

Text Messaging for Financial Services

A PRACTICAL GUIDE
FOR USING TEXTS IN
YOUR BUSINESS





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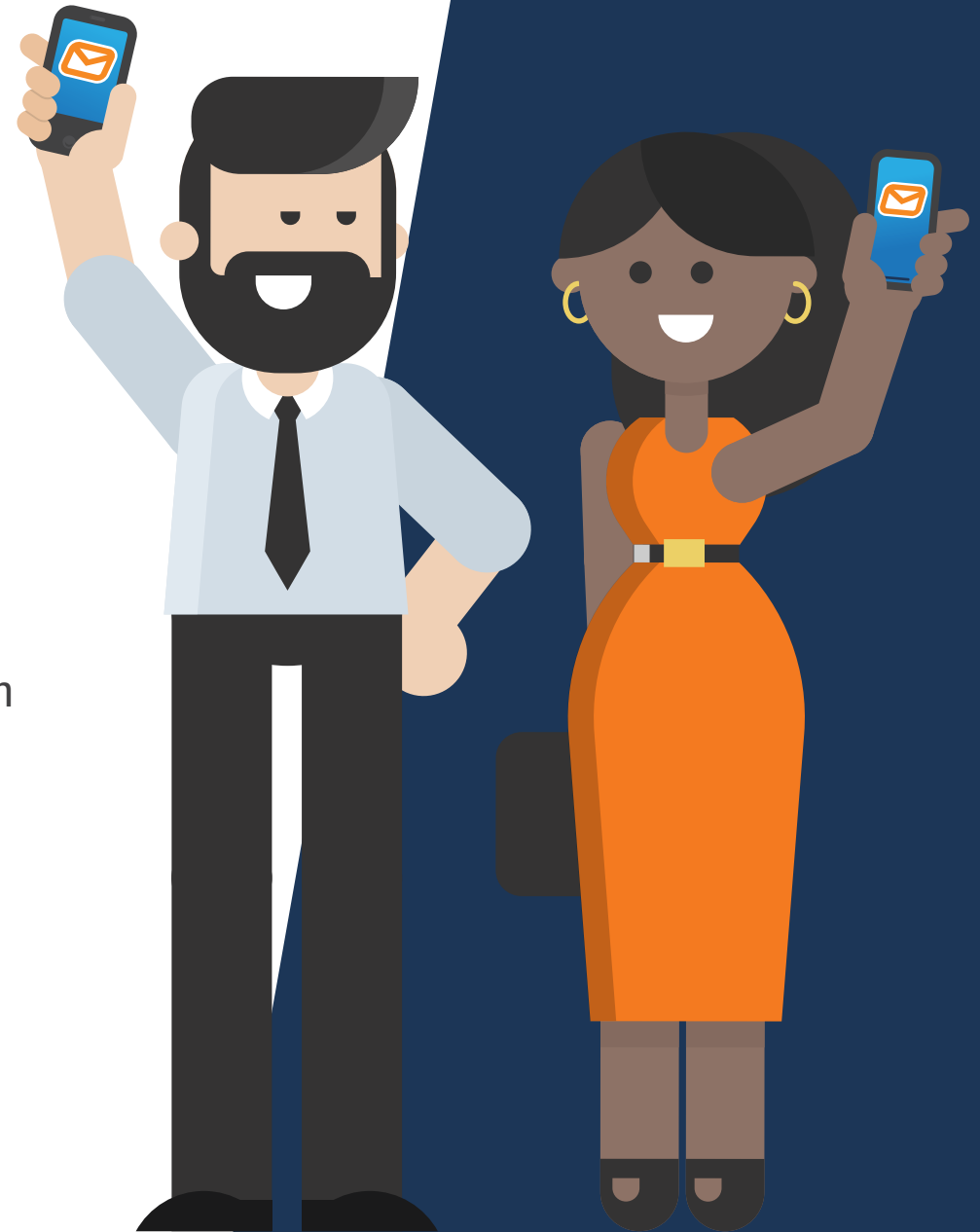
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Introduction

Over the last few years, we've seen more and more financial service providers turning to mobile technologies to communicate with customers and secure their processes.

Gone are the days where businesses ask, "Why should we use SMS in our business?" The question is now, "How can we use SMS for our business?"

In this e-book, we outline the ways SMS is improving communications and business processes for financial service providers.



1 Secure your system

One-time Pins (OTPs) have fast become one of the most popular tools to secure online transactions. Using our SMS API, you can send an automated OTP to a client's mobile phone when they are making a payment or logging into their account.



2 Prevent fraud

SMS is reliable and efficient, which is why it is commonly used for fraud prevention. Send real-time SMS notifications to customers when there is any unusual activity on their account that seems out of the ordinary.

TOP TIP: Automate this process with our **SMS API** for added protection.



3 Give financial advice

Send your clients weekly or monthly tips or advice on how best to save or invest their money.

Hi **Liz**, remember to swipe your card at any of our stores to get rewards on **your account!**



4 Let your customers contact you

Don't keep your customers listening to that 90's jingle while on hold. Rather use an incoming number so your customers can easily message you.

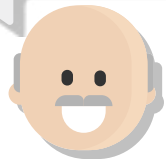
TOP TIP: Incoming numbers can also be used as the first step in a loan or credit card application or to update the client on the status of their application.



Send SMSes from your CRM

Wondering how to make the most out of your CRM? Why not SMS-enable it using our SMS API and have your staff contact clients directly from your system. This could include anything from important account information to automated birthday wishes.

Doug, your monthly statement is now available online. Log in to **your account** to check it out. Please contact our service desk if you have any questions. **Bank4You**



Make it personal

Make your customers feel special by sending personalised text messages about things that matter to them. Like investment opportunities, loan details, payment reminders, or a simple birthday message.

Nic, your loan application has been **approved!** Please contact us within **48 hours** to process your funds. **Easy Loans.**



SMS for in-house communications

SMS isn't just for your customers, it's for your staff too. Quickly send out important updates, announcements, and reminders so no-one misses out. For example:



Hi team, the internet connection will be down at 11:30am for 30min. Please plan accordingly.

We need 3 volunteers to attend the CPR training next week Tuesday at 10am, please reply "yes" if you'd like to attend.

Quick reminder about the staff meeting in the boardroom in 10 minutes. P.S. there will be cake. Don't be late!

Welcome, Meg! We are so excited to have you on the team! To get things started, your login details are: UserMeg & MegPass



When it comes to the financial services sector, time really is money - which is why SMS is the perfect solution. Now that you have seen what SMS can do, how are you going to use it in your business?

Sign up today!

To get started, [email us](mailto:info@bulksms.com)
or visit us at www.bulksms.com

