

INDUSTRY BRIEF

Financial Services



Text messages have revolutionized how we communicate, quickly becoming our go-to channel for daily use. SMS Marketing Services helps you tap into this power for your financial institution, allowing you to effectively reach your members. But our software goes further than common mass texting solutions by helping you automatically increase revenue by boosting customer satisfaction with service, simplify the fraud prevention process, market your services more effectively, and streamline operations with powerful automation.

USE CASES

01

Boost Customer Satisfaction

SMS Marketing Services is the most powerful and versatile text messaging platform for the finance industry, helping you keep customers for life by improving their satisfaction with your

- Our Two-Way Texting allows customers to communicate with you without the risk of phone tag or buried emails. Better yet, you can do this using your existing landline number, so you don't have to use your personal number to text for business.
- SMS Marketing Service's unique Smart Targeting feature allows you to send only relevant alerts to customers based off of information you gather, minimizing opt-outs.
- Send surveys via texting instead of email, and receive 7.5x more completed surveys.

02

Streamline Operations

SMS Marketing Service's automated platform is built from the ground up to help your Financial Institution efficiently communicate with customers.

- Use our intelligent Text Bot to automatically answer questions. This is perfect for directing customers to the correct specialist or answering frequently asked questions automatically.
- Send voice, email, social, and SMS broadcasts to all of your members from our integrated platform. Whether it's sending out mass messages or sending customers individual alerts on low balances or suspicious activity on their accounts, you'll be able to reach them quickly on their preferred channel.

USE CASES

03

Market More Effectively

Getting the word out on your loan programs or other financial services can be hard. But with texting's 98% read rate, you can use it for:

- Promoting downloads of your mobile app via a link embedded in your texts.
- Sending targeted loan offerings and include links to more details, current rates, etc.
- Promoting keywords that build your contact database or promote downloads of your mobile app. For example, ask customers to text "HomeLoans" to your short code to collect their mobile number and send them your current rates.

04

Simplify Fraud Prevention

Our platform gives two powerful ways to prevent fraud and help your members feel protected, boosting their trust in your services.

- Use our API to integrate with your system, so you can send automated SMS alerts for unusual charges.
- Two-Factor Authentication adds another layer of security for creating an account, authenticating logins by requiring a one-time passcode that's either emailed or texted to your users when suspicious activity is detected.

LIFECYCLE ENGAGEMENT

SMS Marketing Services allows you to communicate with subscribers throughout every stage of their experience, from signup to engagement and volunteer efforts. For example:



1

Collect new contacts using **mobile keywords** and online sign-up tools.



2

Automatically track behavior and gather relevant information about clients by asking questions and automatically capturing their responses.



3

Our **Smart Targeting** tool automatically filters distribution lists based on subscriber's interests and behavior, so you send only relevant alerts.



4

Send **mass notifications** to customers with urgent alerts including timely investment alerts.



5

Answer financial questions via **two-way landline texting** using your existing business phone number, so you can text for business without exposing your personal mobile number.



6

Automatically send timely reminders for things like final notice payment dates, or renewals.



7

Automatically answer common financial or operations questions using our **intelligent Text Bot**.



8

Set **access rights** to contacts and features in our system for each employee to make sure your customer **data is secure**.



9

Send **text surveys** to gather feedback and improve your operations. Our surveys branch according to your customer's responses, allowing you to ask deeper and more relevant questions.

UNMATCHED CUSTOMER SERVICE

We offer onboarding and training to make sure you can get the most out of our messaging solution. In addition, our account management team will help you implement automation and lifecycle engagement into your communication strategy. Our amazing support team is ready to help 365 days a year, with a 1 hour average support response time during business hours.



365-day
Technical Support



1-hour
Initial Response Time



9.5/10
Customer Service Rating

