Secure Hearsay Relate Deployment

API & EMM GUIDANCE

Enterprise financial services and insurance firms are looking for security and compliance above all else in their advisor text messaging deployments. To that end, there are multiple ways to deploy Hearsay Relate securely in an enterprise environment.

USE HEARSAY APIs

Hearsay APIs are highly extensible and make current or future integration with CRM and other core business applications easy. Of all the ways to deploy Relate, APIs also provide the most rapid time to value, with minimal testing or integration work needed as there are no 3rd party products involved. Customers can be up and running in as little as a week with our core APIs as compared to the months it might take to get approvals when doing 3rd party validation and testing. This is a critical value driver especially when a program such as Relate is rolled out to the field at large.

Perhaps most importantly, APIs address the same critical security functionality as Enterprise Mobility Management (EMM) applications, such as deleting users and workspaces, wiping lost or stolen devices, or providing a secondary authentication for inactive sessions. Hearsay brings biometric authentication on the device for the Relate application. This allows for an extra level of security and can be configured to kick in after a preset amount of time. By using APIs, you also avoid the need to revisit your EMM setup every time there is a platform update (either from the iOS or the Android ecosystem) since Hearsay Relate will work turnkey with those updates.

Texting is crucial to business communications. It's become the most common way for people across generations to communicate — and the top reason affluent clients fire an advisor is lack of communication. Firms have an opportunity not only to play compliance "defense" with texting and mobile call follow-ups but also to transform their business outcomes.

STANDARDS-BASED EMM

If you choose to deploy Relate through an EMM, we strongly recommend a solution built using a standards-based approach (per app VPN). We are supportive of and work with the open standards of the growing AppConfig community. The Hearsay Relate for MobileIron is an app on the MobileIron Marketplace that follows such practices. We integrate with any EMM, MDM or MAM provider that is standards-based.

TOP PROVIDERS INCLUDE

Microsoft Intune   BlackBerry

MaaS360 airwatch MobileIron
by Fiberlink, an IBM company   by vmware

Adoption rates improve significantly for customers who use Hearsay's API solution. However, we know there are custom wrappers and hosting binaries used in EMM that some organizations prefer. Our solution scoping team can assist in these scenarios where custom apps need to be maintained.

Find out how Hearsay can help your advisors and agents grow business compliantly:

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ABOUT HEARSAY SYSTEMS

Hearsay Systems offers the Hearsay Advisor Cloud for financial services, empowering advisors to efficiently and compliantly use social media, websites, text and email to engage with customers, build stronger relationships and grow their business. Its prescriptive technology processes and prioritizes data from across digital channels and data systems, providing actionable suggestions for advisors on how they should engage with clients next. Built for the enterprise, Hearsay connects these advisor-client interactions and data to corporate CRM systems and digital marketing programs, and provides efficient compliance supervision and review workflows – all on a secure, enterprise-ready platform.

Hearsay is used by more than 150,000 advisors and agents at the world's largest financial services and insurance firms. The company is headquartered in Silicon Valley with offices throughout North America, Europe and Asia. Connect on Facebook, Twitter, LinkedIn and the Hearsay blog.

hearsayrelate.com