

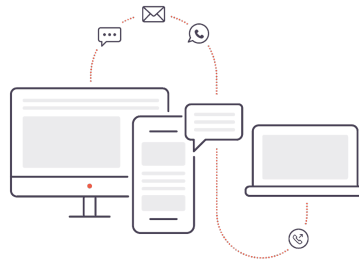
Introduction

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As with any software implementation, rolling out MultiLine is as much about change management as it is technology deployment. For that reason, we've focused on how to engage, educate, and win the support of end users and key business stakeholders.

Our goal is to help you achieve a successful MultiLine rollout with maximum user adoption and business value.

Enable reliable, compliant mobile communications from anywhere with MultiLine



MultiLine ensures reliable, compliant client communications for remote employees, including financial advisors, wealth managers, investment bankers, brokers, traders and other customer-facing roles.

The software-based service includes:

- Mobile and Desktop apps to call and message
- Management Portal
 - administrative tools for fast, over-the-air provisioning
 - centralized storage of data for regulatory reporting
- Optional compliance features, such as call and message recording, automating consent to message, automatically uploading recordings to your compliance archive, and more
- Optional API integrations that integrate MultiLine into your workflows
- Optional AI features such as service quality reporting, call sentiment analysis, and inbound social message routing.

MultiLine overcomes the limitations of stopgap approaches to communicating with clients to maintain compliance and business continuity whether employees work in the office, on the go, or at home.

We Promise:

A rapid rollout

- Deploy to 1,000s in days
- Users up and running in minutes
- Everything online and over-the-air

Rock solid reliability

- Works on any mobile device
- Works in any home environment
- Works around the world

Gap-free compliance

- Capture in- and outbound voice and text
- No user action to record
- Central storage and surveillance

This guide will help you through 4 key steps:**1. Quantify Mobile Usage**

Start with a clear understanding of the size and cost of maintaining your corporate mobile estate. In addition, collect monthly usage statistics for mobile data and calls. These figures are important inputs to your rollout strategy and business case.

2. Devise An Engagement Plan

Prepare a plan to build awareness and acceptance for MultiLine. Expect to engage a variety of stakeholders—business and IT executives, HR, Legal, Compliance, and end users—to ensure a smooth implementation.

3. Establish Success Metrics

Define how you will measure success given the objectives for your MultiLine deployment. Common metrics include number of activated users, number of corporate devices retired, and user satisfaction scores.

4. Roll Out In Phases

Onboard new users in phases to mitigate risk, build internal capabilities, and prove the value of MultiLine to the business. Early successes will generate the positive word of mouth that builds momentum for your rollout.

Let's get started!
