



USER EXPERIENCE



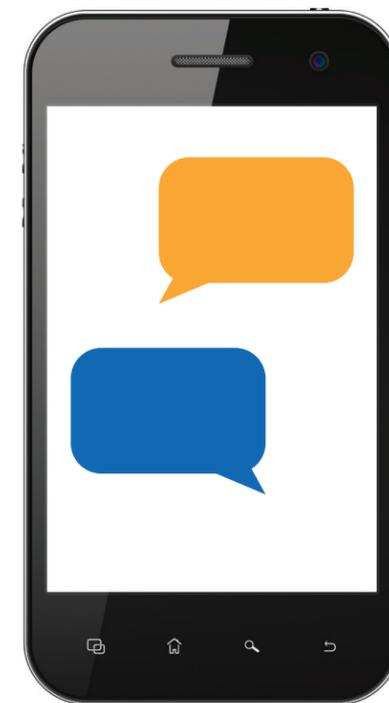
Compliant Text Messaging Solution

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Why was MyRepChat created?

MyRepChat was created by an advisor who, through no fault of his own, received text messages from his clients. He repeatedly told them it was not an approved way to communicate and he could not respond or interact through a text; however, they persisted. There were other solutions on the market; however, none of them were anything more than a texting tool that made compliance happy, but did little in the way of building excitement. MyRepChat was created to be a communications platform, not just a texting tool and the features and integrations built within are proof that there was an advisor involved in the development. No one knows what advisors need more than an advisor, and no tool out there today can do what MyRepChat can do.



WHY TEXTING?

- Consumers are **more likely to open text messages** before any other form of mobile communication.
- The average response time for a legitimate email is about 90 minutes, compared to **90 seconds for a text message.** (CTIA.org)
- SMS produces **engagement rates 6 to 8 times higher** than retailers normally achieve via email marketing. (Mobile Commerce Daily)
- **79%** of mobile phone users check for new messages **within 15 minutes of waking up.** (IDC/Handyman Marketing)
- #1 reason affluent clients fire their advisor: **lack of communication!**



Features + Benefits

TEXT AND GROUP MESSAGING Birthdays, anniversaries, events, appointments, and more! With our platform, clients will never have to download an app or software to communicate with you. With group messaging, each contact receives an individual message.

DIGITAL ASSISTANT Scheduled, automated, and efficient client communication—leaving you more time to do what you do best.

DOCUMENTS AND IMAGES Sometimes clients choose to send things like documents or images through a text. MyRepChat supports this content inbound and outbound.

IMPORT YOUR CONTACTS Easily import your contacts from your CRM or your mobile phone and begin texting immediately. Our CRM integrations also allow you to have your conversations instantly archived in your CRM.

KEEP YOUR NUMBER You can keep your existing landline number and have text messages to that number flow through MyRepChat. Clients only need to know one number!

AUTO-FORWARD If you don't have a landline number to text enable, we can create a text number for you and auto-forward all calls to a number of your choice. The best part? You can change the number it forwards to at any time.

SCHEDULING FUNCTION You can plan and schedule messages in the future and create recurring messages to celebrate important dates. Push send once, and be worry-free while your marketing is executed!

INTEGRATED V-CARD With MyRepChat, getting your contact information into the hands of your clients and prospects has never been easier. Your V-Card can be requested at will by clients and prospects or you can hit one button and send it. The best way to ensure your business card is never lost is to make sure it is saved as a contact immediately.

CUSTOMIZABLE WORKFLOWS MyRepChat allows users to create customizable workflows. With these, a user can set their own rules to speed up the time it takes a client to receive a response. If a client texts a specific word or message, you can now train your system to automatically respond with your desired message.



USER BENEFITS

Know your messages are delivered

Increase personal touches with your clients

You are easier to connect with

Your staff can manage the entire process

Automated responses

Much more!

Convert More Prospects to Clients

KNOW YOUR AUDIENCE

According to the CDC:



43% of households have a landline¹

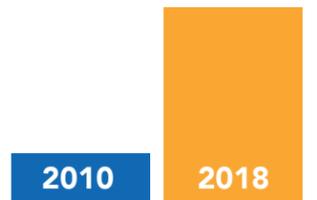


53% of households are cell phone only¹

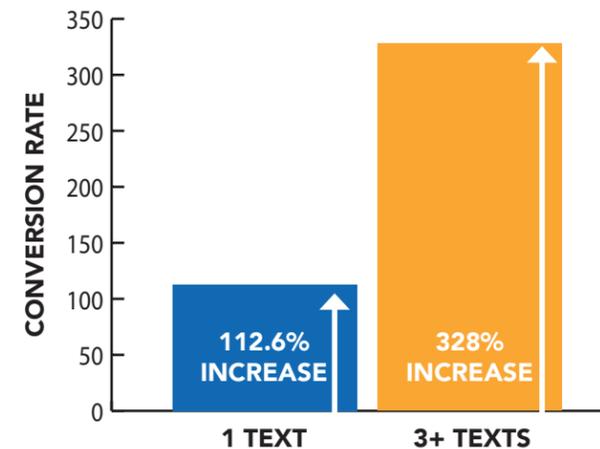


According to MarketingCharts, the number 1 activity on a smartphone is **Messaging**

