

Getting Started with Hearsay Mail

Help Your Advisors Strengthen Relationships and Sell with Easy Email
Follow-Up

WHAT'S INCLUDED?

- Hearsay Mail Overview
- Getting Started

Course Materials:

- PDF (4 pages)
- Estimated Time: 20-25 minutes

Getting Started with Hearsay Mail

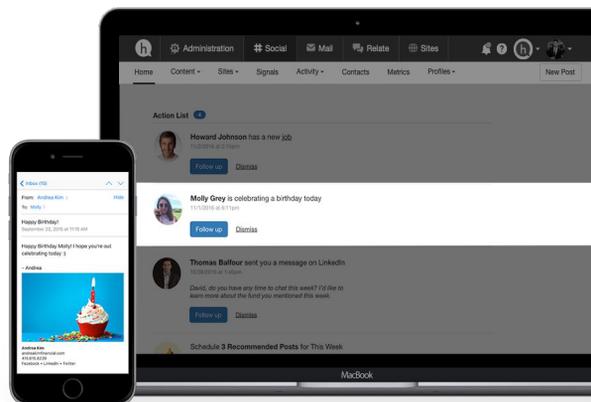
Hearsay Mail Overview

Welcome to Hearsay Mail! Your advisors and agents will be able to personalize the email content you and your marketing team have created for them. This will help them keep in touch with prospects and customers and reach out during important events.

Hearsay Mail allows advisors and agents to email their prospects and clients easily, efficiently, and effectively (with the right message at the right time) in a way that drives sales.

Hearsay Mail differs from the two prevalent types of email tools – email clients like Outlook and marketing automation tools like Marketo – because it includes:

- An advisor-centric user experience (easy-to-use, mobile, and few clicks)
- Industry-specific uses (finserv-focused, sales and servicing activity, tied to account events through content)
- Programmatic data hooks (integration with contact system of truth, contextual data from other sources and Hearsay apps, ability to pull in content from other email systems, etc.)



Better Advisor-Client Interactions, At Scale

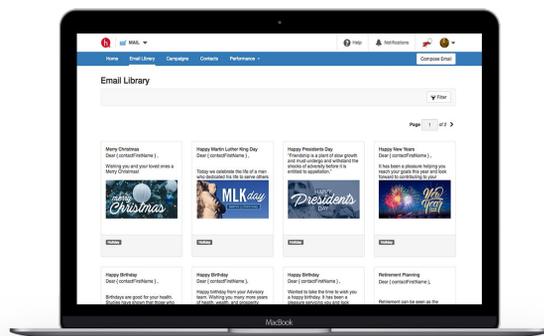
Strengthen relationships and sell with easy email follow-up. With Hearsay Mail, your advisors and agents can:

- Leverage a library of pre-written emails for referrals, billing reminders, holidays, and more
- Nurture clients and prospects with email campaigns
- Use analytics to optimize content and advisor-client outreach over time
- Sync contacts and activity with your CRM
- Prescribe advisor-client interactions based on contact and engagement data

Hearsay Provides Content to Get You Started

Upon logging in to the platform, you'll have access to over 20 email templates with topics ranging from referrals to birthdays and holidays. Some examples of email templates available to you are:

- Birthday card messages
- Holiday cards
- Meeting confirmation emails
- Request a referral emails
- Billing reminder emails
- Annual review emails
- Congratulations emails
- And many more!



Automated Lead Nurturing and Actionable Analytics

Advisors and agents can easily subscribe clients and prospects to personalized email campaigns. They can also optimize content based on the data collected from sent emails.

Upload a list in seconds – Mail merge makes it quick and easy to tie a list of recipients to campaigns.
 See who is engaged – See open, click, reply, and bounce rates and tweak your email strategy accordingly.
 Insights for advisors – See who opens and clicks each email so advisors follow-up with the right person, at the right time.

Getting Started with Hearsay Mail

Getting Started

As an administrator, you are responsible for creating, reviewing, and approving your organization's digital marketing content.

Create

Create New Hearsay Mail Content

Select **Create > Suggested Posts** on the top navigation bar to open your organization's Post Library, which is where content created at the Administrator level is organized and stored.

