



Hearsay Relate 2min

You have a new lead: Click to call or text now – Jane Garcia

Compliant Texting & Mobile Calling, Built for Insurance

Hearsay Relate helps insurance firms improve the client-advisor experience by making business communications simple and reliable, while maintaining enterprise-class security and controls. Hearsay has you covered across the compliance spectrum, ensuring regulated advisors and agents meet guidelines from FINRA, SEC and IIROC, while adhering to FCC and TCPA requirements.

Hearsay Relate is a compliant text and high-quality cellular voice solution. Your agents can connect to their clients from their desktop or any mobile device. More than just text and mobile calls, Relate turns your agents' devices into mobile productivity centers. AI-based automation, team delegation and workflows help agents service clients faster, drive more in-person meetings and save time converting prospects to clients.

Relate scales as you grow and automatically captures agent-client interactions and all related metadata – with no effort from your agents – creating deeper insights across the organization.

BENEFITS

- Risk mitigation with enterprise-class security, controls and compliance.
- Support all deployment models – BYOD, CYOD and COPE – by providing a separate work number.
- Stop dropping calls; carrier-grade cellular voice delivering high-quality calls.
- Easy integration with your CRM and other core enterprise systems, like archiving.
- Quick implementation, deployment and onboarding for rapid time to value.
- More than text & voice – a mobile productivity center for agents.
- Improved client and agent experience with automation, delegation & smart workflows.

OTHER PRODUCTS



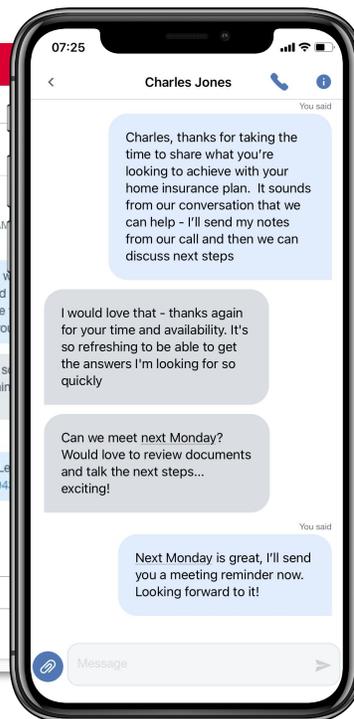
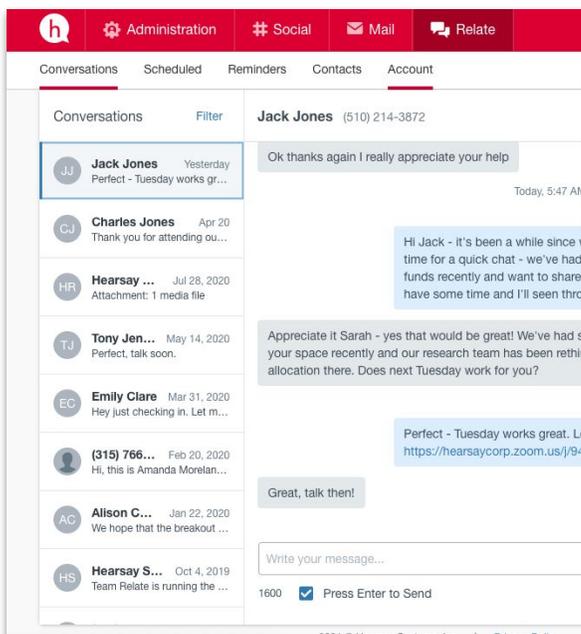
Social



Sites



Actions



98%

Client response rates on text messaging - compared to *only 20% on email*



AGENT PRODUCTIVITY

- Rapidly respond to client outreach with automatically generated smart messages
- Schedule meetings directly from a text with calendar integration
- Delegate service-related text messages to team members; scale communications across your entire book of business
- Bulk schedule and personalize common text messages, like billing reminders

ENTERPRISE INTEGRATION-READY

- Easily integrate with your CRM and other core enterprise systems
- Seamlessly archive with your existing vendor

SECURITY, COMPLIANCE & SUPERVISION

- Drastically reduce compliance review time and resources with contextual supervision
- Ensure all messages are encrypted in transit and at rest
- Seamlessly integrate text conversations into existing enterprise archiving systems
- Set controls, supervision and record-keeping to address regulatory requirements to address the TCPA and regulatory requirements from the FCC
- Prevent bad texts from going out in the first place with Forbidden Keyword Lexicon Blocking
- Review lexicon and activity-based alerts through a Universal Supervision Dashboard

ENTERPRISE MOBILITY STRATEGY

- Support your BYOD, CYOD and COPE model
- Integrate leading MDM/EMM platforms

ARCHIVE INTEGRATIONS



EMM INTEGRATIONS



“Hearsay Advisor Cloud has aligned marketing, sales, and IT to maximize field productivity and client loyalty.”



TELISA YANCY
CHIEF MARKETING OFFICER
AMERICAN FAMILY

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 human-client experience in financial services. The Hearsay Client Engagement Platform empowers over 200,000 advisors and agents to authentically and intelligently grow business relationships by proactively guiding and capturing the last mile of digital communications. The world's leading financial firms—including Allstate, New York Life, Morgan Stanley, and Charles Schwab—rely on Hearsay's SaaS platform to scale their reach, optimize sales engagements, and deliver exceptional client service in a consistent and compliant manner. Hearsay is headquartered in San Francisco, with locations throughout North America, Europe and Asia.

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