Smartphone ownership has grown from **20% of the US population to 80%** from 2010 – 2018²



CAN A TEXT REALLY CONVERT A PROSPECT TO A CLIENT?

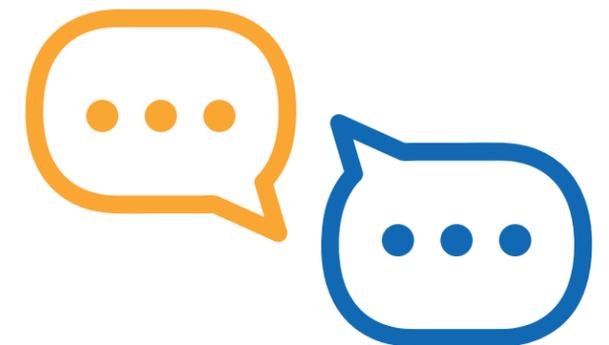


Texting a prospect after initial contact can increase conversion rates by

112.6%.³

Sending 3 or more follow-up text messages to prospects increases conversions by as much as

328%.³



¹ <https://www.statista.com/chart/2072/landline-phones-in-the-united-states/>
² <https://www.statista.com/statistics/201182/forecast-of-smartphone-users-in-the-us/>
³ Leads360, Crazy Egg

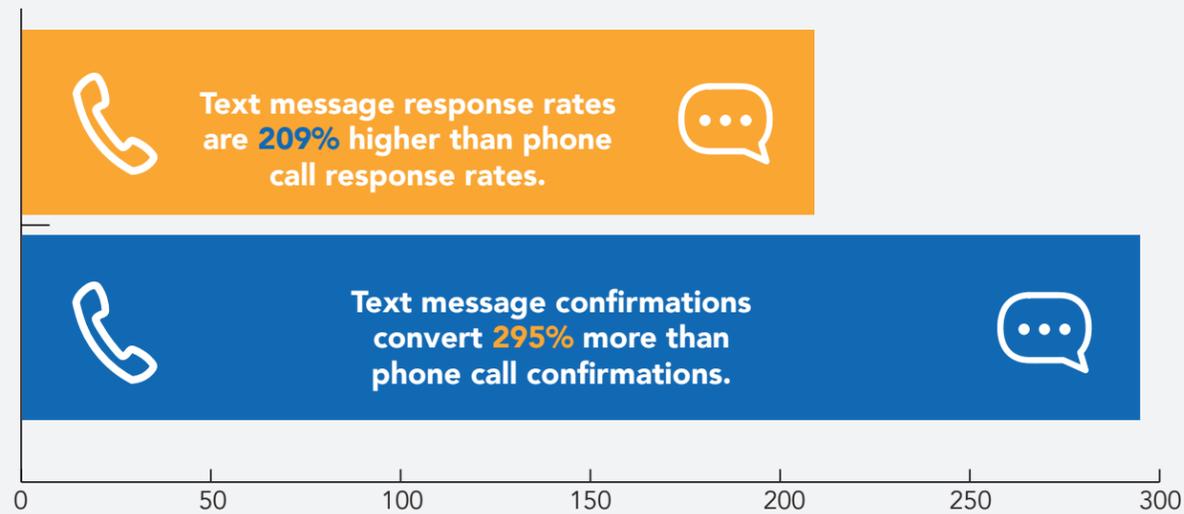
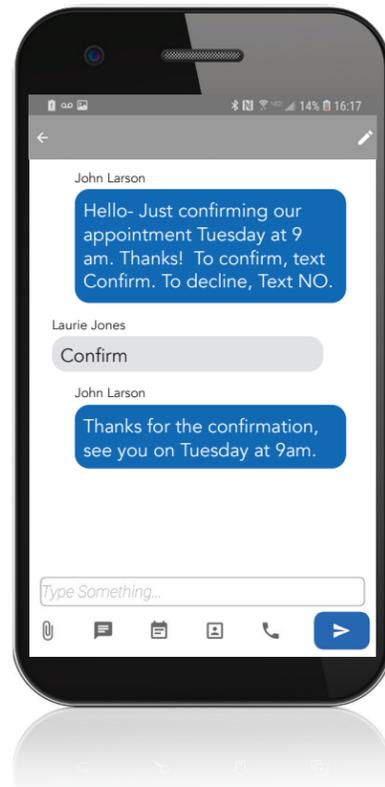


Don't forget what's important

According to Apptoto, once an appointment is confirmed, there is a **90%** chance it will not be rescheduled.



