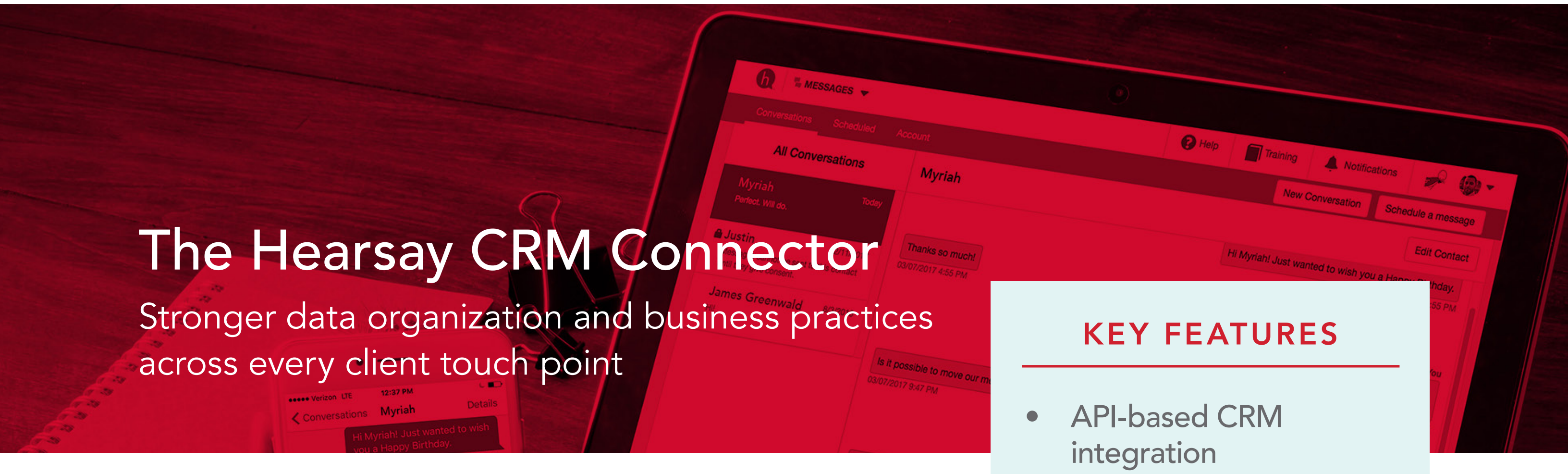

The Hearsay CRM Connector

Stronger data organization and business practices across every client touch point

KEY FEATURES

- API-based CRM integration
- Seamless, two-way contact data sync (name, email, phone number)
- Integrated advisor-client activity data
- Support for deep linking between Salesforce and Hearsay for 1-1 advisor-client engagement

Hearsay's Advisor Cloud solutions empower advisors to efficiently and compliantly engage with clients across digital channels for stronger relationships that grow their business. With Hearsay's solutions, advisors can communicate with clients at key moments on social media, websites, text messaging and email in compliance with complex company policy and industry regulations.

The Hearsay CRM Connector syncs your company's contact records with advisor digital activity for stronger data organization and better communication across channels. By integrating your CRM system with Hearsay, your client data becomes more actionable at every stage of the sales funnel – from prospecting across social media and websites, to driving one-to-one engagement over email and text. With unified data and a more complete picture of a client's life, advisors can engage in a smarter, more relevant way across every touch point. The solution is highly configurable and can be tailored to your existing business processes, data requirements, and compliance standards.

STREAMLINE DATA ACROSS SYSTEMS

By syncing contact data from your CRM with advisor-client records from Hearsay, advisors will benefit from streamlined, complete client information across systems. Our seamless, out-of-the-box integration between your CRM system and Hearsay breaks down silos and pulls information from Hearsay into the corresponding record in your CRM system.

- Match, import and export contacts between Hearsay and CRM system
- Automatically sync advisor-client interaction data (no manual data logging) saves your team time
- Maintain system of record for client data so updated contact information in Hearsay is automatically synced in CRM system
- API access to contact and activity data

A MORE COMPLETE VIEW OF ADVISOR-CLIENT ENGAGEMENT

The more you know about your clients and prospects, the more strategic and targeted your field team can be. With a full view of client behavior across digital channels, advisors can act on business-critical data – nurturing leads with targeted messaging and communicating with clients based on actionable triggers.

- View and engage with existing CRM contacts from Hearsay
- Enable advisors to communicate with CRM contacts through Hearsay apps (social media, websites, text messaging and email)
- Provide corporate-driven recommended advisor actions for lead and campaign follow-ups, upcoming renewals or market information

STRONGER BUSINESS PRACTICES AND PRODUCTIVITY

Your CRM system and Hearsay apps offer even greater benefits when they're integrated into a unified solution. Your team can begin to measure field productivity by looking at advisors' client response time, frequency of touch and relevance of specific digital channels across the client lifecycle. By analyzing advisor-client activity and data across the field, your team will develop a best practice playbook you can use for recruiting and development.

- Correlate sales data from CRM system with advisor-client activity across digital channels
- Measure advisor productivity from your CRM system by measuring frequency and value of client interactions
- Surface highest-impact advisor-client engagement across field team to build best practice playbook

Key details on how the integration works

Activity Data

- Social media interactions with specific contacts (LinkedIn not included)
  - Comments and /replies on advisor posts
  - Likes and /favorites on advisor posts
  - Private messages (Facebook Messenger, Twitter DMs)*
- Website lead form interactions
  - Newly filled out lead forms automatically create new Lead/Contact objects with lead form data incorporated into the object
- SMS interactions
  - SMS text sent to contact
  - SMS text received from contact*
- Email interactions
  - Email sent to contact
  - Email opened by contact
  - Email link clicked by contact

Salesforce Integration

- API-based Salesforce integration automatically syncs contacts and provides two-way sync of contact information and associated contact activities
- Connect via OAuth for your entire organization

Contact Data

- Two-way synchronization of information about Contacts
- Data below may be updated through actions taken in either system, and both systems will be kept in sync:
  - First and last name
  - Email address
  - Phone number

*coming soon

ABOUT HEARSAY SYSTEMS

Hearsay Systems offers leading Advisor Cloud solutions for financial services, empowering advisors to efficiently and compliantly use social media, websites, text and email to engage with customers, build stronger relationships and grow their business. Built for the enterprise, Hearsay connects these advisor-client interactions and data to corporate CRM systems and digital marketing programs, and provides efficient compliance supervision and review workflows – all on a secure, enterprise-ready platform.

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