

hearsay

Hearsay Sites User Guide



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Hearsay Sites is the easiest and fastest way to create beautiful and high converting agent and advisor websites for the financial services industry.

Hearsay Sites allows corporations to quickly and efficiently roll out, maintain, control, and continuously optimize local agent and advisor websites across their field. With the built-in analytical and optimization capabilities, Hearsay Sites fits flawlessly into any financial services enterprise marketing strategy, proving return on investment every day. Agents and advisors can fine-tune websites to match their own business, creating local and relevant content, thus delighting their prospects.

This guide provides an overview of the Hearsay Sites features and tools that help you along the way. The guide provides a better understanding of how using web sites can impact your return on investment.

Product Overview

Hearsay Sites is built atop the Hearsay business platform, the pre-eminent omnichannel digital engagement center for the financial services advisor. It tethers the most effective marketing, acquisition, and servicing channels in one ecosystem, enabling agents and advisors to focus on the most important part of their job—building and servicing relationships—without the friction of switching between systems or the fear of compliance concerns.

HEARSAY SITES FEATURES

With Hearsay Sites, you can:

- Manage your profile and website, create a professional and cohesive online image
- Share quality content, showcase your thought leadership by creating and managing posts
- Create events, host virtual or in-person meetings for your clientele
- Follow up on your leads gathered through your website

GET SUPPORT

NORTH AMERICA
888.399.2280

UNITED KINGDOM
+44.800.808.5124

EMAIL
support@hearsaysystems.com

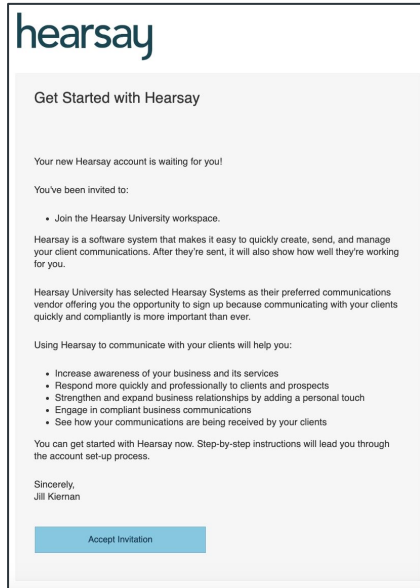
HELP CENTER
<https://success.hearsaysocial.com/hc/en-us>

Branded websites built for your field

Getting Started

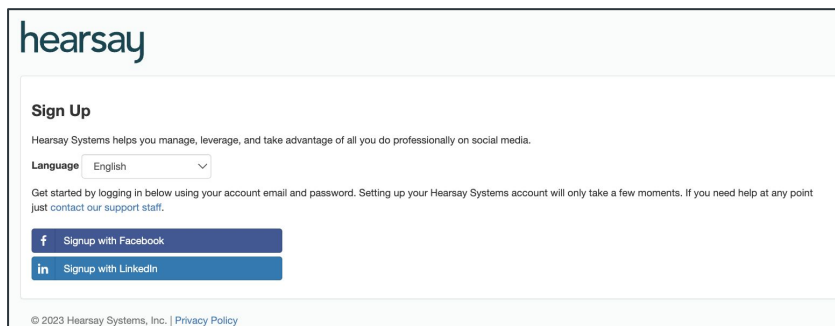
The first thing you'll need to do is accept your invitation from Hearsay Systems to activate your Hearsay Sites workspace.

1. Check your email for the invitation to Hearsay Sites. Then select **Accept Invitation**.



Alternatively, click on the signup link in the email you received.

2. Follow your organization's login method which could be via Facebook, LinkedIn, or your company login through single-sign on.

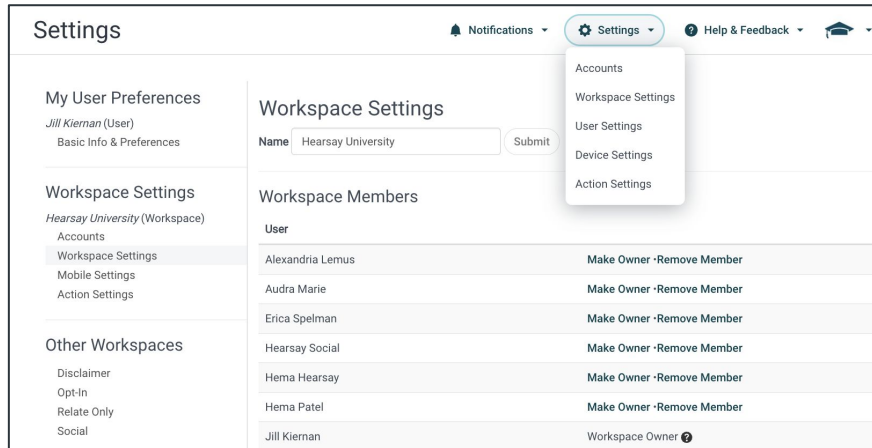


Note: Remember to always log in using the same method and platform you used to sign up for **Hearsay Sites**. If you are unsure of which login method to use, contact your sites program administrator.

Settings

Workspace Settings

A Workspace is an instance of Hearsay. You can invite multiple users to a Workspace such as assistants or team members to help you manage your Hearsay Sites account. To update your Workspace, click on **Workspace Settings** from the Settings dropdown located at the top of your screen.



1. To change the Workspace name associated with your Hearsay Sites account, select the Name text box, type your new name, and click **Submit**.
2. To change the Workspace Owner, click on **Make Owner** to the right of the user. You can only designate one Workspace owner.
3. If you are the Workspace owner, you can click on **Remove Member** to remove a user from your Workspace. If you have sent an invitation to join your Workspace, you will see those members under Pending Workspace Members. To cancel or expire the invitation, click on the “x” next to the date the invitation was sent.
4. To invite staff members to your Workspace, enter the staff member’s email address and click **Invite**.

(screenshot on next page)

Workspace Settings (continued)

Settings Notifications Settings Help & Feedback

My User Preferences
Jill Kiernan (User)
 Basic Info & Preferences

Workspace Settings
Hearsay University (Workspace)
 Accounts
Workspace Settings 1
 Mobile Settings
 Action Settings

Other Workspaces
 Disclaimer
 Opt-In
 Relate Only
 Social

Workspace Settings

Name

Workspace Members

User

Alexandria Lemus	Workspace Owner ?
Audra Marie	Make Owner
Erica Spelman	Make Owner
Hearsay Social	Make Owner
Hema Hearsay	2 Make Owner
Hema Patel	Make Owner
Jill Kiernan	Make Owner
Josh Wein	Make Owner
Lexie Hearsay	Make Owner
Mike Skalandunas	Make Owner
Pradeep Ananthapadmanabhan	Make Owner
Sophie Gonzal	Make Owner

Pending Workspace Members

	Invited by	Date Sent
3 <input type="text" value="jillian.m.kiernan@gmail.com"/>	Jill Kiernan	5/5/23 ✕

4 Invite More Workspace Members

Email

Language ▼

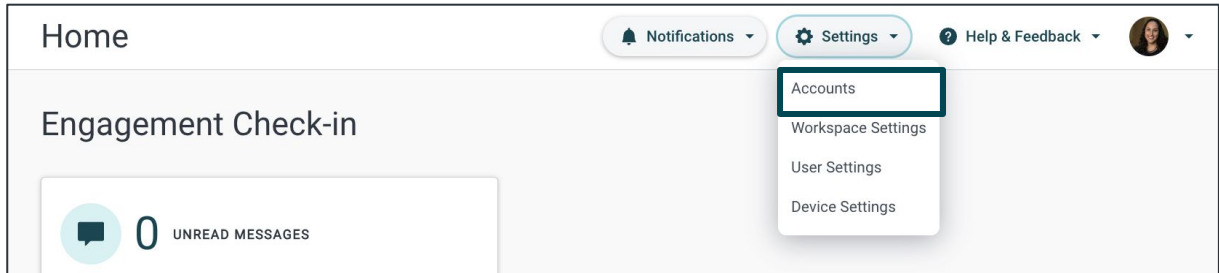
Message

Note: By default, you are the owner of your Workspace.