✓ Preferred for scheduling, confirming or changing appointment.



Increase Client Satisfaction

According to a study done by IRIS, One of the biggest reasons clients leave their financial advisor is because of a lack of communication.¹

What's the best way to connect with my client?



EMAIL?

- Email open rate for a Financial Advisor is **15.36%**²
- And, on average, it takes **90 minutes to respond to an email**³



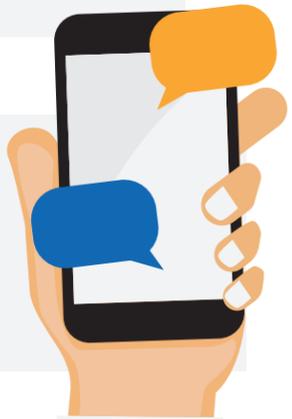
PHONE?

- A staggering **26.3 billion** robocalls were received in the U.S. in 2018, up 46 percent from the previous year⁴
- **48% of calls are not answered.**⁵



TEXT?

- And, on average, it takes **90 seconds for someone to respond to a text.** Text messages have a **98% open rate**⁶
- Text messaging is the **#1 preferred form of communication**⁷



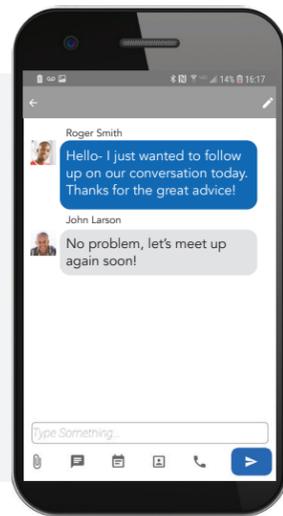
1 <https://www.iris.xyz/grow/development/5-reasons-clients-leave-their-financial-advisors>
 2 https://knowledgebase.constantcontact.com/articles/knowledgebase/5409-average-industry-rates?lang=en_US
 3 <https://www.campaignmonitor.com/blog/email-marketing/2019/01/roi-showdown-sms-marketing-vs-email-marketing/>
 4 <https://www.foxnews.com/tech/americans-hit-with-26-3-billion-robocalls-last-year-causing-some-to-not-answer-their-phone>
 5 <https://bgr.com/2019/01/29/smartphone-usage-statistics-new-data/>
 6 Mobile Marketing Watch
 7 Independent, Gallup, DialMyCalls



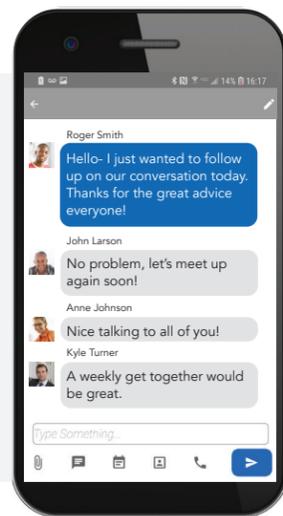
Ten4

Simple. Collaboration.

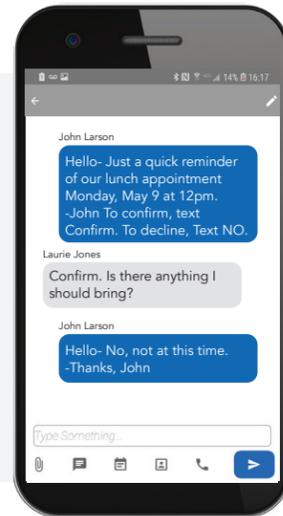
MyRepChat is intended for communication with clients, but what about communication with colleagues? Ten4 allows for internal communication, and best of all, it's built into MyRepChat.