1. Select **New email** in the top right of the Suggested Posts page.
2. **Insert Showcase Link** adds a link as a central focus of the email that can be tracked to show if the recipient clicked and opened the link.
3. **Insert Variable** to include a variable within the body and subject of your message. You will need to click into the body of the email or into the subject line. Then select **Insert Variable** where you would like to insert the variable. You can utilize both the **Contact Info** and **Agent Info** available from the **Insert Variable** drop-down menu.
4. Once you have configured your Mail template, you can click on **Suggest** to add this to the Suggested Content Library, or you can choose to **Save as Draft**.

Create an Email Campaign

Your corporate marketing team may want to create an ongoing stream of communications to go along with the one-off emails in the Mail Content Library.

End users will be able to subscribe their recipients to themed content channels that push out emails at a cadence specified by the marketing team.

1. Select **Create > Mail > Email Campaigns**.
2. Select **New Email Campaign** in the top-right corner of the Email Campaign Library page.
3. Fill in the campaign **Name** and **Description** (both fields are required). You can also choose a file to upload as the Campaign Image. Once done, click **Save**.
4. Click **Compose Email** to create email campaign content.
5. When finished, click **Send** or **Save as Draft** to save your changes for later review.

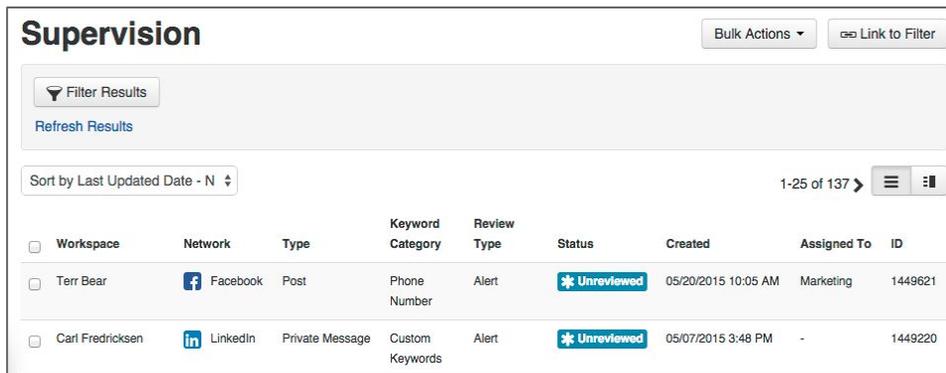
Getting Started with Hearsay Mail

Review

The Review tab is where you can monitor user Mail activity within your organization. Select Review > Supervision on the top navigation bar to locate your organization's compliance workflow.

Supervision

Universal Supervision is a review and approval system that unifies all your review items into one display. Supervision displays both alerts and approval requests, while providing you with the ability to filter and sort your review items to create a more streamlined compliance process for your supervision team or administrators.



<input type="checkbox"/>	Workspace	Network	Type	Keyword Category	Review Type	Status	Created	Assigned To	ID
<input type="checkbox"/>	Terr Bear	Facebook	Post	Phone Number	Alert	Unreviewed	05/20/2015 10:05 AM	Marketing	1449621
<input type="checkbox"/>	Carl Fredricksen	LinkedIn	Private Message	Custom Keywords	Alert	Unreviewed	05/07/2015 3:48 PM	-	1449220

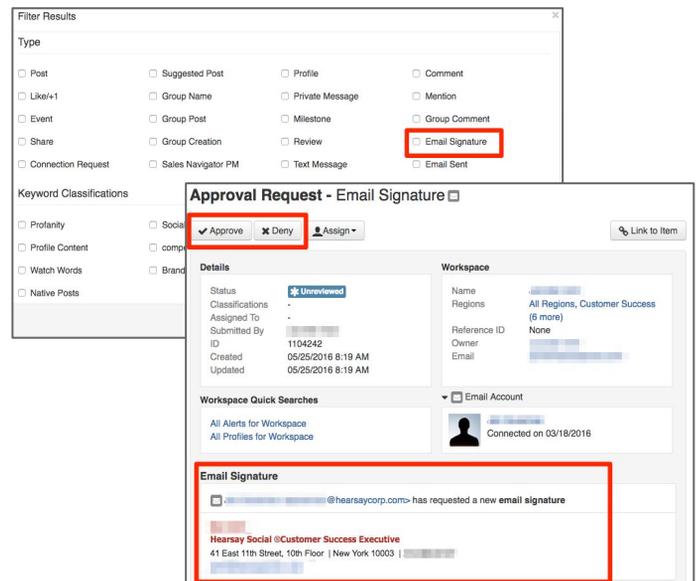
Email Signature

In order to meet regulatory and social media policy obligations, many organizations require pre-approval of Email Signatures. This will require your end users to submit their signatures for approval before they can be used in emails.