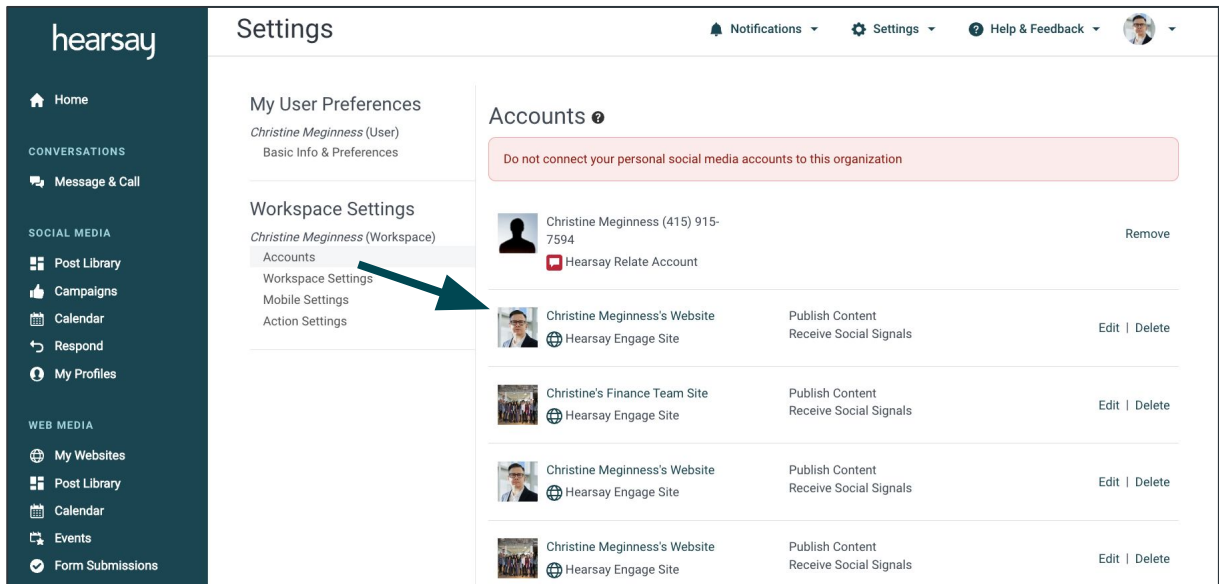
Accounts

To view your connected accounts and create your website in Hearsay:

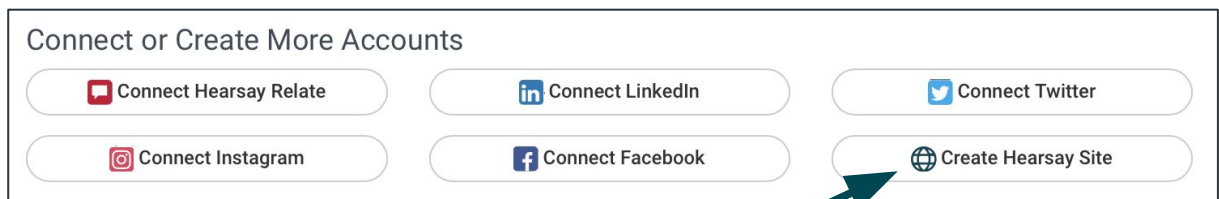
1. From the **Settings** dropdown located at the top of your screen, select **Accounts**.



2. Any connected accounts and websites will be listed on this page along with the account type.

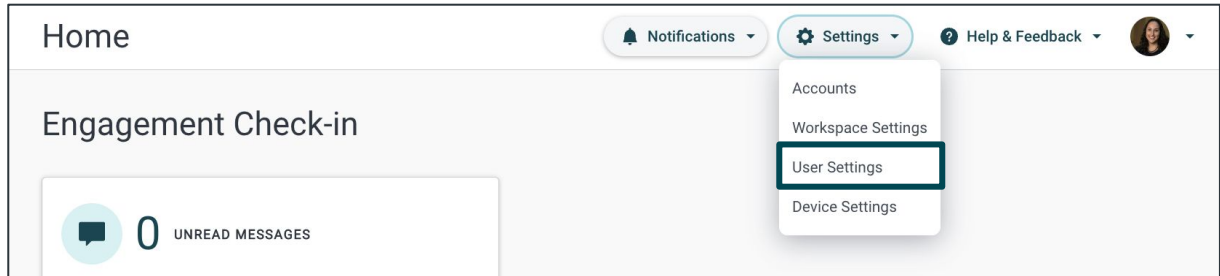


3. To create a new Site, select the **Create Hearsay Site** button at the bottom of the page to go through the process of creating a new Hearsay website. This is one way to access the site builder. The other account types may or may not be available, depending on your organization's settings.

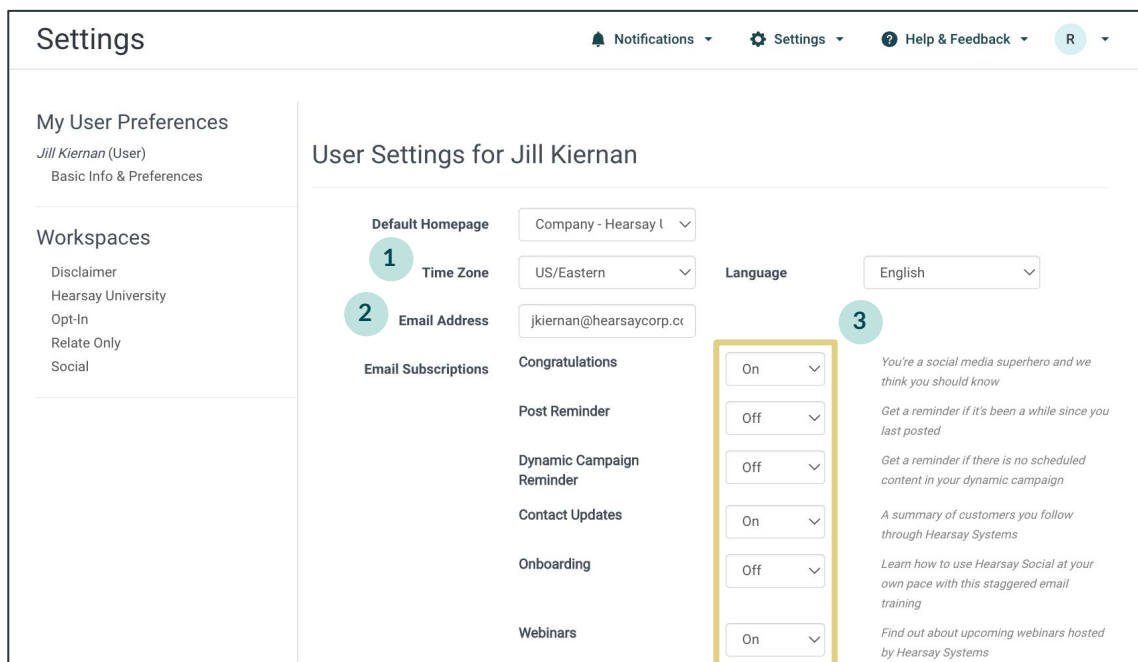


User Settings

You can adjust your Hearsay Sites account to make the application work best for you by changing your User Settings. To update user settings, select **User Settings** from the Settings dropdown located at the top of your screen.



