hearsay SYSTEMS salesforce financial services cloud

Supercharge advisor production

Today's Financial Services clients are savvier than ever; they're well-informed, hyper-connected, on multiple devices and engaging on multiple channels. They're also looking for advisors who can meet their rising expectations for a personalized customer experience.

Hearsay and Salesforce have partnered to empower your advisor teams to understand and communicate with clients seamlessly, using a complete system of deep knowledge and high-touch engagement at scale.

advisor cloud

The Hearsay Advisor Cloud enables your field with efficient and compliant client engagement tools across social media, messaging, voice, and websites. By automating time-consuming tasks and driving high-value workflows unique to financial services, Hearsay is purpose-built to help advisors grow their book of business at scale. With compliance built-in, Hearsay provides a platform to easily and scalably meet regulatory guidelines [SEC, FINRA, etc].

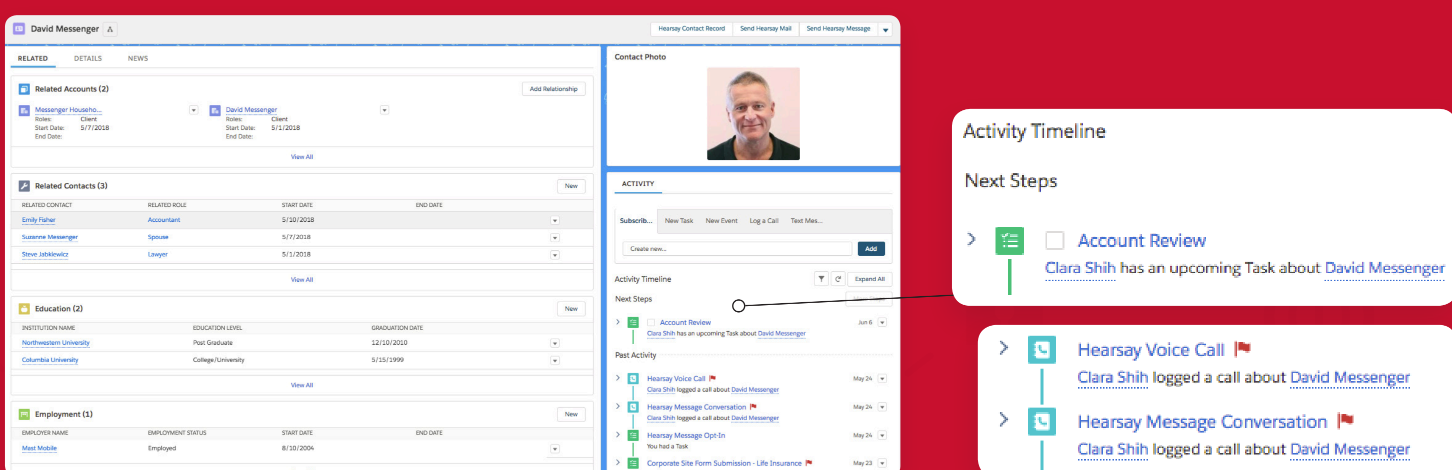
salesforce financial services cloud

Like Hearsay, Salesforce Financial Services Cloud is explicitly designed to help the financial advisor work smarter. Built to personalize interactions and simplify tracking of financial goals, the Financial Services Cloud helps advisors spend less time on administrative tasks and instead focus on delivering exceptional client outcomes. Across wealth management and insurance, firms turn to the Financial Services Cloud to build richer customer relationships.

