hearsay

Action Flows Admin Guide

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Orchestration and Automation

Enterprise Actions allows you to initiate a series of compliant text messages on behalf of users to deliver consistent, better outcomes in critical sales and servicing scenarios

- **Orchestration at scale**: Workflows and deep integration capabilities drive more productivity and efficiency across the field
- **Guide proactive communications**: Deliver consistent engagement and deepen client relationships
    - Automate immediate outreach that drives better outcomes for sales and servicing scenarios
    - Proactively guide conversations by orchestrating a series of texts (drip messages)
    - Tailor messaging with localization
    - Gain a comprehensive understanding of outreach efforts with closed-loop analytics
- **Actioning your Salesforce instance**: Hearsay can leverage key triggers from Salesforce to automate outreach and capture all orchestrated activity into Salesforce
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    - Contact record details (relationship details, etc.)
    - Lightning flows
    - Next best action
    - Marketing journeys

Example: A look at how firms can automate and accelerate **renewal sales**

Ingest renewal data

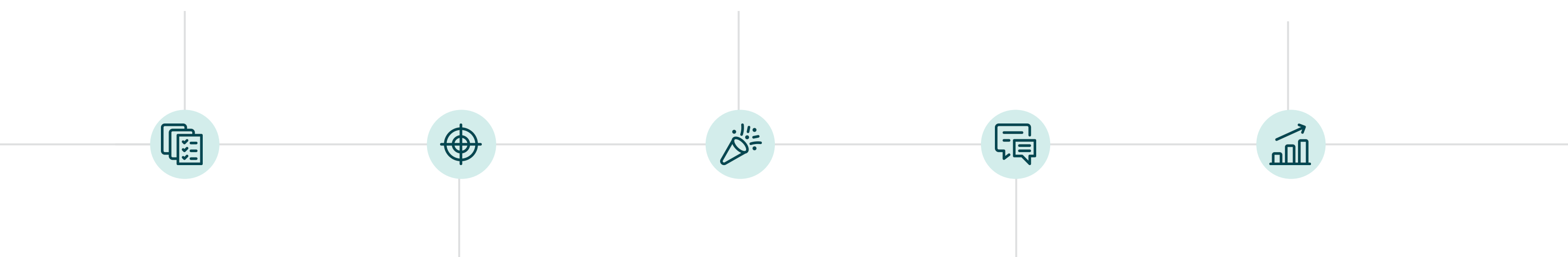
Hearsay integrates pertinent renewal data (date, policy, etc.)

Trigger text message

Automate initial 1:1 message from advisor/agent

Automate data capture

Determine efficacy, enrich records, and optimize approach



Map outreach

Align data with relevant advisor/agent

Facilitate discussion

Text outreach provent to drive higher engagement and renewal rates

Contact Messages

After a contact is successfully inserted, Actions will start an active thread to orchestrate engagement with the contact by sending an automated message.

The text message can be defined at the organization level. This means all automated outreach text messages to contacts in that organization will have the same standardized text. The text may include <form fields> that the system will populate with the relevant text.

The default text message if working hours behavior is not configured will be:

“Hi <Contact First Name>, This is <Agent Nickname> from <Org Name>. I’m working on a quote for you and will get back to you shortly. Is there a time that works best for your schedule?”

When working hours are activated, the text will be adapted to the time of day. The text message sent will be determined by when the contact comes in. A different text will be sent if the contact comes in during business hours versus if it comes in after business hours or over the weekend.

