



CellTrust SL2™ Drives Mobile Productivity and Compliance at Payne Capital

“CellTrust SL2 has been a game changer for us in terms of productivity and compliance. We used to have to explain to our customers that we could not text with them, or if someone did, we had to make a screen grab and archive it. With the SL2 Enterprise Mobile app, text messages are seamlessly captured and archived.”

JENNIFER ANGELL, FINANCIAL ADVISOR AND DIRECTOR OF OPERATIONS,
PAYNE CAPITAL MANAGEMENT

Case Study

Industry

Financial Services

Headquarters

New York, NY USA

Customer Objectives

Payne Capital Management selected the CellTrust SL2 Enterprise Mobile app with its own built-in Mobile Business Number (MBN) feature to provide its advisors with privacy and their clients with a direct line, while capturing and archiving work-related conversations for regulatory compliance.

Specific Challenges

Prior to CellTrust SL2, the Payne Capital Management team had to explain to their clients that they couldn't text message with them due to regulatory compliance. It was either that or walk around managing two cell phones – their personal and one that belonged to the company. When an advisor did have to respond or send a text message, they would have to make a screen grab to archive every work-related text message they had sent on their personal mobile phone. They also preferred not to share their private mobile phone numbers.

Solution

- CellTrust SL2 domain provisioned in a multi-tenanted instance
- Multiple CellTrust Mobile Business Numbers (MBN)
- User Voice and Messaging
- Users APP to APP Calls and Group Chat Only
- Configured for real-time capture in Smarsh Professional Archive

Results

PCM financial advisors have continued using their personal cell phones - and now text with their clients - knowing that work related texts are being captured and archived in support of financial regulatory compliance. In 2020, when working from home became the norm for the PCM team, SL2 set boundaries between work and private life on one cell phone while seamlessly capturing and archiving work-related texts.

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Customer

Independent Financial Advisory
Based in New York, NY and
Philadelphia, PA in the USA

CellTrust

CellTrust is a global leader in enterprise mobile communications, compliance enforcement, traceability, eDiscovery and security, for highly regulated industries.

CellTrust's experienced team is ready to help you increase mobile client engagement and advisor productivity, while managing risk and enforcing regulatory compliance

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