

## News for Winter 2021

The need for a secure and compliant chat platform for businesses to engage with clients is stronger than ever. Two recent news events illustrate this very clearly.

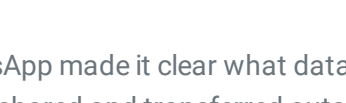
The first is WhatsApp's upcoming privacy policy changes. The second is the FCA's clear warning to advisers about the misconduct risks of sharing potentially sensitive information connected with work via social chat platforms. Deploy Qwil Messenger and remove these risks in your business.

We now have over 2,800 firms sending thousands of messages and files daily using Qwil Messenger. We continue to deliver new features and are building out-of-the-box integration solutions as part of broader enterprise platform ecosystems. This month we are finalising our status as an ISV partner of Salesforce and making our connector available to customers via their AppExchange.

[Get in touch](#) to find out more.

## WhatsApp privacy changes and the FCA's guidance on social chat tools

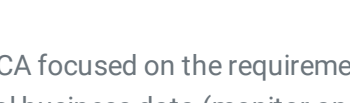
WhatsApp has revolutionised the way we communicate. It is the most preferred messenger app in the world today. So what does the recent news mean and why shouldn't it be used by professionals with their clients?



WhatsApp made it clear what data was being shared and transferred outside of Europe (and potentially with Facebook).

*"You provide us the phone numbers of WhatsApp users and your other contacts in your mobile phone address book on a regular basis. You confirm you are authorized to provide us such numbers to allow us to provide our Services."*

Do your staff have the consent of each contact, staff or client in their phone book for their details to be shared with WhatsApp?



The FCA focused on the requirement to control business data (monitor and record) in their recent [FCA conduct newsletter](#) with the increased risk of misconduct due to homeworking.

*"This includes increased use of unmonitored and/or encrypted communication applications (apps) such as WhatsApp for sharing potentially sensitive information..."*

Do you allow staff to use their personal email accounts to communicate with clients?

[Find out more](#) how social tool usage can put businesses at risk.

## Upcoming features

As per our last update, we continue to work on our in-app video, audio and screen sharing capabilities. In addition, we have now updated our [Product Plans](#) with the features we plan to release in the coming months. Some of the most popular include:



### Email (fall-back) notifications

Users can now be alerted at their registered email address when they have unread messages for an extended period of time.



### Message details

Mobile chat participants will be able to see who has read each message in a chat as they currently can on the desktop and web apps.



### Reply to a message

Chat participants will be able to select a message in a chat thread and send a reply to that message.



### Read only chats

Read only chat threads can be created to enable information broadcasting in a chat thread.



### Complete a chat

Staff web users will be able to access a "Complete" action preventing new messages being sent in a chat. This is useful to help manage communication threads and record keeping.



### Single factor invitations

Organisations will be able to choose to invite users to the platform using an email address only, with the second factor (SMS phone number) added by the user during the sign-up process.

## Automating Messages

Whilst enabling staff and clients to chat and share documents securely is of huge benefit, Qwil Messenger also supports automated messaging. A number of our clients have started to take advantage of our APIs to enable this in the following ways:



### Calendar reminders

Clients are automatically sent a chat from their adviser reminding them of upcoming meetings. Clients can easily respond to these chats, should they need further details or to re-arrange the meeting.



### Chat butler notifications

The butler can be used to publish content to users in bulk. Hundreds of these types of messages being sent daily. Traders and sales teams are informing clients of market movements in near-time. School administrators also love using this feature to provide ongoing updates to staff and parents.