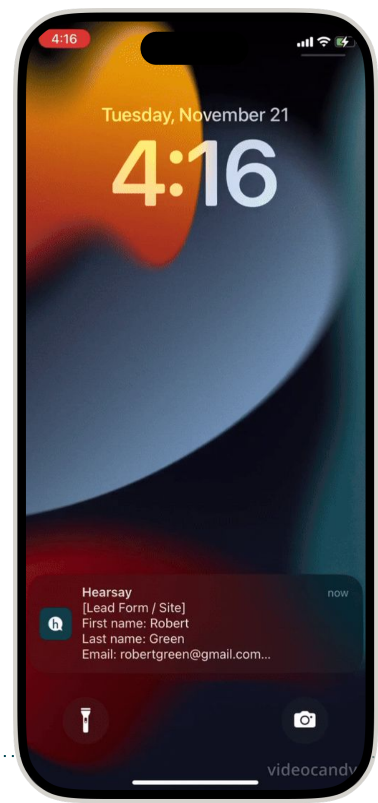
The default text message outside working hours is:

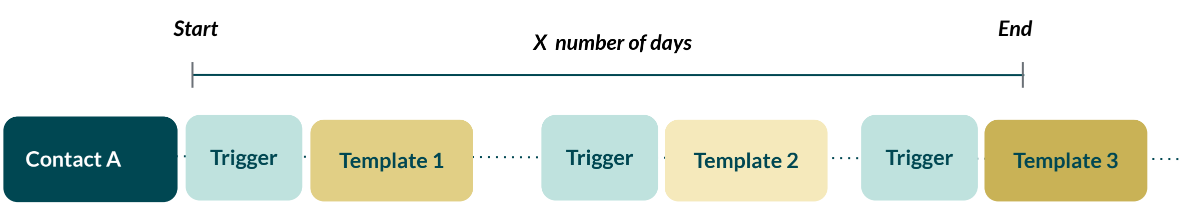
"Hi <Contact First Name>, This is <Agent Nickname> from <Org Name>. I'm working on a quote for you and will get back to you during business hours. Is there a time that works best for you?"

- If the message is successfully delivered, the action flow continues by notifying the agent.
- If the message cannot be delivered, the agent will not receive a notification that the contact cannot be reached via the available number. The action flow stops.

Drip messaging

Drip messaging delivers personalization at scale by initiating a series of compliant text messages on behalf of users. This proactively guides conversations by orchestrating a series of texts to drive better outcomes in critical sales and servicing scenarios. This automates immediate outreach, as well as configurable follow-up messages to increase response rates and boost results.





Contact Message Templates

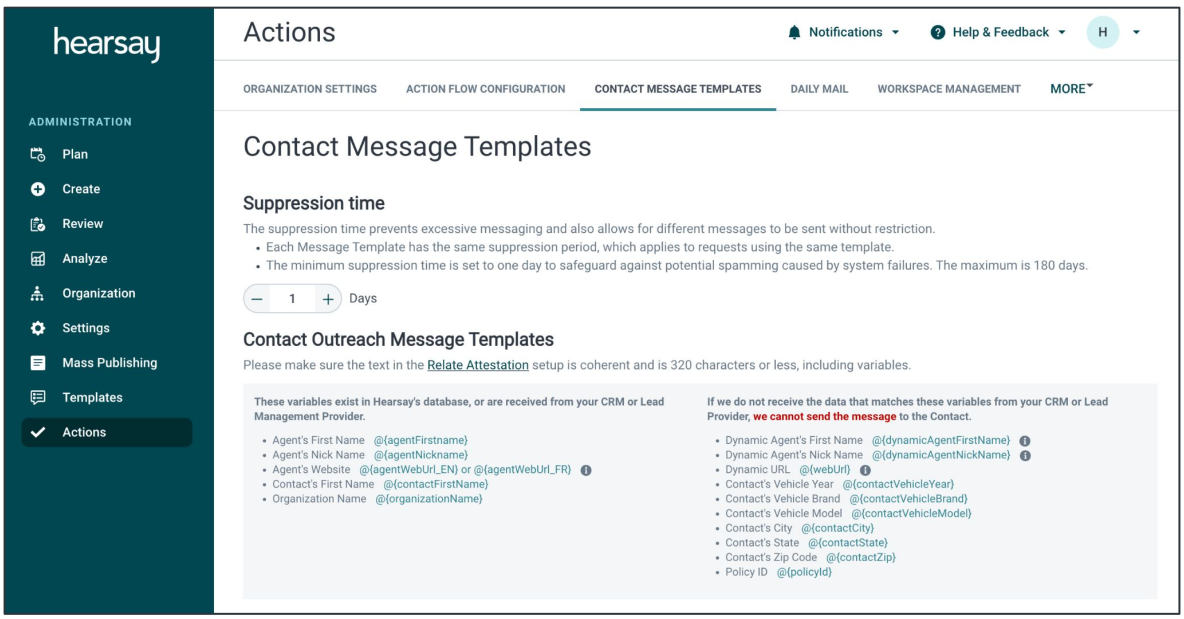
There are several use case message templates to choose from with a number assigned to each one. There is also a system default template as a fall back option. Organizations can select which use case template to use by specifying the corresponding template number in the API, and Admins can configure the language from the Contact Message Templates page. Each template has a version to use during business hours and one to use after hours, and the system reverts to the appropriate version based on the time the message is sent. If no template is selected, the system will use a default. Templates also all have multi-language support and language changes can be monitored for compliance.

