DIRECT CONNECT™

salesforce
AppExchange Program
PARTNER

What is the problem?

- I am unsure when I can text a prospect of a policyholder.
- I don't know what kind of permission of consent we have on file for each prospect or policyholder.

*Also applicable for phone & email if required.

Why is it relevant now?

- 92% of customers prefer to communicate with brands via text
- Customers are expecting brands to be proactive and keep them informed
- Legal requirements surrounding automated communications is constantly increasing and can vary significantly by State
- The number of text related lawsuits is rapidly growing due to incomplete or non-existent opt-ins

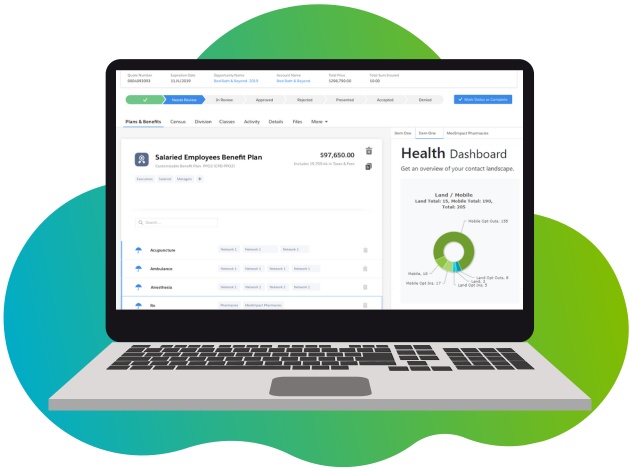
How do we fix it?

- Opt-in collection is built into your existing platform and workflows and tagged within the contact forms and records
- Referenceable consent on file for each customer
- Consent data can be pushed across your organization and provided to other communication providers as needed

Who can use it?

- Organizations that are using Sales Cloud or Service Cloud
- Organizations that have policyholder or customer data stored within the contact record

*Integration with Marketing cloud is not available through AppExchange but can be setup using a simple API



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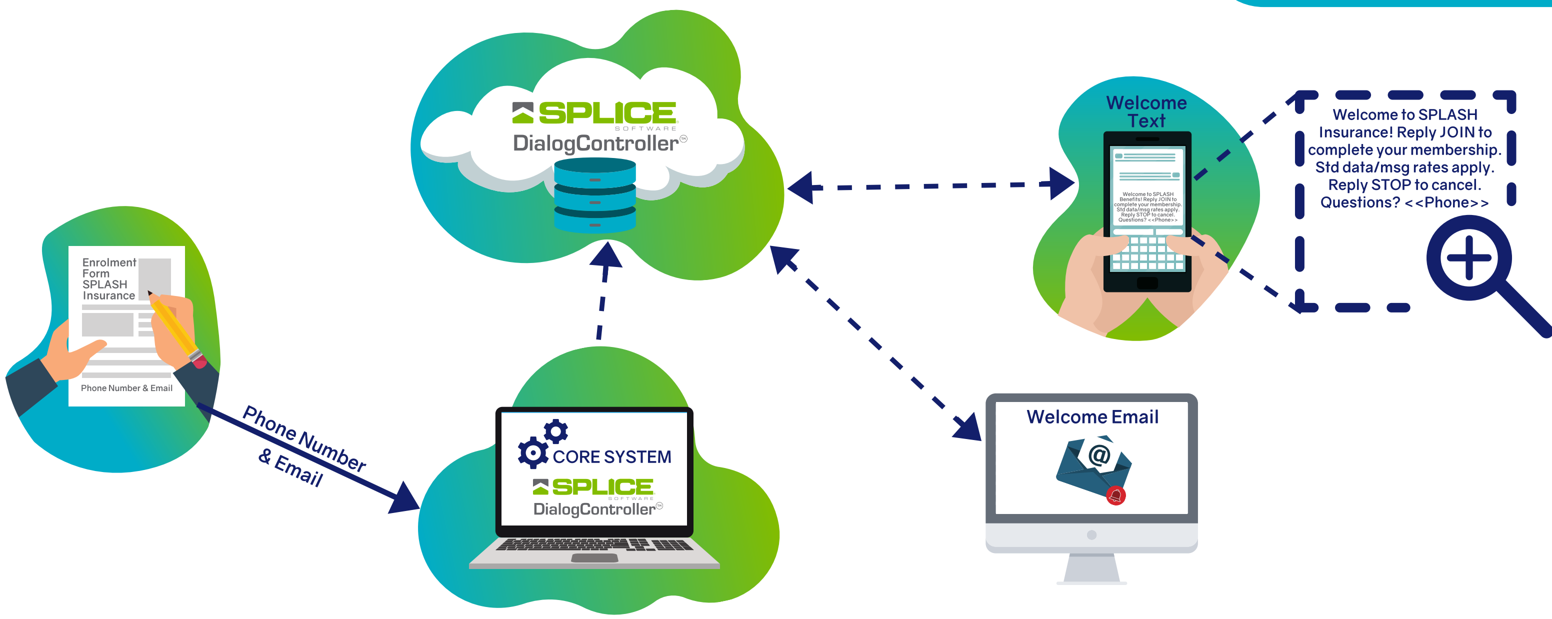
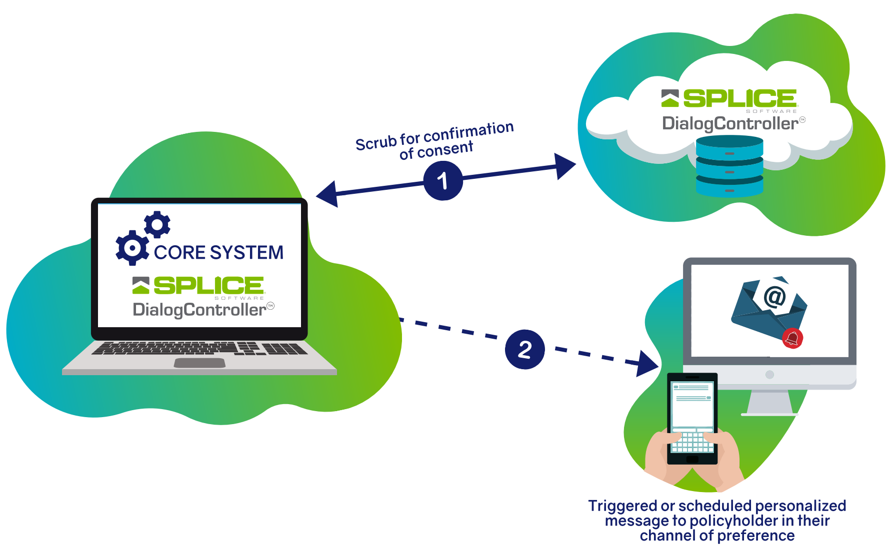
When can I use it?

- At the time of data entry within the contract record
- By doing a bulk import of customer data



Implementation:

- Fully integrated with Salesforce Sales & Service clouds
- Setup assistant framework and guided wizard available for seamless integration - API key included
- Any Salesforce Administrator can select workflows for automate and opt-in capture



Connect:

Connect directly with customers in the channels they prefer about:

- Marketing & promotions
- Customer support
- Claims updates
- Policy renewal
- Quote follow-ups
- Policy updates & notifications

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