How Revenue.io Helps Enforce Compliance Behavior and Data Integrity at Scale

Revenue

We help customers reduce risk and liability by making it easier for reps and IT managers to comply with internal and government regulations.

HIPAA	TCPA	GDPR	CCPA	CPRA	SOC 2 TYPE II CERTIFIED

HIPAA CERTIFIED

Revenue.io meets core security requirements for the HIPAA security rule. Revenue.io is a Business Associate under HIPAA due to encryption and general security standards set forth in our organization. As such, Revenue.io meets its obligations as a Business Associate to help its clients maintain compliance.

TCPA COMPLIANCE

Concerned that your outbound dialing isn't federally compliant? The Telephone Consumer Protection Act (TCPA) was passed into law in 1991 to limit telemarketing and automated telephone devices. Revenue.io helps companies adhere to various key requirements.

CCPA COMPLIANCE

Do you receive requests to delete customer or buyer data? Revenue.io admin controls empower administrators to easily manage and delete customer data, and our support and success teams are ready to help with any requests or questions.

GDPR COMPLIANCE

Revenue.io has implemented a number of security controls to help our customers comply with General Data Protection Regulation (GDPR) regulations. These security controls include administrative safeguards, access controls, data backup and disaster recovery, data retention policies, data breaches and employee training.

ROLE-BASED ACCESS

Have sensitive data in your CRM and want to streamline access or workflows by role? With Revenue.io, customers can customize access to certain features following role-based permissions by user, team and company levels.

SECURE SSO AUTHENTICATION

Want to ensure your team can use a single secure sign-on for data security and convenience? Reps log in to Revenue.io using their Salesforce credentials, meaning one less password to remember, protected SSO authentication, and a single management location.

REAL-TIME COMPLIANCE NOTIFICATIONS DURING CONVERSATIONS

Are your reps required to deliver specific compliance-related messages during conversations? Are there certain words or phrases that are forbidden? Revenue.io can be easily configured to remind reps of compliance requirements in critical moments during live conversations to help ensure they are never missed.

AUTOMATICALLY MEASURE AND TRACK REP COMPLIANCE PERFORMANCE

Revenue.io surfaces which reps may need automated reminders during live conversations, which may need to better adhere to compliance without reminders, and who may not be in compliance despite automated reminders. This helps you know which reps may need compliance coaching.

AUTOMATED CALL RECORDING COMPLIANCE

Worried that reps are recording conversations they aren't supposed to? Revenue.io helps make it easier for managers to implement region-specific call recording settings. This includes central administration tools that help ensure that the calls you want and do not want to be recorded comply with your legal counsel's guidance.

AUTOMATICALLY CHOOSE WHICH SPEAKERS TO RECORD

Want to record your rep or agent's side of the conversation, but not buyers or customers? Agent-only recording options help managers adhere to your legal counsel's guidance on recording while delivering as much information as possible to coach their teams.

● The integrity of your data is our top priority

Revenue.io offers a rigorous and comprehensive suite of features, certifications, and tests in place to help ensure our services and your data remain secure.

CLOUD AND NETWORK SECURITY

- Revenue.io leverages Amazon Web Services (AWS) to provide the infrastructure for our platform, allowing us to leverage advanced security and data protection.

- AWS has extensive certifications, including SOC 2 Type II and HIPAA, and meets various ISO requirements (https://aws.amazon.com/compliance/programs/).

- All Revenue.io systems run inside their own Virtual Private Cloud (VPC) with strict access controls, environment separation, and extensive auditing.

DATA AND APPLICATION SECURITY

- All data stored in Revenue.io is encrypted at rest, leveraging the AWS KMS service using signing keys managed by Revenue.io.

- Connectivity to internal databases is restricted to a subset of hosts on our VPC and enforces TLS encryption of data in transit over our network.

- For our advanced features such as call recording and real-time transcription, we also offer a "bring-your-own" solution for data storage, ensuring that a customer's sensitive data is wholly owned by the customer.

APPLICATION MONITORING

- Revenue.io uses multiple providers to monitor the performance of our systems, system errors, and anomaly detection.

- Revenue.io application logs are replicated to services separate from our primary infrastructure to independently audit and analyze our systems.

- We also maintain a public trust site at https://status.revenue.io, showing system availability, scheduled maintenance, incident history, security events, etc.

USER AUTHENTICATION & AUTHORIZATION

- Revenue.io does not utilize or provide any customer passwords on its systems.

- Access to the Revenue.io platform is enabled by integrating with a customer's Salesforce instance via OAuth.

- As part of this authentication and authorization process, customer-defined access controls to objects in Salesforce are automatically enforced on the Revenue.io platform.

→ The Real-Time RevOps Platform for Your Entire Team

Revenue.io powers high-performing teams with real-time guidance and revenue intelligence. By surfacing and recommending what works best, Revenue.io enables hundreds of customers like HPE, Fidelity Investments, and Amazon Business to deliver predictable results and optimize their entire revenue operation.