

Introducing **Compliant Business Texting to Your Clients**



Well done! You've been using MyRepChat with a handful of clients and are feeling good about your MyRepChat skills. Now it's time to introduce MyRepChat to your client base.

Be sure your office team is ready to support your texting and that you've looked at the office workflows for texting. Important topics to consider:

- Who in the office sees/responds to the texts?
- Is your CRM integrated for notes to automatically show there for your team to see?
- How to get your clients to use your new MyRepChat number
- How do we handle a client who sent a text to my personal cell phone?
- Reminder – Risks of business texting from a personal number
- Best practices – Best practices when texting in your business

There are a few recommended methods for introducing MyRepChat to your client base.



Personal Introduction

Every business has key clients and influencers. Take the time to call out to these important relationships and introduce your compliant business texting capability. Tell them the texting number, what type of communication is appropriate or not, and send them your electronic business card (vCard) to save your business contact in their phone.



Text Introduction

Prepare an informative introduction text for your clients. Tell them about your new compliant business texting capability and what type of communication is appropriate or not. Be sure to send them your electronic business card (vCard) to save your business contact in their phone.

Note: Some firms have Positive Consent enabled. If so, the first action you will take is to send the Positive Consent message to the Contact. Once they Accept, then you can openly text.

Understanding Positive Consent

Positive Consent sent to your Personal Number



Email Introduction

This is a helpful addition to complement with the prior two methods. Your firm may have regular client communications where you can introduce the new texting capability or perhaps you want to email this as a dedicated topic to clients.

- Tell them about your new compliant business texting capability and what type of communication is appropriate or not.
- If you plan to send an introduction text, tell them the number it will come from and what it will say so there are no surprises. Let them know you will also send your vCard and tell them to save that specifically as your business name in their contacts.



- Why? Because friends become clients and clients become friends. They need to have you as a separate contact for business versus personal text communication. No one wants their personal texting captured for the firm monitoring and archiving requirements!

Sample Email Content

What if our firm requires positive consent? This is a great opportunity to clearly tell clients what to expect and how to opt into texting with you.

- Our firm requires that you opt into texting with me.
- You will get a text from **this number** that says this **"your firm's positive consent language"**.
- Please text back to the same number with only the word "Accept". (Please do not send it my personal cell number!)
- Once you accept I will send my electronic business card. Save my business contact information separate from my personal contact with personal cell number.
- Only use this number for business related texting such as....



Additional Resources

[Getting your clients to text your new MyRepChat number](#)

[How to get your clients who have texted you before to learn your new MyRepChat Number](#)

[Texting with Clients and Prospects over 50](#)

[Texting with Clients and Prospects from 35 to 50](#)

Off you go to compliantly texting with clients and streamlining your business communications!

