

# MyRepChat Communications Launch Plan

## Communications Timeline – When to send out your message



The purpose of this document is to provide a communications roadmap to ensure a successful launch of MyRepChat.

	What you should say via EMAIL/INTRANET	What you should say via TEXT
T-14 DAYS	<p><b>Subject: Is texting in our business a real thing?</b> Are you tired of sending emails to clients and prospects and never getting a response? Did you know that emails have only a 21% open rate? Did you know the average person receives 121 emails per day? <b>MyRepChat</b> can help you finally be able to utilize text messaging to communicate with your clients and prospects. <b>Join a live demo with the creator, Derrick Girard, CFP, AIF, NSSA to see how MyRepChat can change the way you interact.</b></p>	<p>XYZ Financial is making a difference for you and your clients. Text messages have a 99% open rate, emails only have 21%. An efficient practice starts with efficient communication. Respond to this text with MyRepChat to learn more.</p>
T-10 DAYS	<p><b>Subject: Client interaction is changing</b> Almost 50% of Americans don't have a landline phone number. Did you know that a text message has a 209% higher response rate than a phone call? <b>MyRepChat</b> was built with this in mind. Clients don't know your number, to them, you are a contact saved in their phone. MyRepChat simplifies the communication process. <b>Join a live demo with creator, Derrick Girard, CFP, AIF, NSSA and see how MyRepChat can increase the responsiveness of your clients and prospects.</b></p>	<p>Text messages have a 209% higher response rate than a phone call. You don't need your phone to text with clients. Respond to this text with MyRepChat to learn more.</p>
T-5 DAYS	<p><b>Subject: Your clients want to text</b> Did you know that consumers prefer a text message for things like scheduling, rescheduling and confirming meetings? Your client's text every day. In fact, the average adult spends 23 hours a week texting. <b>MyRepChat</b> integrates with your CRM, which means client Communication is automatically stored in the client notes. And, using MyRepChat, you can schedule messages, group messages, and even auto responses.</p>	<p>Text messages have a 209% higher response rate than a phone call. You don't need your phone to text with clients. Respond to this text with MyRepChat to learn more.</p>
T-1 DAY	<p><b>Subject: Both clients and advisors text!</b> How much time do you or your staff spend scheduling, confirming, and rescheduling appointments? What was business like before email? Refusing to adapt to current technology to engage with your clients can mean the different between generational planning and planning for generations. <b>MyRepChat is finally here! Please join one of the three webinars being offered to learn how MyRepChat works, see a live demo, and find out how to get signed up for a one of a kind communications tool built by a fellow advisor.</b></p>	

## T-14 DAYS

### Observation

Up until this point, advisors have been told they can only use communication channels such as Email, Telephone Calls, and possibly Social Media to communicate with clients. For many, they have built their business and communication tactics around these methods. Adding another communication channel for some may be a challenge and for others, text messaging is something they've been waiting for.

### Purpose for T-14 DAYS Communication

- Highlight challenges to traditional communication channels
- Introduce texting for business purposes
- Introduce MyRepChat as solution adopted by the company

### Objective of T-14 DAYS Communication

- Drive interest and attendance in upcoming webinars to learn about MyRepChat

### Summary

We need to build momentum when it comes to creating a great launch and the goal is to drive attendance to the live demos. Too many times advisors will predetermine if they are interested in something based on what they think it is. Challenging them to reconsider their current communication methods and helping them understand that text messaging is truly an effective business communication channel.

Lastly, MyRepChat is a communications tool, not a texting tool. Don't feel as if you have to sell MyRepChat or the adoption of, rather the focus is to get people to RSVP to an upcoming webinar.

## T-10 DAYS

### Observation

Now that we have begun to educate advisors on the effectiveness of traditional communication channels, it is time to help them understand how consumers want to communicate today. Response rates to various channels of communications differ greatly and highlighting some key statistics can be a great lead in to the upcoming webinars.

### Purpose for T-10 DAYS Communication

- Use statistics to highlight challenges every advisor faces when attempting to communicate with clients and prospects
- Highlight effectiveness of text messaging with consumers today
- Reiterate texting for business purposes
- MyRepChat as the solution that makes communication easier and more effective

### Objective of T-10 DAYS Communication

- Drive attendance for those that have not yet RSVP'd to an upcoming webinar
- Generate more excitement for those that have already RSVP'd to an upcoming webinar

### Summary

To many, text messaging is something you do with your friends and family and the use of text messaging for business hasn't been something they've given a lot of thought too. Regardless of their interest to this point in texting, it is important that they understand that they cannot ignore the effectiveness of a text message as compared to traditional communication channels.

Lastly, MyRepChat is a communications tool, not a texting tool. Don't feel as if you have to sell MyRepChat or the adoption of, rather the focus is to get people to RSVP to an upcoming webinar.

## T-5 DAYS

### Observation

If asked, most people would think that texting is something that is done by younger generations. Most are surprised to know that on average more people over 70 use their cell phones to text than Millennials. Texting is not just something done by younger generations and in fact the speed of a text is exactly why it is so widely embraced.

Advisors will say things like, “my clients don’t text”, or “my clients are older, and they don’t want to text”. It is critical that they understand that this is not the case.

### Purpose for T-5 DAYS Communication

- Highlight what consumers have said they prefer to use a business text message for
- Identify how much time adults spend texting on a regular basis
- Introduce the integrations MyRepChat has to build more interest and intrigue

### Objective of T-5 DAYS Communication

- Drive attendance for those that have not yet RSVP’d to an upcoming webinar
- Generate more excitement for those that have already RSVP’d to an upcoming webinar

### Summary

When advisors don’t want to change, they often times speak on behalf of their clients. Derrick Girard, the creator of MyRepChat and a consultant for advisors for many years knows this all too well. For many advisors, it’s easier to speak on behalf of their clients rather than to change their behavior.

Advisors are surprised every time they adopt MyRepChat when they learn which clients prefer text and use text as a form of communication the most.

Stress the fact that business text messages do not require messages to go through a cell phone. This can often times be enough to get someone to RSVP to a webinar.

## T-1 DAY

### Observation

Confirming appointments is critical for advisors and their staff and allotting time to do so can be a challenge given the workload daily. Also, many older advisors will be the first to resist the idea of a text messaging for business; however, many of them can remember when email wasn't as widely used or effective.

### Purpose for T-1 DAY Communication

- Remind advisors of the benefits of adapting to and adopting new technology
- Highlight the challenges and the importance of meeting confirmations
- Remind advisors of the constant challenge of engaging the children of their clients

### Objective of T-1 DAY Communication

- Drive attendance for those that have not yet RSVP'd to an upcoming webinar
- Generate more excitement for those that have already RSVP'd to an upcoming webinar

### Summary

We are one day away from the launch of MyRepChat. At this point, many of the people interested in learning more should have already signed up for one of the webinars; however, many that have not may be inspired to based on this round of communication.

Again, don't feel as if you have to sell MyRepChat or the concept of texting for a business purpose. The goal is help advisors understand that MyRepChat is not just a texting tool, rather a communication tool that makes communication with clients easier and more effective.