

PARTNER SALES DECK

FOREX INDUSTRY

Smarter Customer Engagement for Forex Firms

A partner-ready guide to selling Text solutions into the fast-moving world of foreign exchange — where speed, trust, and compliance define every client interaction.

CONTEXT

Industry Context: The Forex Landscape

The global forex market processes over **\$7.5 trillion in daily volume** — the largest financial market in the world. Retail participation is surging, but so is pressure. Brokerages must manage **24/7 operations** across time zones, languages, and regulatory jurisdictions while delivering instant, personalized support.

Regulators are tightening oversight on client communications, onboarding, and risk disclosures. **Firms that don't modernize their engagement stack risk losing clients to faster, more responsive competitors.**

24/7 Markets

Traders expect real-time support across every session — London, New York, Tokyo, Sydney

Regulatory Scrutiny

KYC, AML, MiFID II, and risk disclosure requirements are non-negotiable

Fierce Competition

Hundreds of brokers fight for the same retail and institutional traders

Introducing Text for Forex

What Is Text?

Text is a comprehensive customer engagement platform purpose-built for businesses that need to combine **live chat, AI automation, help desk, and knowledge base** into one unified system.

For financial services, Text provides the speed, security, and compliance features that forex firms demand — without the complexity of building custom infrastructure.

[Check: Best AI Tools for Financial Services](#)

Why It Matters for Forex

- **Omnichannel engagement** — chat, email, messaging, and social in a single agent workspace
- **AI-powered automation** — chatbots that handle routine inquiries instantly, 24/7
- **Built-in compliance support** — conversation archiving, transcripts, and data security standards aligned with financial industry needs
- **Scalable by design** — add markets, languages, and channels without adding proportional headcount
- **Integrations-ready** — connect seamlessly with CRM, trading platforms, and KYC tools

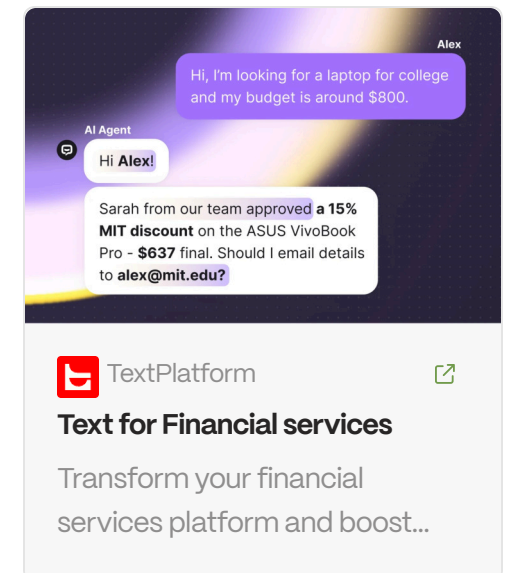
PAIN POINTS

How Text Solves Forex Pain Points

Every feature maps to a real business problem. Here's how Text capabilities translate directly into measurable outcomes for forex firms.

Pain Point	Text Capability	Business Impact
Slow response during volatility	LiveChat with real-time routing, sneak-peek typing preview, and canned responses	Faster resolution → fewer missed trades, higher trader retention
24/7 multilingual coverage	ChatBot with multilingual AI, automatic language detection, and after-hours automation	Round-the-clock support without round-the-clock staffing costs
Compliance & audit gaps	Full conversation archives, transcript exports, and secure data handling	Audit-ready records, reduced regulatory risk
Onboarding bottlenecks	Automated workflows for document collection, verification steps, and guided walkthroughs	Shorter time-to-trade, lower drop-off during registration
Trader churn from poor CX	Unified agent workspace, customer context at a glance, proactive chat invitations	Higher satisfaction scores, lower cost-per-interaction

Streamlining financial services with Text App:



Industry-Specific Use Cases

These scenarios show how Text works in the daily reality of a forex brokerage — not in theory, but in the moments that matter most to clients.

1 Live Trade Support During Market Events

When non-farm payrolls drop or central banks announce rate decisions, chat volume can spike 5x. LiveChat's intelligent routing and queue management ensure high-value traders get priority access to experienced agents — in real time.

[Route Chats to Selected Teams](#)

3 Deposit & Withdrawal Status Self-Service

AI-powered chatbots answer the most frequent question in forex support — "Where is my money?" — instantly, by integrating with payment systems and providing real-time transaction status updates.