Hearsay + Salesforce Drives Client Engagement

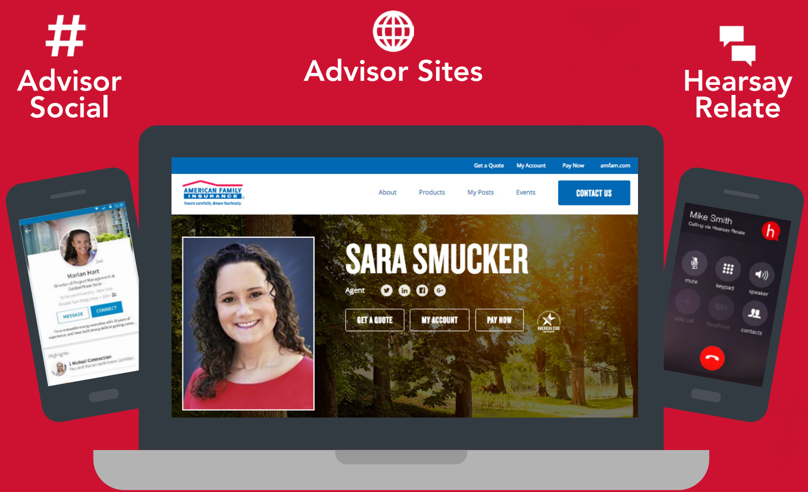
Salesforce's contextual client profiles allow instant access to the information advisors need to deliver personalized advice that earns lasting loyalty. But that context is only valuable when you have a complete picture of client activities. Hearsay integrates with Salesforce FSC to instantly and seamlessly capture all your advisors' client engagements in a single, complete system of record.

Together, the Hearsay Advisor Cloud and Salesforce Financial Services Cloud enable financial services companies to transform the customer experience across channels. Buoyed by Hearsay's rich client engagement data, Salesforce's integrated dashboards and AI capabilities surface actionable insights on clients as well as their household relationships and valuable business networks. Together, Hearsay and Salesforce help advisors connect to clients – and their families – in a whole new way.



The Advisor Cloud Advantage

Teams using Hearsay Advisor Cloud are readily compliant, high-touch at scale, and on the same page, across the organization.



Modernize your social marketing and selling

Nurture clients with pre-approved content then connect one-on-one with Advisor Social, the leading social selling solution for financial services.

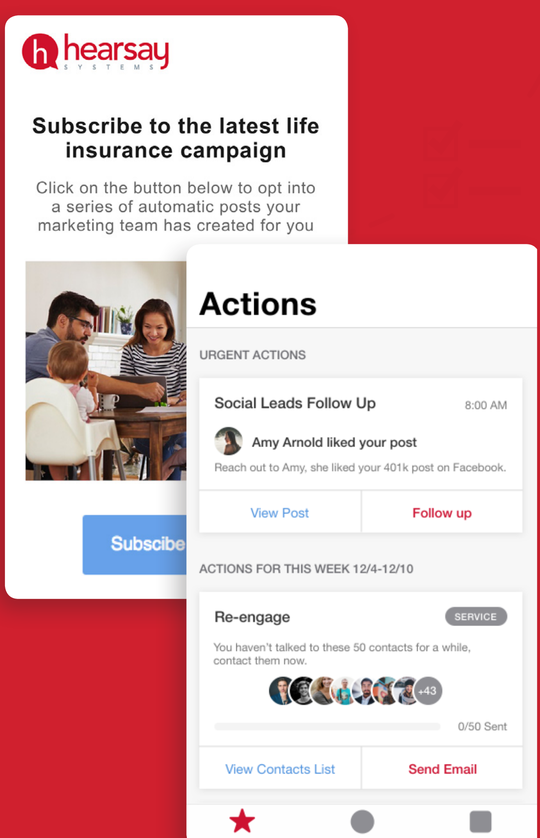
Funnel more prospects to your advisors

Boost your brand, consistently and at scale, with local websites. Integrate cutting-edge SEO with modern, mobile-friendly design that drives more local leads to your advisor websites.

Move business forward with compliant texting and voice

Hearsay Relate combines texting, high quality voice calls, and workflows that scale outreach so advisors can engage clients on their preferred channel, compliantly.

Master Team Productivity



Automate & Delegate One-to-Many

Free up advisor time with turnkey workflows, using curated, integrated content. Advisors subscribe to marketing-led 1-to-many automated campaigns across social and sites to generate top-of-funnel leads.

Facilitate High-Value One-to-One Conversations

Orchestrate and track compliant follow-up workflows through social, emails, and texting, triggered by CRM and social signals, to nurture leads and deepen client relationships.

Stay Compliant with Built-in Tools

Efficiently supervise multiple advisor communication channels from one dashboard and intelligently automate aspects of the supervision process, such as Contextual lexicon monitoring to block potentially harmful messages from ever going out.

Capture Data for Actionable Analytics

Get up to 15x the data you usually do on client interactions, automatically synced to Salesforce,to drive the next best action. Field-level data enriches AI insights from Einstein, drives more accurate and critical workflows, and provides a comprehensive view of client relationships.