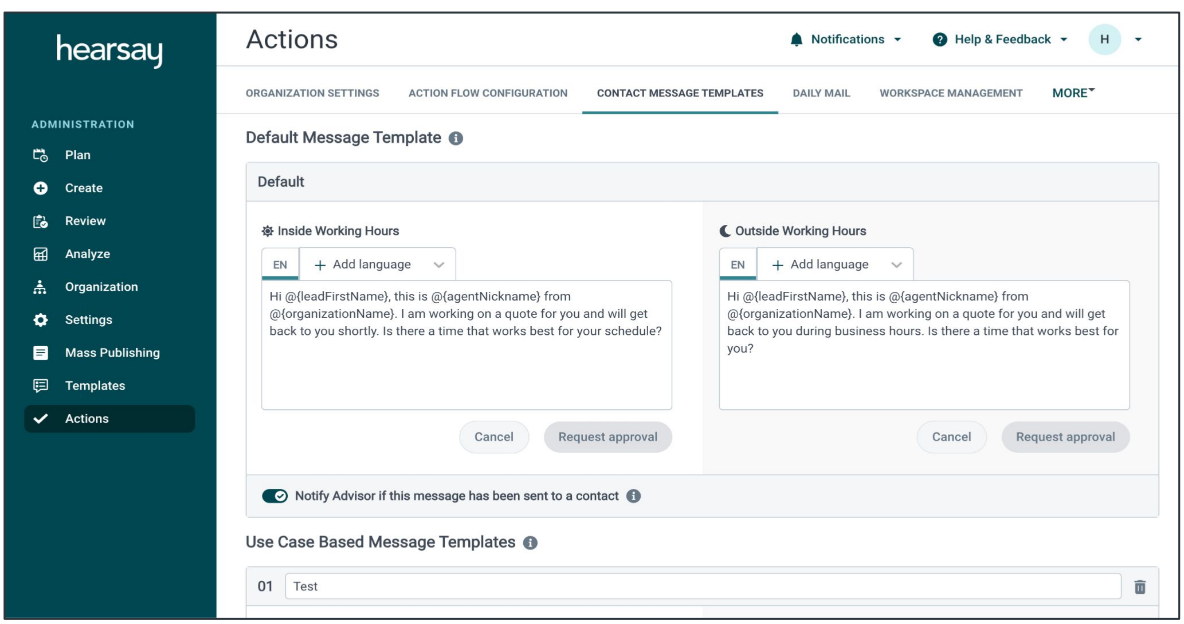
To add new variables to the API requests that trigger the start of Action workflows, contact your Customer Success Manager. Organization Administrators can include the new variable names to the message template text.

