with an intuitive workflow that allows for this consent to be received via text. But what happens if the customer never responds to the text? How would you follow up?

With the Opt-In link, your clients can give you their consent to start texting them by clicking on a web link. This allows you to receive consent from multiple communication channels and not be stuck waiting for them to text back.

Scenarios

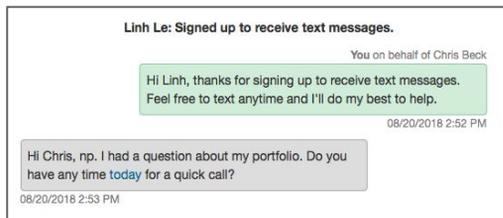
What are some situations where you'd need to use the Opt-In Link?

- 1. Introduction to New Texting Number Email** – It might be disconcerting on the client end to receive a text from an unknown number. To bypass this awkwardness, you can send an introduction email to your new texting number to all of your clients, with the opt-in link included. This way, they'll know that they will be receiving an opt-in text message soon from your new number and they can skip the opt-in text by giving you consent via the web link.
- 2. Pre-Read/Follow-Up to First Meeting** – Before or after your first meeting with a client, odds are you'll send an email. In either of these emails, you can let them know that you can also be reached via text, which they can consent to by clicking on the link. It can quickly be added to your customers' onboarding process without too much work or time spent on your side.
- 3. Follow Up to Pending Opt-In Text** – Sometimes, people just don't respond to texts. Maybe they'll tap into it, tell themselves to respond later, and forget. Some people respond in their heads and forget to actually type in their response. It happens. If it continues to happen via text, then the Opt-In Link gives you an opportunity to follow up via a different communication channel, like email.
- 4. Post On Social Media** – If you want to go for a more aggressive approach, post the link on social media! Customers who didn't respond to your text or missed your email might just catch it on social media. Who knows – you might also see a lead or two trickle in.

How to Use



The Relate Opt-In Link can be found under Account > Share Consent Link. Feel free to copy and paste this link wherever needed.



If you click on the link, you'll be taken to the screen that clients see when signing up to be texted.

Once your customers give consent, they will appear under the Conversations tab with a message that states that they've signed up to receive text messages. You can begin texting them anytime.

Need Help?

As always, you can email our support team at support@hearsaycorp.com if you have any further questions. Feel free to check out our [Help Center](#) for a variety of articles and video resources to get you started.