However, this feature can be disabled and admins can configure whether they wish to review email signatures in their Settings > Review & Archive section of Hearsay Mail.

In the Custom Search area, select filter results and choose Email Signature to find any Email Signature approval requests. From here, you can choose to Approve, Deny, or Assign the requests.

Note: You will find additional Approval Request information in the Hearsay Social Admin Guide.



The screenshot shows the 'Approval Request - Email Signature' interface. It includes a 'Filter Results' section with 'Type' and 'Keyword Classifications' filters. The 'Type' filter has 'Email Signature' selected. The 'Approval Request' card shows the status as 'Unreviewed' and options to 'Approve', 'Deny', or 'Assign'. Below the card, the 'Email Signature' details are shown, including the user's name, workspace, and email address.

Lexicon Review

In the Supervision tab, you can use the compliance workflow to find alerts regarding your Lexicon words. By default, these Lexicon terms will mirror your Lexicon terms for Hearsay Social. You can also add individual Lexicon words that are Mail-only (or also Social-only).

Marketing Content Supervision Workflow

In the Supervision tab, you can use the compliance workflow to find alerts regarding sent emails.

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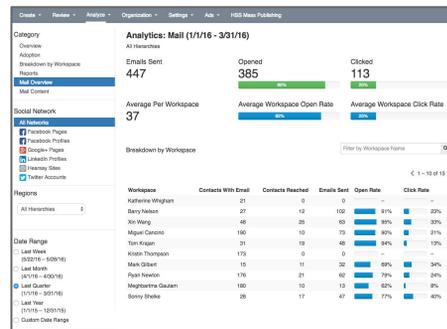
Analyze

The Analyze tab is where you can monitor all workspaces and their usage, success, and performance with the product.

Mail Overview and Content

The Analyze > Mail Overview section displays analytics for all workspaces based on the designated date range selected.

To view more information on a particular piece of Mail content, select View Report.



5 things every agent's website should have
Hi {{ contactFirstName }},
Thought I'd share this article detailing the five essentials every agent website should have, to better attract and retain clients and prospects in an increasingly digital world. Worth a read!

Last Email Sent May 30, 2016

Best,
{{ agentFirstName }}

<http://www.lifehealthpro.com/2016/01/01/5-things-every-agents-website-should-have>

348 Recipients
124 Opened Email

6 Clicked Link

View Report

Settings

Enable Hearsay Mail

As an administrator, you can enable or disable Hearsay Mail. Go to Regional Settings and locate Networks > Available Social Accounts > Hearsay Mail.

Email Disclaimer

You can create or edit your organizations Email Disclosure Statement. This will append a disclaimer at the bottom of Hearsay Mail content, and can be customized for different hierarchies. Within Regional Settings locate Mail > Mail Settings.

Email Settings

Set minimum font size in emails to 16px. This prevents all text within the body of Hearsay Mail content from being any smaller than the default web browsing font size used in Google Chrome, Internet Explorer, and Mozilla Firefox. Please note that this is a California requirement.

Email Lists

- **Setting Up Blacklists** – Organizations can provide "do not email" lists of individuals who have opted out of corporate email communications. Hearsay Mail can use this blacklist to prevent end users from emailing these contacts. To set up blacklists, the administrator can send over a consolidated blacklist to their Customer Success Manager, who will upload the list into Hearsay Mail.
- **Setting Up Unsubscribe Lists** – To acquire this feature, please request this during implementation. Hearsay stores these unsubscribe lists and prevents end users from sending emails to recipients who have unsubscribed. To gather the unsubscribe list data, an organization can request downloads of these unsubscribe lists through the CSM or via an API.