

Evaluation Checklist: Compliant Texting Solutions

When you're in the due diligence phase of selecting a texting provider, a side-by-side comparison can be extremely useful. Use this handy checklist to see how Hearsay stacks up against other solutions you're evaluating.

	OPTION A	OPTION B	OPTION C
ENTERPRISE COMPARISON			
Official Salesforce & Microsoft Dynamics integration and partnership			
API extensibility for integration with core systems			
Core API toolkit			
Dedicated admin portal			
Enterprise scale and credibility			
Platform built for expansion (additional integrated digital services offered, like text and social)			
Referenceable enterprise customers			
Exclusive focus on financial services			

	OPTION A	OPTION B	OPTION C
COMPLIANCE COMPARISON			
Contextual (threaded) supervision designed to ensure FINRA compliance			
Integrate with any archiving partner			
Official Proofpoint partnership			
Flexible TCPA opt-in flow			
Enterprise-tested compliance and supervision			
Retain complete ownership of your data			
Establish your own disclosure requirements - negative consent, positive consent and disclosure messages/links			
Maintain complete control over user accounts - oversee, monitor usage, de-activate or terminate accounts			
Block risky texts before they are sent with a Forbidden Keyword Lexicon			
Captures and logs all voice call and text metadata			

	OPTION A	OPTION B	OPTION C
ADVISOR EXPERIENCE COMPARISON			
Optimized for advisors & agents			
Teaming through Delegated Access (multiple people can work on the same number/workspace)			
Pre-schedule texts			
Broadcast/group messages			
Affordable voice minutes			
Native cellular voice for high-quality calls			
Click-to-call, Click-to-text triggered actions			
End-user support & client services specific to advisors/agents			
Onboarding tutorials			
Ease of advisor/agent onboarding (ability to sign up and begin texting immediately)			
Mobile app			

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.



To drive customer loyalty and improve billing response, take action today. Contact us at:

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