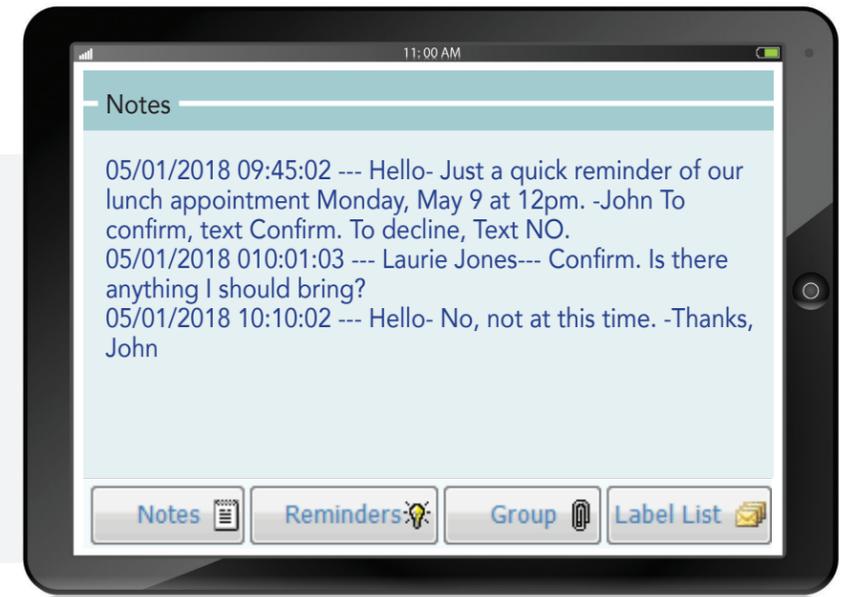
One to One



One to Many



Your Phone



CRM Archived Notes

- Collaborate on a project
- Communicate with a department
- Chat with a colleague
- Share files, videos, images, GIFs
- Integrates with Archiver so messages are captured and stored
- Access Ten4 from your mobile phone or computer



Integrates with your CRM

Our CRM Integrations allow users to avoid the painstaking process of duplicating contacts and the time sensitive process of storing notes.

CURRENT INTEGRATIONS:





Archiving + Partnerships

Discover how a partnership with MyRepChat can grow your business.

Nobody wants to add a new archiving relationship to their business. With MyRepChat you don't have to. MyRepChat currently integrates with the following organizations to facilitate the capture, review, and archiving of all MyRepChat text messages.

Please check myrepchat.com for the most up-to-date integration partners. Our integration partners grow continuously.

We've currently established direct archiving relationships with the following organizations:

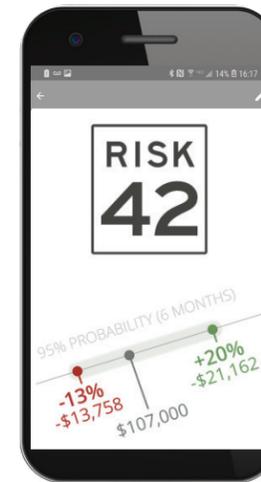


Other Important Highlights

BUILT IN VCARD

Do you hand out business cards? Do you know what happens to those cards? **88% of business cards are thrown away in less than a week.**³

A built in vCard makes it easier for a client or prospect to save your contact information.



Riskalyze

What is your clients risk score?

WHY IS THE RISKALYZE INTEGRATION SO VALUABLE?

- Email open rate for a Financial Advisor is **15.36%**¹
- Text Message **open rate is 98%**²
- Risk assessment can be sent to the client right from MyRepChat
- Risk score populates in the client details within MyRepChat

FMG SUITE + MARKETING PRO

Delivering content just got easier when it's delivered via text message

- World class content
- Pre-approved
- Able to be monitored



¹ https://knowledgebase.constantcontact.com/articles/knowledgebase/5409-average-industry-rates?lang=en_US

² Mobile Marketing Watch

³ <https://conveyapp.io/blog/12-stats-that-will-convince-you-to-stop-using-paper-business-cards/>

What Questions to ask when considering a Texting Solution

Choose the right Partner

Don't be fooled by the big names and the well-crafted sales pitches. Start by asking the right questions and getting the answers you need to feel comfortable.

Not having a solution is no longer an option. Make the right decision.

ADVISOR QUESTIONNAIRE ✓ = YES

	MyRepChat		
Can I use my office number for business texting?	✓		
If not, can I have a number with my area code?	✓		
How long is the set-up process?	minutes		
Does it integrate with my CRM?	✓		
Can my assistant log in using their own credentials?	✓		
Can I schedule messages for varying frequencies?	✓		
Does it have a vCard?	✓		
Can I create custom templates?	✓		
Can I create custom auto responses?	✓		
Can I send and receive images and emojis?	✓		
Can I send and receive documents?	✓		
Can I make phone calls directly from the app?	✓		
Can calls be recorded?	✓		
Can recordings be transcribed?	✓		
Is there an out of office feature?	✓		
Can I update my billing in the app?	✓		
Are my messages kept separate from others?	✓		