Editing Contact Message Templates

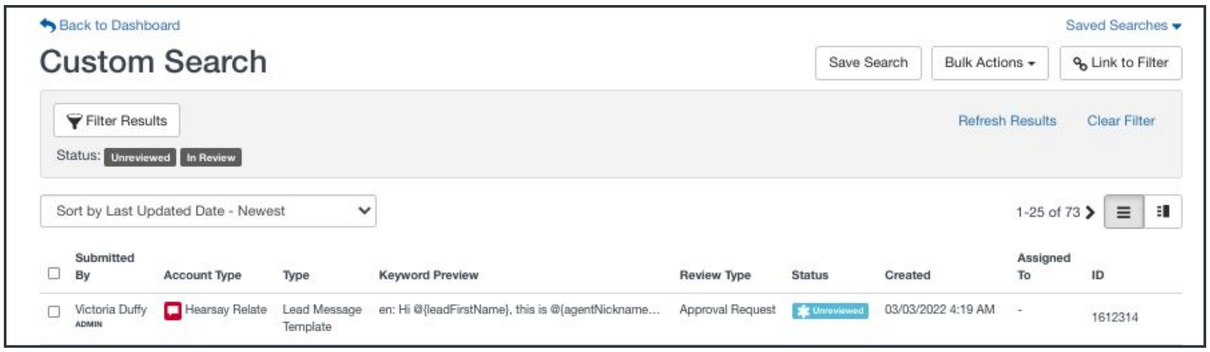
Admins can add and edit up to 40 message templates, giving you flexibility and customization options. If your organization requires that the template is submitted to compliance, you can send it to compliance check through Hearsay.

When logged into your Administration view, navigate to **Actions > Contact Message Templates**.

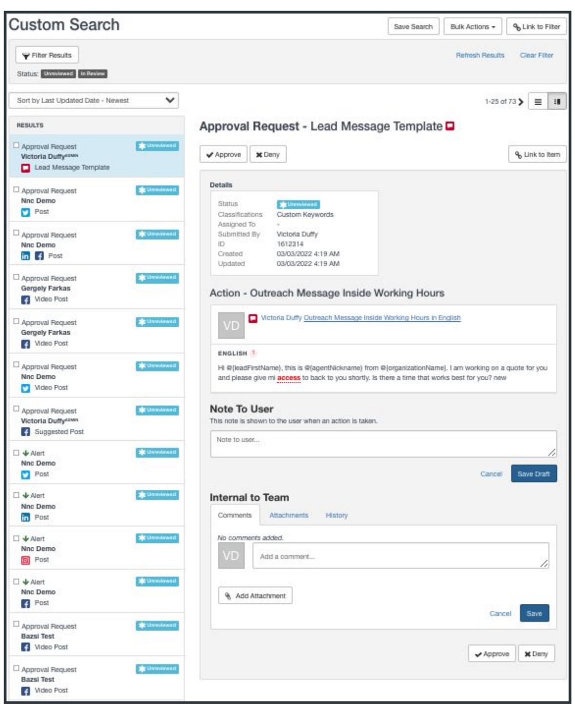




If your organization does not require compliance review via Hearsay, the message verbiage changes will be applied to all outgoing messages after saving the changes. If the message does go through compliance review via Hearsay, the earlier version of the message template remains in use until the new verbiage is approved. Once the new verbiage is approved, the new message template will be used in all messages. Change requests will appear in the compliance supervision queue. To access the compliance supervision queue, click on **Review** under **Administration** from the left navigation bar.



