

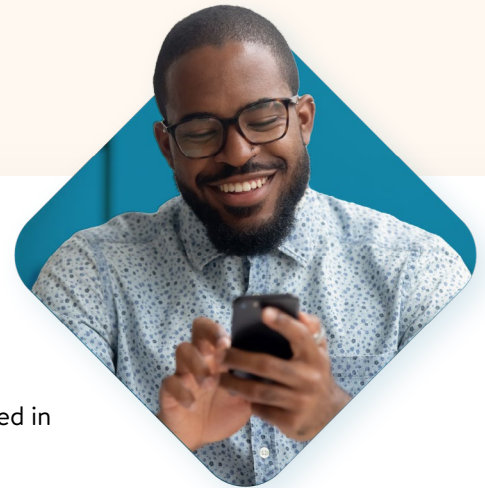
# Statflo for Financial Institutions

## What is Statflo?

Statflo is the leading compliant business texting platform. As the champions of customer communication, we orchestrate conversational business text messaging that **authentically engages the right customer** with personalized content.

With seamless integrations to existing systems, rich sendable content, and multi-channel messaging, customer-facing teams have all the tools and context they need in a single platform to **engage, retain, and grow** their customer base.

For more information, please visit [www.statflo.com](http://www.statflo.com)



## Why business texting?

- **Customers expect digital communication options**, especially business texting, for sales and customer support
- **Your staff may already be texting with your customers**, but on their personal devices, which is impossible to track and ensure brand standards are met, while also creating compliance risks and putting your company at risk for fines.
- **Customers want to engage with live people**, rather than robots, but still through a digital channel.
- **Your staff will be more effective and efficient with a business texting platform** compared to using email or calling alone.

## How businesses can benefit from business texting?

**Sales** - Make it easier for your sales team to foster loyal customer relationships and capture upsell opportunities with convenient two-way messaging.

**Business Development** - Acquire new customers or offer services/products to existing customers by sending personalized and relevant product information, following up with customers via text, and having account details in a single place.

**Marketing** - Boost client engagement by using text messaging to share relevant information, gather feedback, and share details on new service/product offerings.

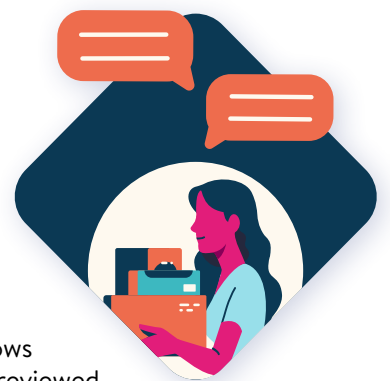
**Customer Support** - Increase customer satisfaction by offering the convenience of two-way text messaging to resolve issues remotely and efficiently.

**Training and Coaching** - Business texting run through a texting platform like Statflo allows companies to better manage their teams' performance. Conversations can be tracked, reviewed and assessed for improvement to better your front-line teams and business outcomes.

**Credit & Collections:** Improve customer experience by reducing collections stress by sending text reminders for collection due dates or overdue notifications to increase the success rate of debt collections.

**Lending:** Simplify loan applications by streamlining the process and allowing customers to upload and execute required documents through text messaging.

**Customer Onboarding:** Improve the customer onboarding experience with personalized touch points and easier interactions. Create more upselling opportunities with a more efficient and effective program through text.



## How does statflo help?

Stay competitive through your digital strategy: **96%** of businesses report that not digitizing customer engagement would negatively impact their business, including making them less competitive, causing a loss of revenue, and an inability to meet customer expectations. *(Twilio)*

Customers prefer two-way messaging with businesses like yours: More than **50%** of consumers rank at least 1 form of messaging (such as texting or messaging through social media) in their top 3 preferred methods of communication with a business. *(Google)*

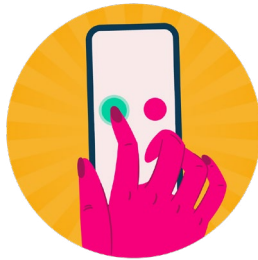
Provide customers with the high touch communication they want: Consumers are expecting organizations to transform their customer engagement by integrating high tech with “high touch.” Real time communication channels such as SMS/text play a critical role in maintaining customer relationships. *(Twilio)*