1. Adjust your local time zone. This is important to make sure your scheduled posts go out at the right time.
2. Change or update your email address in the Email Address text box. Hearsay Sites notifications will be sent to this email address.
Note: If you sign on to Hearsay using the LinkedIn or Facebook login method, your email in Hearsay will update automatically to the email you use to login to your social network. We recommend updating your email in Hearsay to your corporate email address so you can receive Hearsay notifications to that email.
3. You can opt-in or opt-out of email notifications by selecting “ON” or “OFF” from the Email Subscriptions dropdown.



Suggested Content Email

The Suggested Content email that users receive has a section dedicated to content from the Content Library that is personalized for each specific workspace.

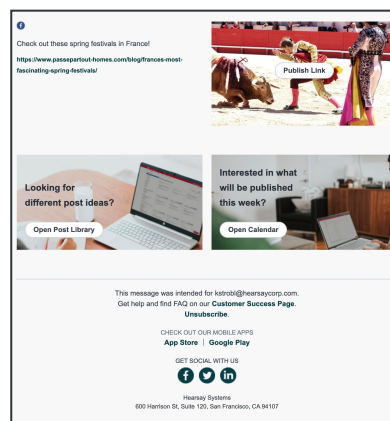
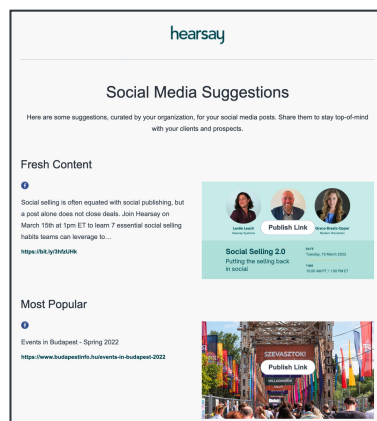
To enable this feature, in the **User Settings** section, select **Optimize** from the **Suggested Content** dropdown.

Email Subscriptions	Congratulations	On	You're a social media superhero and we think you should know
	Post Reminder	On	Get a reminder if it's been a while since you last posted
	Dynamic Campaign Reminder	On	Get a reminder if there is no scheduled content in your dynamic campaign
	Contact Updates	On	A summary of customers you follow through Hearsay Systems
	Onboarding	On	Learn how to use Hearsay Social at your own pace with this staggered email training
	Webinars	On	Find out about upcoming webinars hosted by Hearsay Systems
	Daily Administrator E-Mails	Off	Get daily updates on how many new alerts are found and how many new items have been submitted for approval
	Suggested Content	Optimize	Know when there's new content in your library
	Post Notification Denials	On	Sent when posts are denied.

Remember to click on the **Update** button at the bottom left of the page to save changes.

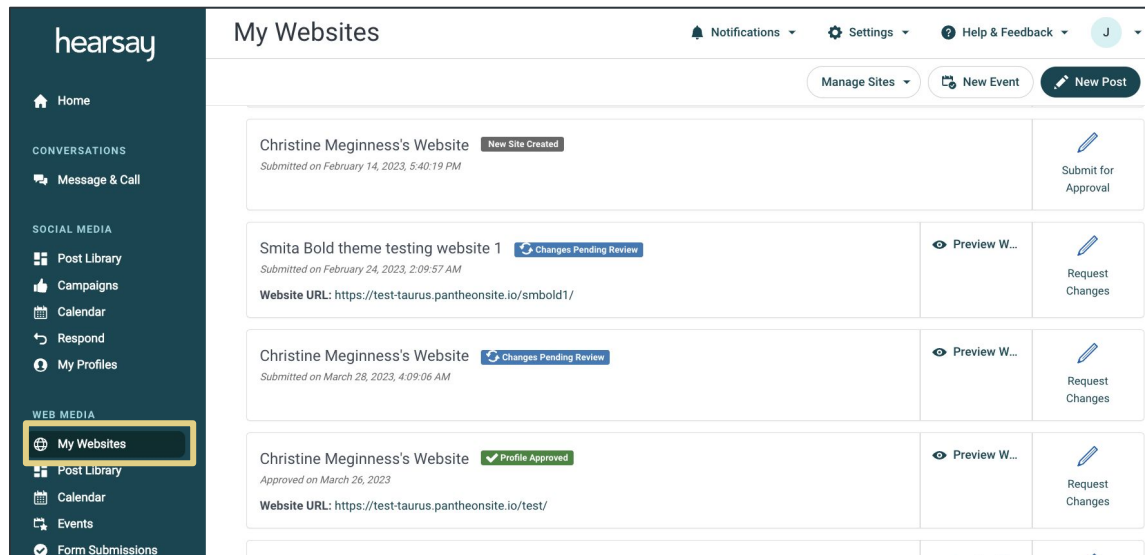
Post Notification - Scheduled Publish (Video)	On	Receive an email notification on the status of a scheduled video post or a campaign video post published to your accounts.
<div style="border: 1px solid black; border-radius: 10px; padding: 5px 15px; display: inline-block; margin-top: 10px;">Update</div>		

Individual pieces of content have visual indicators that show they can be published to Hearsay Sites. Users are able to unsubscribe from this email via a link included in the email.



