

Don't use your personal cell phone number for business use. *Why?*

1

There is no encryption on the users device to ensure the integrity and security of the messages

2

Text messages on a phone are considered notes and may be a violation of Protocol rules

3

There is no separation of personal and business communication providing a user the ability to enable out of office or auto responses for any reason

4

Does not allow a users assistant to support in any way

Things to consider when using a "White List":

White List's provide a user the ability to create a list of contacts that are essentially "off limits" when it comes to capture, review, and archiving. If you choose to allow this, consider the following:

- Firms will need to update their policies and procedures to detail how they ensure that clients and/or prospects don't get put on the white list.
- Firms will need to update their policies and procedures to detail how they ensure active monitoring of the names and numbers on the white list to ensure a non-client or non-prospect has not become a client or a prospect since being added to the white list.
- Firms will need to update their policies and procedures to detail how they ensure clients or prospects don't get added to the white list, especially in situations where the client and/or prospect may have a complaint and may express their concerns in a text message.