[Automation Workflows](#)

2 Automated KYC & Account Onboarding

ChatBot guides new clients through identity verification, document uploads, and risk disclosure acknowledgments — collecting everything needed before a human ever needs to intervene. Agents handle exceptions, not routine steps.

[Automations Overview](#)

4 Proactive Client Re-Engagement

Targeted chat invitations reach dormant traders browsing the platform, offering personalized incentives or educational content. This turns passive visitors back into active, funded accounts.

[Contacts and Real-time Customers](#)

Real Results in Financial Services

These case studies demonstrate the measurable impact of Text.com products for financial services companies — proof points your prospects will care about.



SOCIAL PROOF

Easy Companies



LiveChat®



Mr Lender Hits 14,000 Five-star Revi...

See how Mr Lender gets 10% more engagement and increases conversions...

An Australian financial services firm used LiveChat to boost customer satisfaction and cut response times — **converting more visitors into paying clients** while handling high volumes efficiently.

"LiveChat allowed us to be more accessible to our clients and answer their questions right away."

Mr Lender



LiveChat®



EasyCompanies Simplifies the Way C...

See how they used LiveChat to cut down the number of calls they get and started to...

A UK-based short-term lender used LiveChat to **cut loan inquiry response times, boost agent productivity, and improve applicant experience** — proving chat works even in heavily regulated financial workflows.

"Customers get the help they need without waiting, and our team is more productive than ever."

Measurable Impact Partners Can Promise

When positioning Text to forex prospects, lead with the business outcomes that matter most to operations leaders and C-suite decision-makers.

3x

Faster Response

LiveChat delivers answers in seconds versus minutes for email or phone queues

30%

Query Deflection

AI chatbots handle routine questions automatically, freeing agents for complex cases

24/7

Always-On Support

Automated coverage across every trading session without additional staff shifts

100%

Audit Trail

Complete conversation archives for regulatory compliance and dispute resolution

Check what services you can deliver with Text:

Text isn't just software—it's a platform that enables high-value consulting and implementation services. Position yourself as the strategic partner who transforms forex firms.

Text + Software Houses

Text + Web Design Agencies

Text + CX advisors

Text + IT Integrators

PARTNER VALUE

Why Buy Through a Partner?

Forex firms get the most value from Text.com when a knowledgeable partner handles strategy, implementation, and optimization. Here's the case you make to every prospect.

01

Industry Expertise

Partners understand forex workflows, compliance requirements, and trader expectations — translating platform features into business outcomes.

02

Faster Time-to-Value

Pre-built templates, integration playbooks, and proven configurations mean the platform is live and generating ROI in weeks, not months.

03

Ongoing Optimization

Partners continuously tune chatbot flows, refine routing rules, and adapt to new regulations — ensuring the platform improves over time.

Text Solution Program

The Text Solution Program is designed for **agencies, consultancies, software houses, VARs, and BPOs** who want to build a recurring revenue stream around a proven customer engagement platform.

01

Apply & Onboard

Join the program and access partner training, sales resources, and certification paths

02

Sell & Implement

Use partner tools to pitch, close, and deploy Text for forex clients

03

Grow & Earn

Earn commissions on licenses, expand with managed services, and deepen client relationships

Partner Benefits at a Glance



Revenue Share

Competitive commissions on every deal



Sales Enablement

Ready-made decks, battle cards, and demo environments



Dedicated Support

Partner manager and priority technical assistance



Certification

Training programs that build credibility with prospects

Ready to win Forex?



Text gives you the platform. Your expertise gives clients the transformation. Together, you deliver faster support, stronger compliance, and measurable growth for every forex firm you serve.

Explore the Resources

Log in to your [Partner App](#) to access training materials, track deals and set up new accounts for your clients.

Start a Conversation

Reach out to our partner team to discuss your forex pipeline and co-selling opportunities.

The Partner Advantage

Forex brokerages that work with Solution partners see **2-3x faster time-to-value and significantly higher long-term platform adoption**. You bridge the gap between powerful technology and real trading-floor results.

Together, we help forex firms support more traders, stay compliant, and grow faster.

[Check Partner Opportunities](#)

[Explore Financial Solutions](#)