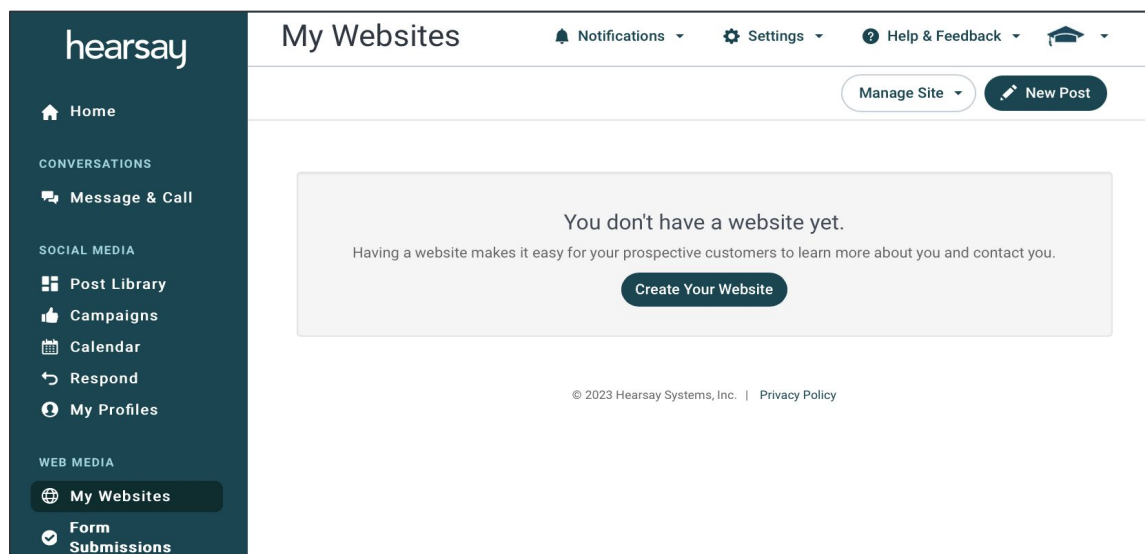
My Websites

The **My Websites** page displays the Hearsay websites you have created. This is where you can preview your Hearsay website, find your website URL, request changes to existing site, and submit any pending websites for approval.



If you don't yet have a website, you will be prompted to create one.

1. To create a website click on the button **Create Your Website**.
2. Follow the prompts to select a theme and enter the required information. Click **Next** to advance to the next step.



3. Fill in the info under **Required Info**. You will enter the information on the right side under “Requested Changes”. Click the **Next** button to continue.

The screenshot shows the 'Required Info' step in the 'My Websites' setup process. It compares the current profile information with the requested changes. The current profile information is mostly blank, while the requested changes section has empty input fields for the same information, indicating that the user needs to provide this information.

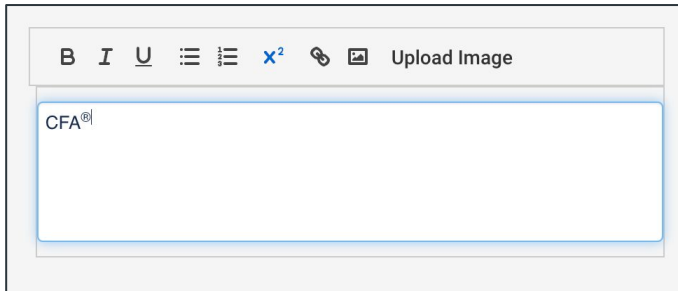
4. On the **Additional Info** screen, you can enter optional information you want to appear on your site. To add more fields to your site, click the **+Add More Fields** button to the middle right of the screen.

The screenshot shows the 'Additional Info' step in the 'My Websites' setup process. It compares the current profile information with the requested changes. The current profile information is mostly blank, while the requested changes section has empty input fields for the same information, indicating that the user needs to provide this information. A '+ Add More Fields' button is visible at the bottom left.

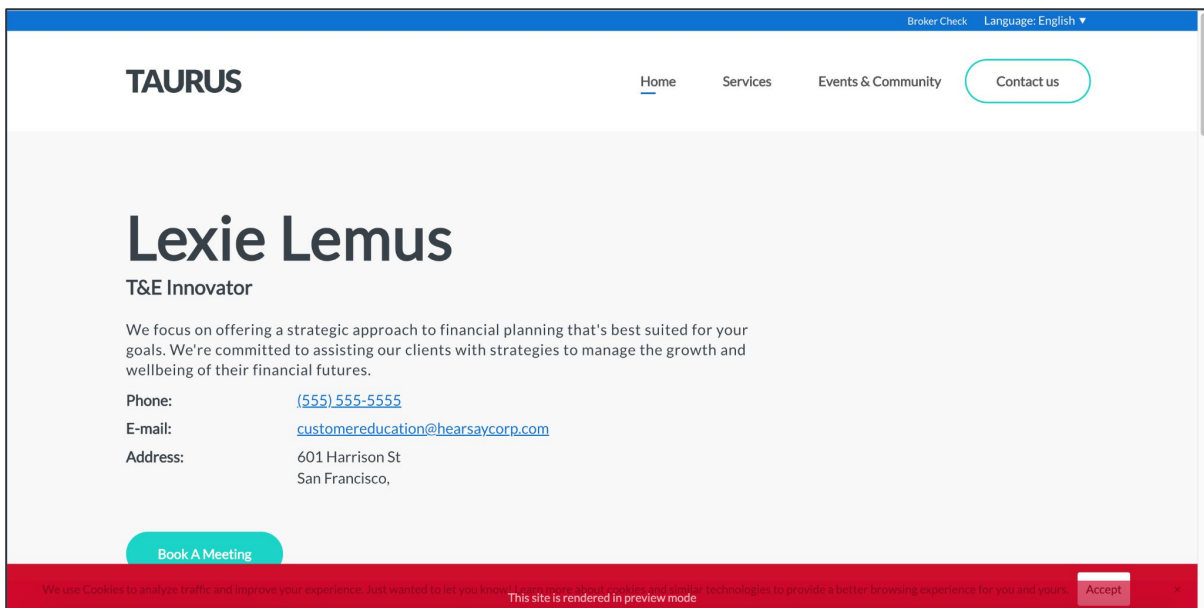
The list of optional fields that can be added to a website profile is as follows:

- Profile Photo
- Header Logo Image
- Header Logo URL
- Header Logo Alt tag
- Footer logo Image
- Footer Logo URL
- Footer Logo Alt Attribute
- Professional Designations
- Title (ex: Wealth Manager)
- Social Networks
- Profile Background Image

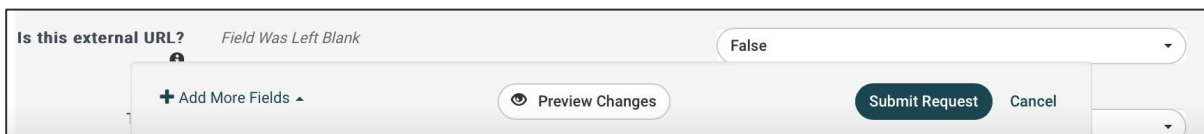
- When editing fields, use the rich text editor to format and upload content. Superscript characters such as “®” in CFA® or CFP®, can be applied to display licensing and designation copy on sites.



- Click the Preview Changes button to preview your website in a new browser window.



- When you're done entering and reviewing your information, click the teal **Submit Request** button on the bottom of the screen.



REQUEST CHANGES TO A SITE

To edit a site, click on **Request Changes** next to the site you want to edit.



