



# 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.



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].



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.

RELATED CONTACT	RELATED ROLE	START DATE	END DATE
Emily Fisher	Accountant	5/10/2018	
Suzanne Messenger	Spouse	5/17/2018	
Steve Jablonewicz	Lawyer	5/1/2018	

INSTITUTION NAME	EDUCATION LEVEL	GRADUATION DATE
Northwestern University	Post Graduate	12/10/2010
Columbia University	College/University	5/15/1999

EMPLOYER NAME	EMPLOYMENT STATUS	START DATE	END DATE
Met Mobile	Employed	8/10/2004	

**Activity Timeline**

**Next Steps**

- Account Review  
Clara Shih has an upcoming Task about David Messenger

**Past Activity**

- Hearsay Voice Call  
Clara Shih logged a call about David Messenger
- Hearsay Message Conversation  
Clara Shih logged a call about David Messenger
- Hearsay Message Conversation  
Clara Shih logged a call about David Messenger
- Hearsay Message Opt-In  
You had a Task
- Corporate Site Form Submission - Life Insurance  
Clara Shih had a Task about David Messenger

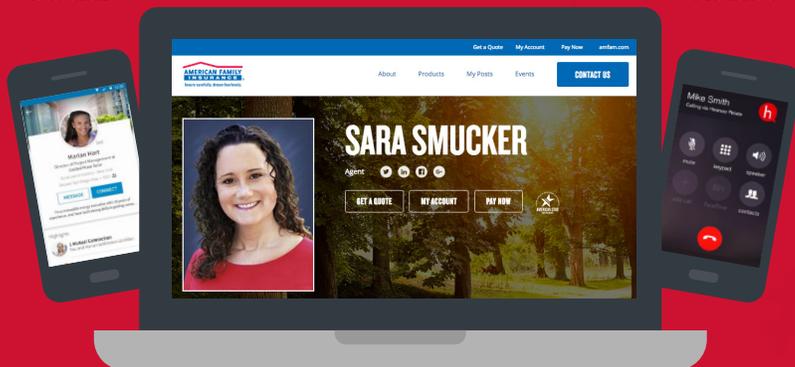
# The Advisor Cloud Advantage

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

#  
Advisor  
Social

Advisor Sites

Hearsay  
Relate



# **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



### Subscribe to the latest life insurance campaign

Click on the button below to opt into a series of automatic posts your marketing team has created for you



Subscribe

### Actions

#### URGENT ACTIONS

Social Leads Follow Up 8:00 AM

Amy Arnold liked your post  
Reach out to Amy, she liked your 401k post on Facebook.

View Post

Follow up

#### ACTIONS FOR THIS WEEK 12/4-12/10

#### Re-engage

SERVICE

You haven't talked to these 50 contacts for a while, contact them now.



0/50 Sent

View Contacts List

Send Email



### 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.