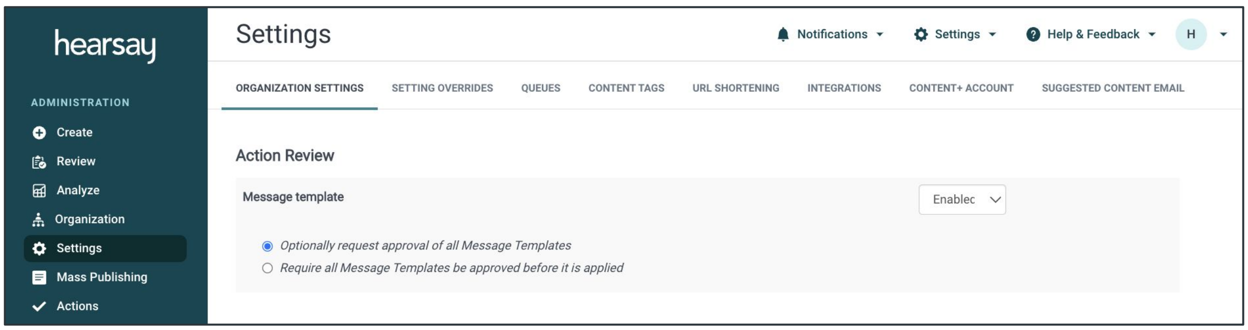
Each template change request will appear as a separate item in the compliance supervision queue. Separate language templates will also appear separately in the supervision queue. Change requests can be processed by the compliance reviewer within the Supervision detailed view.



Permissions and Roles:

- The marketing admin has permission to read/write message verbiage texts, including the option to add new language versions for multilingual organizations.
- The compliance admin has permissions to open, read, and write Action-related compliance requests and change Compliance Settings.

Compliance admins and full access admins are able to select the compliance workflow option appropriate for their organization by navigating to **Settings** > **Organization Settings** > **Review & Archive**.



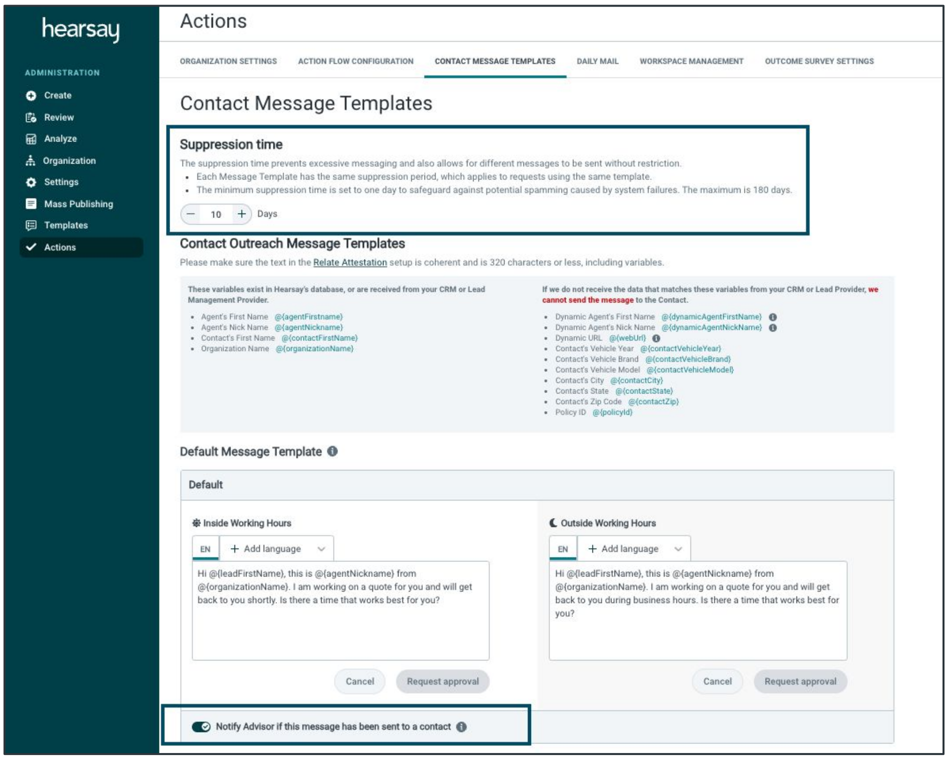
There are three organization-level compliance workflows supported for Action message verbiage changes in a set up similar to Social Content compliance management. Approval is turned on/off by the Enabled/Disabled flag:

1. When Approval is disabled, none of the verbiage changes would go to Compliance.
2. When Approval is enabled, selecting the “*Optionally request approval of all Message Templates*” radio button will give the Marketing Admin the choice of sending the Message Template to Compliance or saving the template and using it without a compliance check.
3. When Approval is enabled, selecting the “*Require all Message Templates be approved before it is applied*” radio button will enforce all new and modified message templates to be routed through a compliance check.