Hearsay University's Website ✔ Profile Approved

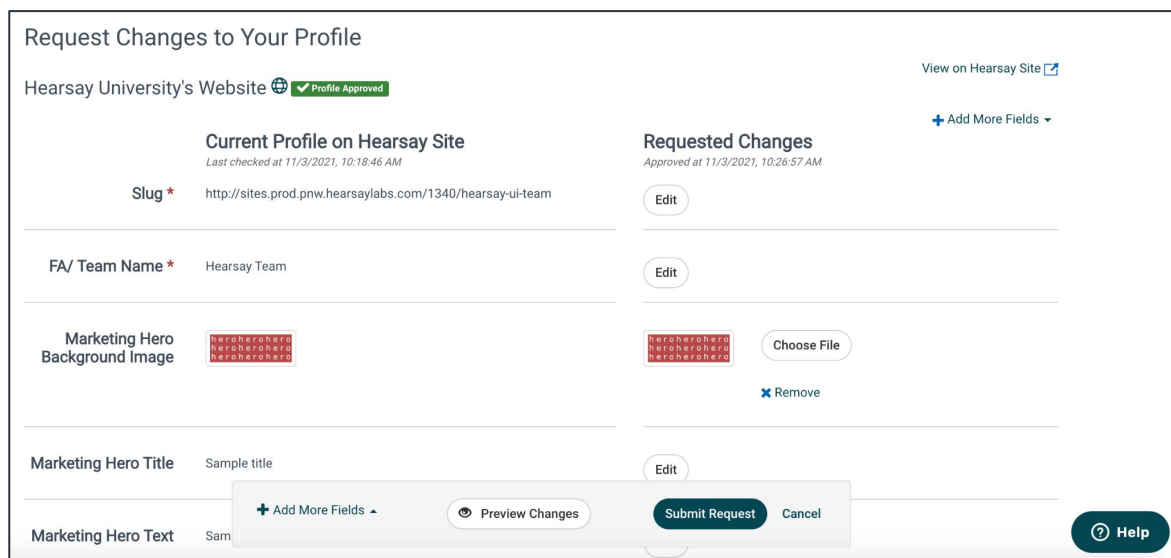
Approved on November 3, 2021

Website URL: <http://sites.prod.pnw.hearsaylabs.com/1340/hearsay-ui-team/>

Preview We...

Request Changes

- Clicking **Request Changes** will open a new screen that shows the existing information on your site on the left side under **Current Profile on Hearsay Site**. You will enter your new information under **Requested Changes** on the right side.



Request Changes to Your Profile

Hearsay University's Website ✔ Profile Approved

View on Hearsay Site



+ Add More Fields

Current Profile on Hearsay Site
Last checked at 11/3/2021, 10:18:46 AM

Requested Changes
Approved at 11/3/2021, 10:26:57 AM

Slug * <http://sites.prod.pnw.hearsaylabs.com/1340/hearsay-ui-team> Edit

FA/ Team Name * Hearsay Team Edit

Marketing Hero Background Image   Choose File
Remove

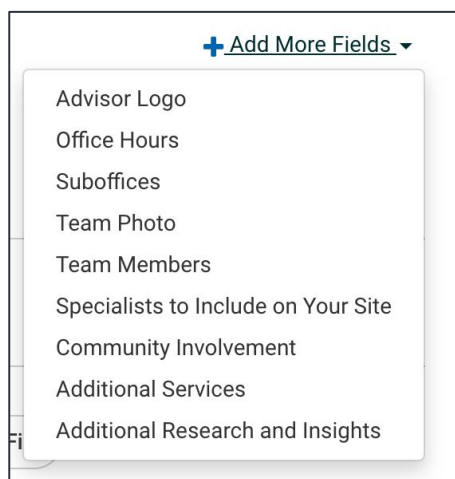
Marketing Hero Title Sample title Edit

Marketing Hero Text Sam

+ Add More Fields Preview Changes Submit Request Cancel

Help

- To add more fields to your site, click **+Add More Fields**.



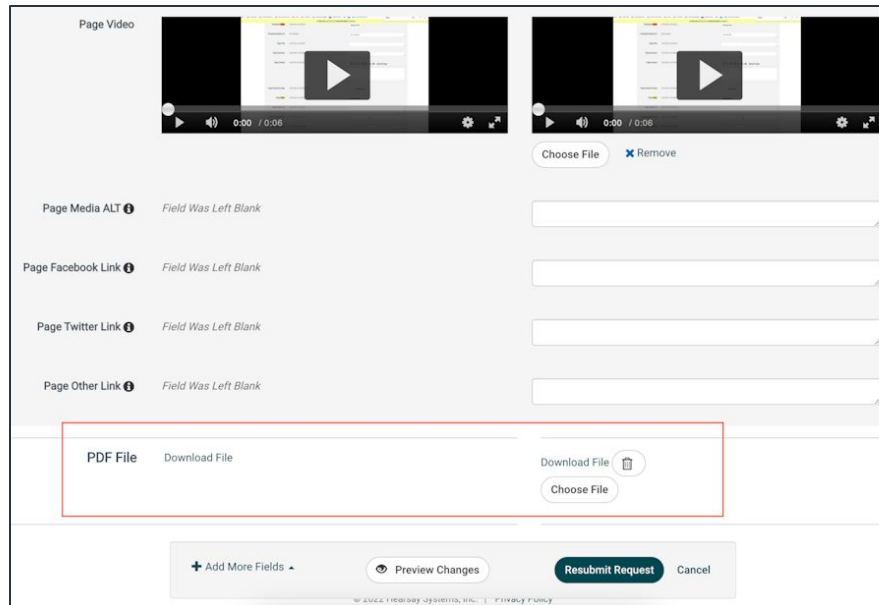
+ Add More Fields

- Advisor Logo
- Office Hours
- Suboffices
- Team Photo
- Team Members
- Specialists to Include on Your Site
- Community Involvement
- Additional Services
- Additional Research and Insights

- Once you've added in all your changes, click on **Preview Changes** at the bottom of the screen to review.
- After reviewing, you can click on **Submit Request** to send your requested changes to your admin team for review.

MAKING UPDATES TO YOUR SITE

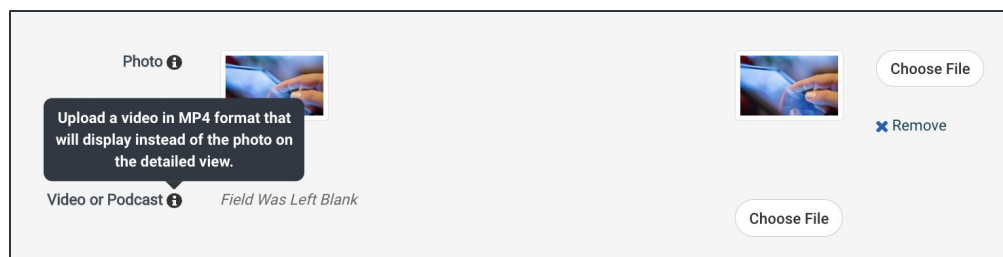
- **Adding PDFs:** Add PDF files to your site when requesting changes and send the file to compliance for review. After it's published, customers can open the PDF from the site.



**For compliance purposes, the PDF file is treated the same as an image uploaded to your site.*

***This feature is only available on the newest version of Sites and is off by default.*

- **Adding Podcasts:** Upload and play MP3 audio and send the audio file to compliance to play and review. When it's published, customers can stream the podcast on the site.



**For compliance purposes, the audio file is treated the same as a video file uploaded to your site.*

***This feature is only available on the newest version of Sites and is off by default.*

Post Library

The **Post Library** is where you can find and share pre-approved suggested content from your marketing team that is available to publish to your site. You can also subscribe to content campaigns and, if allowed by your org, you can create custom content. Click on **Post Library** under Web Media to access it.

- Sort Suggested Posts by:
 - **Recent:** The newest content added to your library
 - **Engaging:** Content that is receiving the most likes, comments, and shares on social media
 - **Popular:** Content that the majority of users within your organization are publishing
- Type a keyword or topic in the Search box to find related content.