### eDelivery of client reports

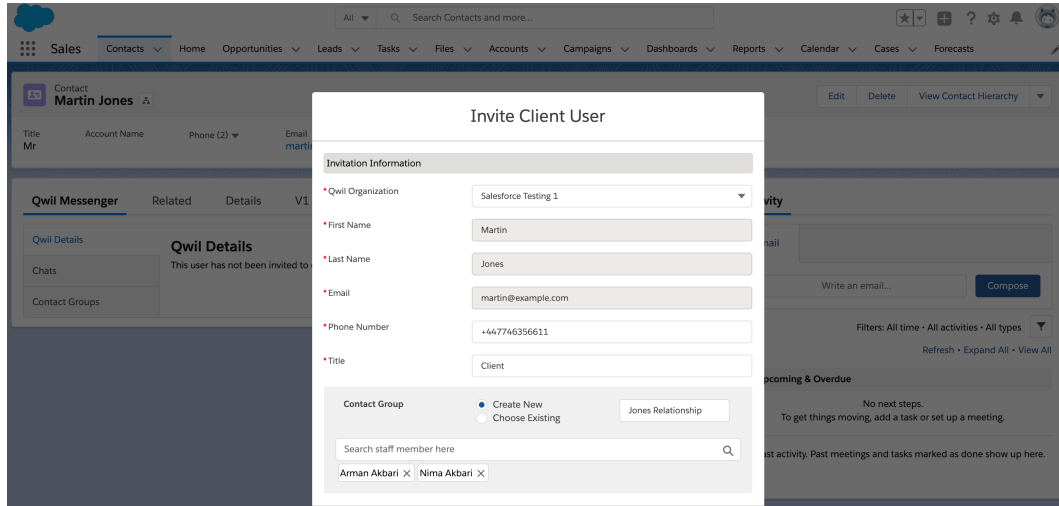
Several wealth managers are now automatically sending their client reports via Qwil instead of post or an online portal. One firm is planning to deploy a chatbot to enable clients to request and receive reports in real-time via Qwil.

## Coming soon to the Salesforce AppExchange



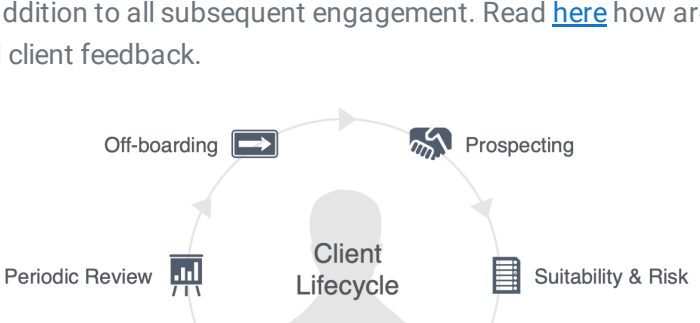
Our most exciting partnership to date is with Salesforce. We are in the final stages of releasing our Qwil Messenger Connector for Salesforce via the AppExchange.

Using core CRM data, clients can easily be invited to join Qwil from within Salesforce in a few simple clicks. Any chats that the client has with the firm are automatically available to review and access from within Salesforce. Users can also start chats with their clients natively in Salesforce.



## About Qwil - FAQ

**What do I use Qwil for?** Qwil Messenger supports engagement across the full client lifecycle, from the moment you qualify a prospect, to facilitate an external on-boarding experience in addition to all subsequent engagement. Read [here](#) how are customers are using Qwil and client feedback.



**Is Qwil just an extra channel?** Qwil Messenger not only replaces email for communication with clients but allows you to communicate rather than just correspond. Just like social chat platforms you can exchange messages, but can also share documents and images in a simple, safe and compliant app.

### What is different with Qwil?

Qwil has 2 user types, staff and clients who are all securely invited to a branded tenancy with contact lists and co-ordination rules defined by your firm. Everything is secure, recorded and without the need for further passwords as all users are verified. You can log the transcript and search for all conversations.

### Security?

Qwil is a banking-grade application. Security and privacy are ensured by being invitation only using 2 Factor Authentication (2FA) AND having all data encrypted in transit and at rest. We are ISO 27001 certified since October 2020 Read our [Security whitepaper](#).

### How easy is it to deploy?

Qwil is deployable in minutes. We know that no one has time to read long instruction manuals. Tools have to be intuitive for both staff and clients to use, with limited training required. [Reading our one pager or watching our 15 minute training video](#) is all it takes for you to know everything you need to know about using Qwil Messenger.

## Interested in finding out more?

Hi. How can we help?

Find anything (e.g. accept your invite, start a chat or invite a user)

We have built our technology to scale and be available for everyone, from large international organisations to independent practices. Find out more at [www.qwilmessenger.com](http://www.qwilmessenger.com). Leave your details on our [site](#) or [email us](#) to try Qwil.

Have a question on how to use Qwil? Head to our [Help Centre](#) to find practical advice and guides. You can easily search for answers and chat with our customer support representatives. It intended for your staff administrators as well as your end users (staff and client users).

All features included in this announcement are subject to change. You are receiving this communication because you are listed as a Qwil Messenger administrator or are a registered business contact for your organisation for our product. [Let us know](#) if you no longer want to receive these communications.

Safe and compliant client chat for your business has arrived. Find out more at [qwilmessenger.com](http://qwilmessenger.com)