Suppression time

The Suppression time section of the Contact Message Templates allows you to configure the minimum number of days before any template can be reused for a contact.

In the Default Message Template section, configure the toggle to indicate whether the template triggers a user notification.



Advisor notifications

After the outreach message is successfully sent to a contact, the advisor receives a notification that the message was sent on their behalf. The advisor notification functionality can be turned on/off in a specific workflow. Advisor notifications are always sent within the defined "working hours." The in-app notification the advisor receives is:

Advisor notification
Message sent on your behalf
To {contactFirstName} {contactLastName} {contactPhoneNumber} the following message sent:{Message}

Multi-Lingual Support

Organizations can send multi-lingual action messages going to contacts.

The action flow insertion parameters are extended with “preferred language” so the organization can also define which language version of the outreach message shall be sent to a particular contact.

The language preference of a contact is stored in the contact service. Advisors can also view and edit the language preference there.

Organizations can define the verbiage of different language variants and send it to your Hearsay Implementation Manager. Your Hearsay Implementation Manager can set up the Multi Lingual variants in the action workflow configuration.

After the set-up is complete an organization can start using the Multi Lingual messages by sending the language preference information together with the contact information triggering the action.

In case an organization does not want to use language variants, the organization simply does not define the message alternatives in different languages and the action workflow will continue working using the English language messages.

Organization Settings

Organization Settings Page

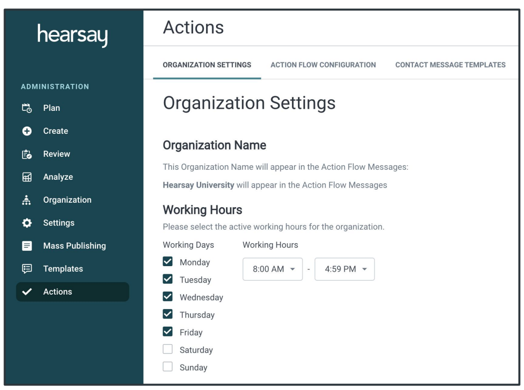
This page displays your organization settings and is where you can modify working hours and view do not disturb hours.

Working Hours

You can configure the following working hours settings for the Action Flow.

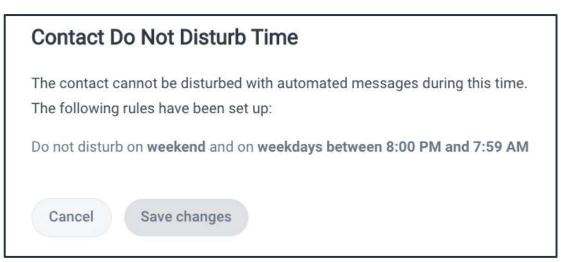
- Working days (select working days of the week)
- Working hours (define working hours applied to all selected workdays)

The default setup configuration 9am to 5pm on Monday, Tuesday, Wednesday, Thursday, Friday. Times outside of the specified working hours are considered non working hours. Working hours can be defined on an organization level. Once set, the same working hours are applied for all agents and contacts. Working hours are dynamically adjusted to a specific workspace based on the workspace timezone stored in the system.