The screenshot displays the Hearsay Post Library interface. On the left is a dark sidebar with navigation options: Home, Conversations (Message & Call), Social Media (Post Library, Campaigns, Calendar, Respond, My Profiles), Web Media (My Websites, Post Library, Calendar, Events, Form Submissions, Insights), and Contacts. The 'Post Library' option under Social Media is highlighted with a yellow box. The main content area is titled 'Post Library' and includes a search bar, filters (set to 'Hearsay Site'), and a pagination indicator showing 1,803 posts. Below the search bar, there are four post cards. Each card features a social media share icon, a thumbnail image, a title, a source URL, a brief description, and a 'Created By' field. The first card is 'Private Student Loan Forgiveness Options' by Hearsay Social, released today. The second is 'Disney Is Finally Fixing the Worst Things About Its Theme Parks...' by Nav Hearsay, released today with an expiry of May 11, 2023. The third is 'Doctors and Healthcare Providers: How Small Business Loans Can Help You...' by Hearsay Social, released today. The fourth is 'Gen Z Isn't the 'Snowflake Generation'...' by Nav Hearsay, released today with an expiry of May 11, 2023. All cards show 'Not published' and 'No engagements'.

Post Library Definitions

- **Suggested:** Pre-approved content created and curated by your organization; available for instant publishing or scheduling use
- **Prereleased:** Pre-approved content that is coming soon but is not yet available to be published
- **Campaign:** Content that is part of a campaign and is currently scheduled to be published at a later date
- **Scheduled:** Content a user has chosen to schedule for a later publishing date
- **Published:** Content that has been published to social accounts
- **Denied:** Content that was deemed outside of compliance by your organization
- **Pending:** Content that is waiting to be approved by your organization

Post Library Filters

Filtering allows users to sort by modification rules, content type, networks, and tags in a new pop-up window.

- **Modification:**
 - **Optional:** Content that does not have to be modified in order to schedule or post
 - **Prohibited:** Content that cannot be modified
 - **Required:** Content that must be modified in order to schedule or post
- **Content Type:**
 - **Message:** Content that contains written text
 - **Link:** Content that contains a web address/third party article
 - **Picture:** Content that contains an image
 - **Video:** Content that contains a video
 - **Event:** Post with event information
- **Tags:** Categories that enable the user to filter content for specific topics of discussion

PUBLISHING CONTENT

You can choose to publish content directly from the pre-approved content list or create your own custom content.

Publishing Pre-Approved Content

Once you have selected a piece of content to post, **click on the desired post**. This will open the publisher window.

Create a New Post

1
Investor Views: 'Global Funds to Help Buy my First House' -
https://www.morningstar.co.uk/uk/news/220196/investor-views-
%e2%80%98global-funds-to-help-buy-my-first-house.aspx

2
Investor Views: 'Global Funds to Help Buy my First House'
Investor Views: 'Global Funds to Help Buy my First House'
https://www.morningstar.co.uk/uk/news/220196...

3
Accounts

4
Post Time Now

5
Post Target Off

Cancel Publish

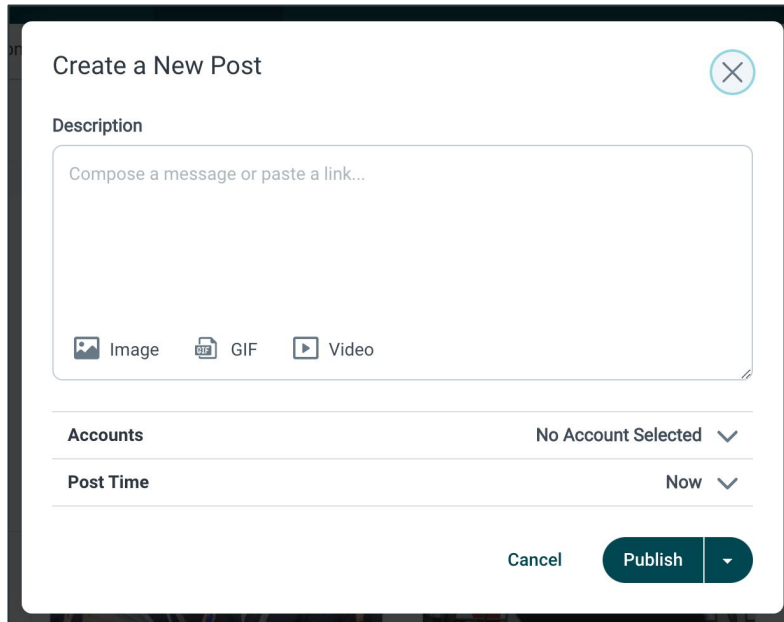
1. Depending on your organization's compliance policy, you will be able to edit the post message (caption) that coincides with the content. If your organization has disabled editing of the post message, you will not be able to edit the caption.
2. If your organization allows for edits to content, you can click on the pencil icon to change the thumbnail image or content.
3. Under **Accounts**, make sure you have selected the box next to your Hearsay Site.
4. A key functionality in publishing content within Hearsay is the **Post Time** functionality. This allows you to schedule a date/time for when the post will publish and be live. Posts can be published instantaneously, at a later date and time, or at a Suggested Time. Hearsay provides Suggested Times to post to social networks based on aggregated data.
5. Click on **Publish**.

Publishing Custom Content

Depending on your organization's compliance policies, you may be able to post custom/original content within Hearsay. Click on the **New Post** button in the upper right hand corner.



This will open up the post publisher.



Create a New Post

Description

Compose a message or paste a link...