Ensure security, compliance, and scalability are in check: As more services are offered via mobile channels, security, compliance, and scalability become critical for safely moving businesses to a digital way of engaging with their clients. You need a tool that helps you meet all those requirements. *(Twilio)*

## Proven Results



Up to **30%**  
reply rates



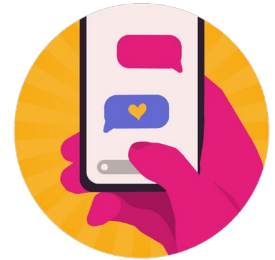
As low as  
**0.2%** opt-out



An average of **22%**  
higher retention



Increase conversion  
by **2.5% - 7%** by adding  
personalized texting



Up to **10%** conversion  
on replies (**6X higher**  
vs. other channels)

## Important Statflo Features

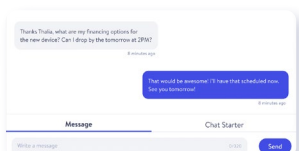
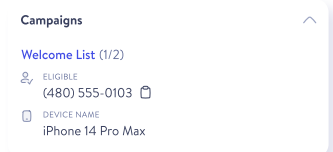
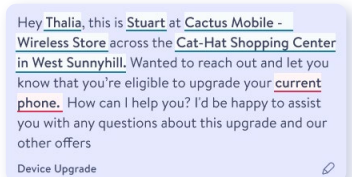
**Chat Starters** - Send hundreds of pre-drafted messages that contain both fixed text and editable fields to add that personal touch and start the conversation right but without retyping the same message to every contact. You can have one or more pre-written Chat Starters to make outreach easier, more efficient and more effective.

**Smart Lists** - Reach out to groups of contacts for the same topic with Smart Lists. Smart Lists are uploaded and synced from your database so you can effectively sort your contacts by topics when reaching out to them.

**Widgets** - Stay informed with embedded tools that reflect key customer information such as contact details, customer activity, opportunities, and more. This increases your customer engagement by allowing your staff to have full context all in one place.

**Sendables** - Streamline processes by having the ability to send curated content/documents within your conversations. Turn any conversations into more productive experiences for your customers.

**Calling and SMS Features** - Diversify your outreach by allowing users to make a call through Statflo and/or send text messages while tracking all the activity and logging interest levels.



## Compliance

Ensuring that you have the best compliance controls and security measures in place for customer outreach should be top of mind for your business.

### Why?

Failing to have compliance safeguards in place means you are leaving your customers, internal teams, and business entity unprotected. This could lead to serious penalties and losses for individual users and the business.



### Compliance Measures:

- We have industry leading compliance measures built into the platform, allowing you to adhere to **TCPA** (in the United States) and **CASL** (in Canada) regulations.
- Statflo meets the strictest standard for storage, privacy and security. We have obtained **SOC2 Type II** company certified through a tier 1 accounting firm and we meet the requirements of **TCPA**, **CPNI**, **CCPA**, **CAN-Spam**, **CASL** and **PIPEDA**.
- Compliance filters ensure that inappropriate language and phrases are flagged and blocked from being sent and received in real time.
- Statflo can integrate with your SSO solution to support existing security settings and permissions.
- Our contact preference management tool helps you handle opt-outs for all available communication channels, while also ensuring internal DNC lists are updated and scrubbed.

### Security Framework:

- Statflo has controls in place to maintain the confidentiality of the data you make available to our platform.
- Our risk-based assessment security framework includes administrative, technical, and physical safeguards designed to protect the confidentiality, integrity, and availability of data.
- Statflo secures your passwords and secrets using industry best practices to salt and hash credentials before they are stored. You can also add another layer of security to your account through SSO integrations and enabling two-factor authentication (2FA) in those integrations.
- We are committed to continuous monitoring and vulnerability management by developing processes and procedures for handling incidents, as well as