Contact Do Not Disturb Time

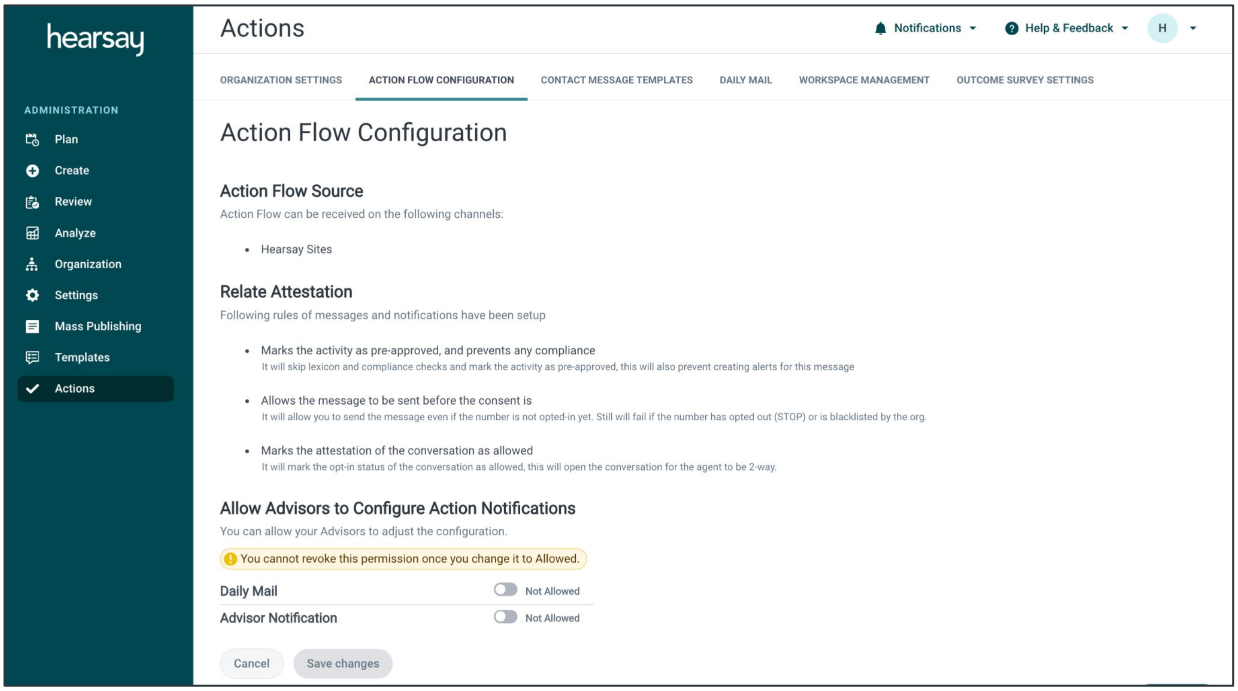
When a contact comes in during "do not disturb" time, the system will not send messages to the contact or the agent. The do not disturb hours are visible on this page in read-only mode. If you would like to change the do not disturb time period, please contact Hearsay Services to adjust your organization's do not disturb settings.



Action Flow Configuration

Action Flow Configuration Page

This page displays the source of the action flows, review Relate attestation rules, and agent notifications settings.