Image GIF Video

Accounts No Account Selected

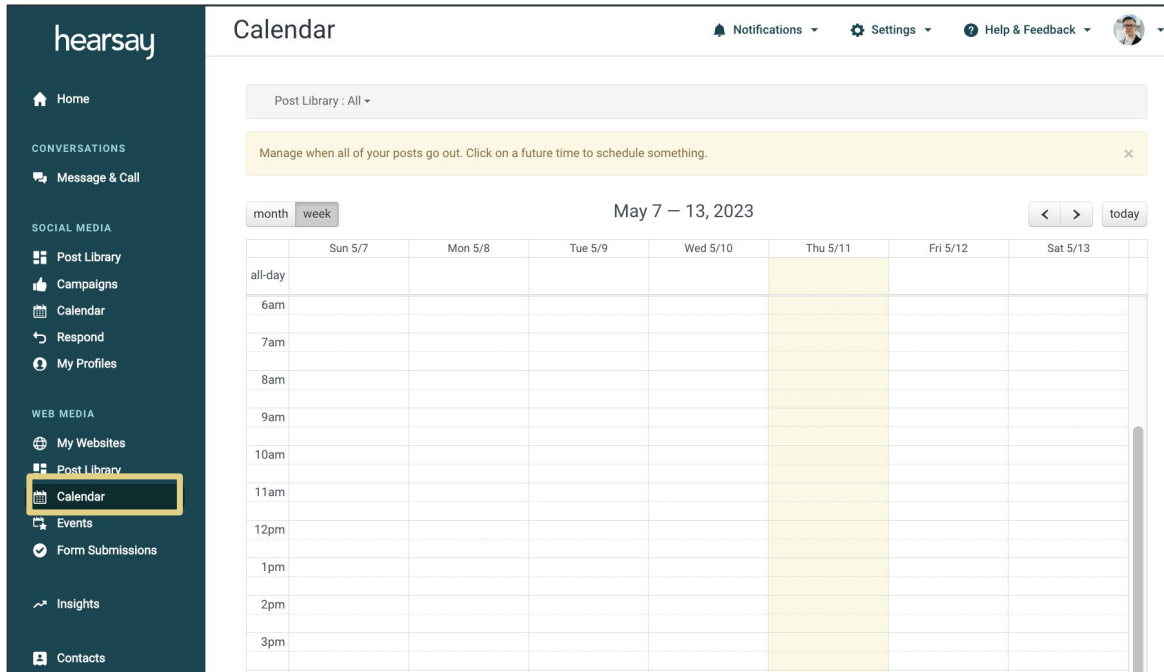
Post Time Now

Cancel Publish

1. Include a message or copy and paste a link, which will pull in the thumbnail, header and subheader. Similar to pre-approved content, this is all editable based on your organization's setup. For example, the link can be removed from the publisher box and replaced with custom text and a call-to-action.
2. If desired, include a photo. *Twitter allows up to four photos to be added. Instagram only allows one photo, while Facebook and LinkedIn allows multiple photos.*
3. GIF (Graphics Interchange Format) - small animations and video footage can be added with your custom post along with a description field for additional text. **Note: Hearsay Social currently only supports GIF publishing to Facebook, LinkedIn and Twitter.**
4. If enabled, upload a video file to publish to either LinkedIn, Facebook, Twitter, or Instagram.

Calendar

The Calendar view will display all of your scheduled posts and allow you to easily make updates to posts. Click on **Calendar** under Web Media to view your scheduled website posts and their current status.



The key at the bottom of the calendar will indicate the status of a scheduled post:

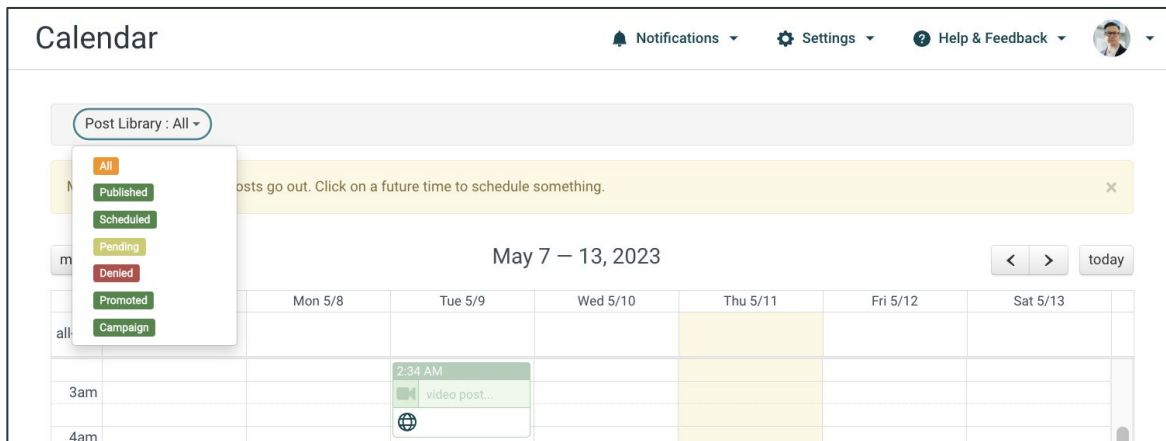
- **Success:** Successfully published or scheduled to publish, with no action required
- **Pending:** Pending review and requires admin action
- **Problem:** Failed to publish for technical reasons, or denied during review process; requires user action to publish

Key

- Success - Successfully published or scheduled to publish. No action required.
- Pending - Pending review. Requires admin action to successfully publish or schedule for publishing.
- Problem - Failed to publish for technical reasons, or denied during review process. Requires user action to re-try publishing.

Post Library Filter

You can filter posts on your calendar using the Post Library filter.



Changing the Date and Time of a Scheduled Post

There are two ways to change the date and time of a scheduled post:

1. Drag and drop the scheduled post to a new date and time on your calendar.
2. Select the scheduled post and change the post time.

Note: For detailed information on accessing and changing the Post Time, refer to the [Scheduling a Post](#) help center article.

Creating a New Post

To create a new post via your calendar:

1. Select the date and time on which you would like to schedule the new post.
2. Create your post using the Publisher tool.

Note: For more information on creating a new post, refer to the [Creating a New Post](#) help article.

Unscheduling a Post

To unschedule a post:

1. Select the post to unschedule on your calendar.
2. Click on the Schedule button dropdown.
3. Select **Unschedule**.
4. Select **OK** in the confirmation pop-up box.

Events

The Events view will display all of your upcoming events and allow you to schedule events to be published to your site. Click on **Events** under Web Media to access your events.

Events are grouped by their status in the review and publication cycle:

- **Published:** Events that have been successfully approved and published
- **Pending Approval:** Events that are awaiting approval from your organization
- **Denied:** Events that were denied approval by your organization

To filter the list of events by their approval status, select the appropriate status on the top left of the screen.

Create a New Event

Click on the **New Event** button on the top right of the screen to create a new event. This opens the event publisher so you can populate the event details.

The screenshot displays the Hearsay Events interface. On the left is a dark sidebar with the Hearsay logo and navigation options: Home, Conversations (Message & Call), Social Media (Post Library, Campaigns, Calendar, Respond, My Profiles), and Web Media (My Websites, Post Library, Calendar, Events, Form Submissions). The 'Events' option is highlighted with a yellow box. The main content area is titled 'Events' and features a top navigation bar with 'Notifications', 'Settings', 'Help & Feedback', and a user profile icon. A 'New Event' button is located in the top right corner, indicated by a teal arrow. Below the navigation bar, the 'Event Library' section is visible, with a teal arrow pointing to the 'Published' filter. The main content area shows '11 Site Events' for the month of 'November'. A specific event card is displayed for '11/24/2023 12:00 PM EDT' titled 'Wine tasting in November', with the address '600 Harrison Street, Suite 120, San Francisco, CA 94107 (Hearsay's SF HQ location)'. A photo of people at a wine tasting is shown below the text. The page footer indicates 'Page 1 of 1'.

Enter in all the event details that you want to share with your clients and prospects.

The fields you'll want to enter for a new event include:

- **Title:** the name of the event
- **Where:** the location of the event (physical address or link to virtual event)
- **Location Title:** display name (optional)
- **Description:** include a message or link for the event
- **Event Image:** option to upload a photo related to the event
- **Start Time:** start date and time of the event (defaults to your time zone in Hearsay but will display on your site in the local time zone of the viewer)
- **End Date Toggle:** if turned on, select the end date and time
- **Accounts:** select the site to which this event should be published
- **RSVP:** select how guests should indicate if they are attending the event (email, registration link, phone number, or form submission)

Based on your organization's policy, you will be able to either publish the event in the moment or submit it for approval before it can publish.

Note: For RSVP email, phone, or link, you will need to provide the email address, phone number or URL for the RSVP submission. For the form option, an RSVP form will appear on the event page and will collect respondent information as a lead.

