

Getting Started with Hearsay Social

HARNESS THE POWER OF SOCIAL MEDIA WITH ADVISORS TO
GROW YOUR BUSINESS

WHAT'S INCLUDED?

- Hearsay Social Overview
- Getting Started

Course Materials:

- PDF (2 pages)
- Estimated Time: 15-20 minutes

Getting Started with Hearsay Social

Hearsay Social Overview

Welcome to Hearsay Social. Growing your business on social involves being findable on your social media networks, growing your network, researching and acting on social signals, and building credibility.

There is no question that the world has gone digital. The majority of the population is online, and it's quite possible that all of your target customers are there already.

Without the right tools, success on social media fight feel out of your grasp. You might not know what to say, fear complex regulations and policies, and feel overwhelmed by all the noise online.

Hearsay Social helps you tackle each of these fears.

Content Library and Proven Methodology for Success

Hearsay Social lets you easily publish content across networks, distribute content based on region and role, schedule content in advance, and analyze engagement metrics to optimize your content strategy.

Your success on social media doesn't just stop there. Hearsay has a four-step methodology called "Be, Grow, Hear, and Say" that will ensure your success. Our Customer Success team is dedicated to making sure that your social media content strategy is the best that it can be.

Best-In-Class Supervision and Compliance Solution

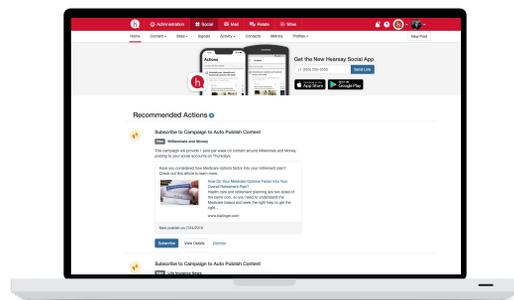
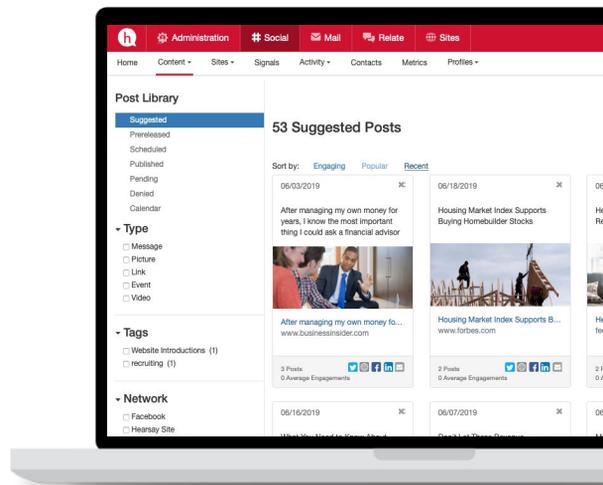
Our compliance solution is built right into the Hearsay Social platform and ensures efficient protection at scale. API integrations capture your social media activity from any point – from Twitter favorites to private messages to Facebook comments.

There's also a seamless review process for social media profiles, in addition to social media posts. You'll never have to worry about whether you're compliant.

Streamlined Social Experience

Prioritize your top opportunities for engagement:

- All social activity in one place – View all of your social media activity, including comments, replies, likes, shares, private messages, and more, all in one place.
- Natural language processing and algorithms – You'll never have to weed through thousands of updates for key social signals.
- Life event alerts – Stay up-to-date with important money-in-motion events that your clients experience so you can reach out to the right people at the right time.

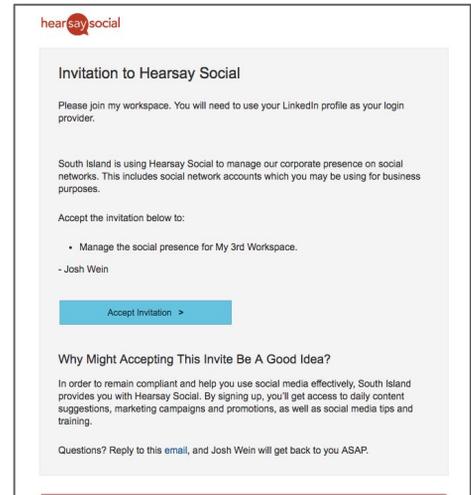
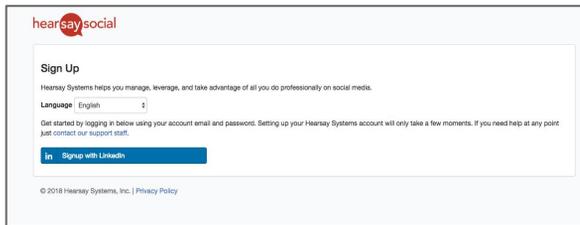


Getting Started with Hearsay Social

Getting Started

1. Select Accept Invitation or the sign-up link in the email you received.
2. Follow your organization's login method, which may be via Facebook, LinkedIn, or your company login. If you are unsure of what login method to use, contact your company administrator.

Remember to always log in using the same method and platform you used to sign up for Hearsay Social.



How to Post Content

There are two types of content that you can post: pre-approved content and custom content. Pre-approved content is content that has been approved by your marketing and/or compliance team. Custom content is content that you created yourself.

How to Post Pre-Approved Content

1. Click on the piece of content in your content library that you'd like to post.
2. Edit the message if you can (this depends on your organization's policies).
3. Select the network(s) you'd like to publish it to under "Social Accounts."
4. Select the "Post Time," which is when the post will go live.
5. Click on "Publish." Your post is now scheduled.

How to Post Custom Content

1. Click "New Post" to open up the publisher.
2. Add a photo, copy and paste a link to a piece of content that will pull in a thumbnail, and type in your social media copy.
3. Select the network(s) you'd like to publish it to.
4. Select the "Post Time."
5. Depending on your organization's policies, you can click "Publish" or "Request Approval."

Activity

Activity displays and allows you to interact with responses to your social media posts. Sort your Activity by Responses, Private Messages, Feeds, and Published Posts using the Activity Menu on the left navigation sidebar or with the Activity tab dropdown. Select a specific Social Account and/or Activity Type from the left navigation sidebar to target results.

Profiles

To meet regulatory and social policy obligations, many organizations require pre-approval of static social networking profiles. If your organization requires static profile pre-approval, you can find the current status of your profile within the Profiles tab. To submit a profile request submission, click Profiles from your main navigation and click Edit Request next to your social account. If your organization has Suggested Profile content or photos, they will be available when inputting this content to new fields in your social profile.