Edit an Event

To edit an event, click on the event you want to edit. The publisher will open and the event can be edited. Depending on your organization's policy, you may need to request approval to publish an event that has been edited.

Edit Event ✕


Your message was posted to the following accounts:
TEST-schultzwealthmanagement

Title
Winter Food Drive

Where
 Address (eg. 600 Portland Avenue S., Suite 100 Minneapolis)
 Simple text (eg. Zoom, Live online broadcast, etc.)
Zoom Link Provided soon

Description
B I U

Please join us and help pack up boxes from our canned food drive. All donations are welcome!



Start Time

Date	Time
12/13/2022	12:00 PM

Has End Date?

Date	Time
12/13/2022	12:00 PM

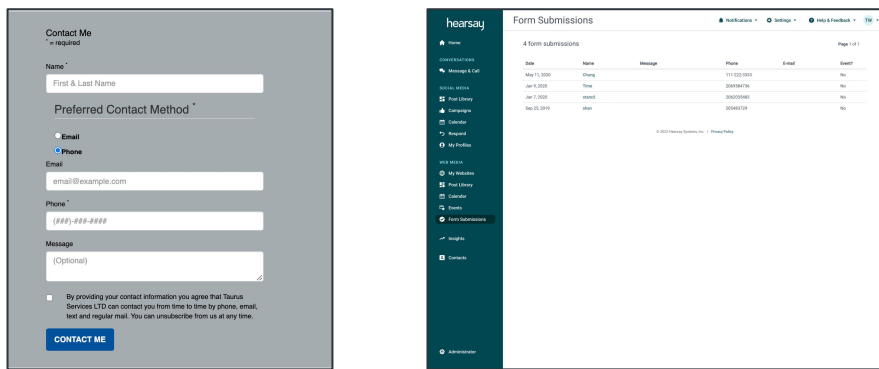
Accounts + ▼

RSVP customereducation@hearsaycorp.com ▼

Cancel Update ▼

Form Submissions

Sites that include the **Contact Us** form will allow your site visitors to enter their contact information and a message that will go directly to your Hearsay platform. You can review these form submissions in **Form Submissions**. The list includes the date the form was submitted, the contact name, the message, their phone number, email address, and whether or not the contact RSVP'd to an event. If you also have Hearsay Relate, this form submission can opt-in the contact for compliantly texting with you.



Clicking on the message will expand the submission for you.

Date	Name	Message	Phone	E-mail	Event?
Dec 24, 2021	Louis Nicotri	Please text me. Additional Information The follow is additional information from the contact request: Preferred Method of Contact phone	8605140713	Inicotri@hearsaysystems.com	No

Each form submission will also create new contact for you. Clicking the name or email address will open the contact information within **Contacts**. You can edit the contact information in this view.

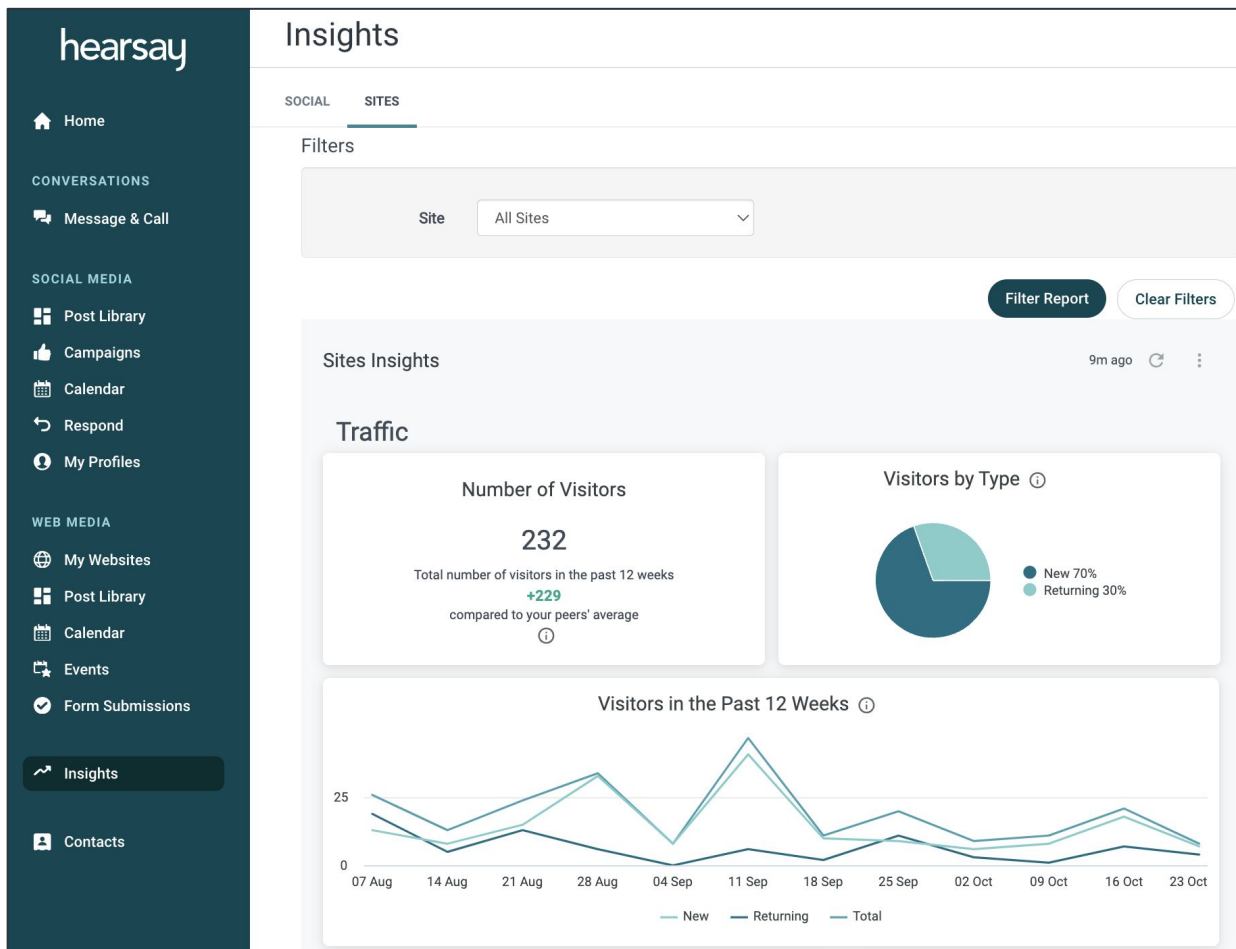


Insights

The Sites Insights dashboard provides key business metrics at the individual Site level over a three-month period, performance benchmarking against other users in their hierarchy, as well as recommended actions to increase Site visits and improve lead generation. These metrics include:

- Number of visitors with a breakdown of new and returning visitors
- Average time spent on the Site
- Number of visitors by source type (e.g. Google Paid, Organic, Social)
- Number of leads (based on the number of visitors who have submitted contact forms)
- Lead types (based on whether the contact form was submitted as an event RSVP or whether the lead was sourced from the standard contact form).

Lead statistics on the Sites Insights dashboard are only available to customers using Hearsay lead forms.



End-users will also see personalized recommendations that provide guidance on what they can do differently to improve their website performance.