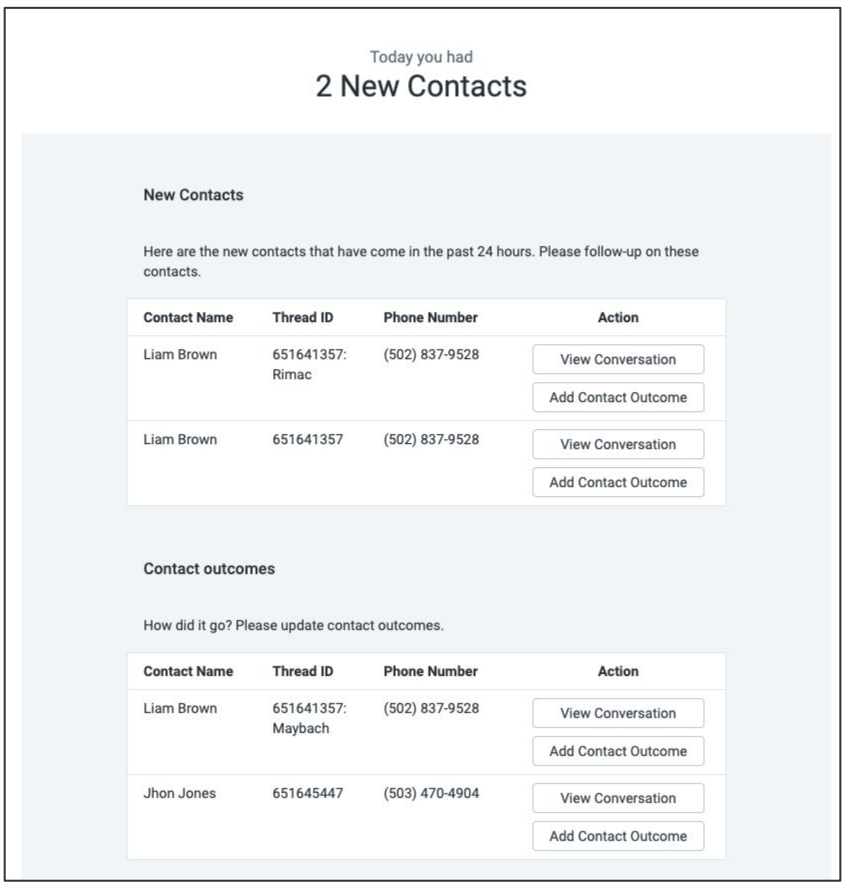


Daily Mail

Agents can receive daily summary emails that include two sections:

1. List of contacts assigned to the agent in the last 24 hours, excluding contacts where the agent survey is already completed. A maximum of 50 new contacts/day are included in the daily email. The daily mail summary also includes the corresponding Policy ID for each thread.
2. Earlier assigned contacts where the agent did not complete the survey so the flow is still active. A maximum of 50 earlier contacts/day are included in the daily email.

The email is sent by the system at 9 AM Pacific Time every day. This time is currently not configurable and independent from the actual time zone of the agent. You can turn the agent daily email on/off for your entire organization.

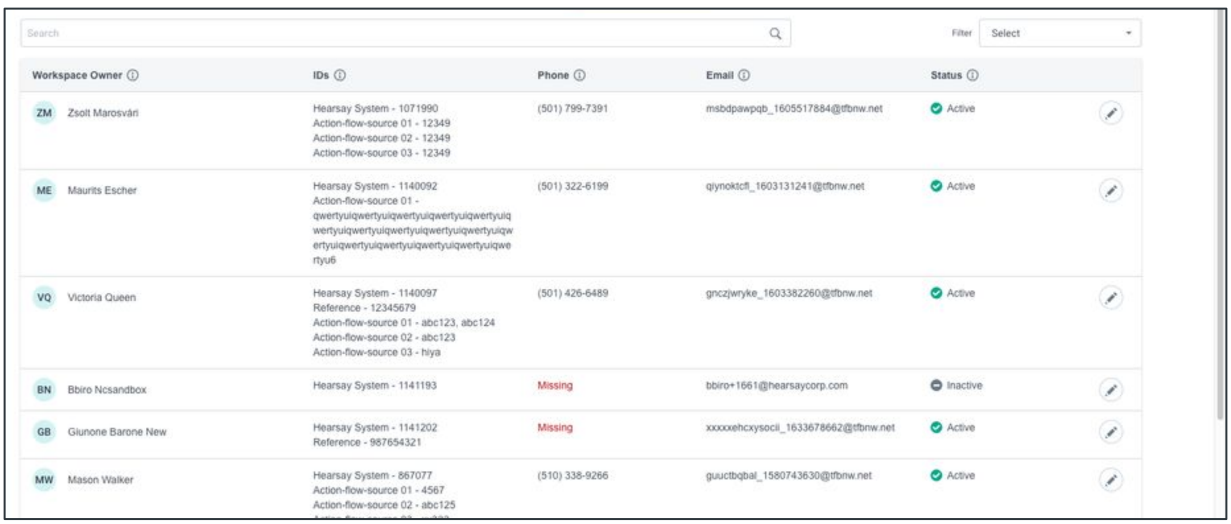


Workspace Management

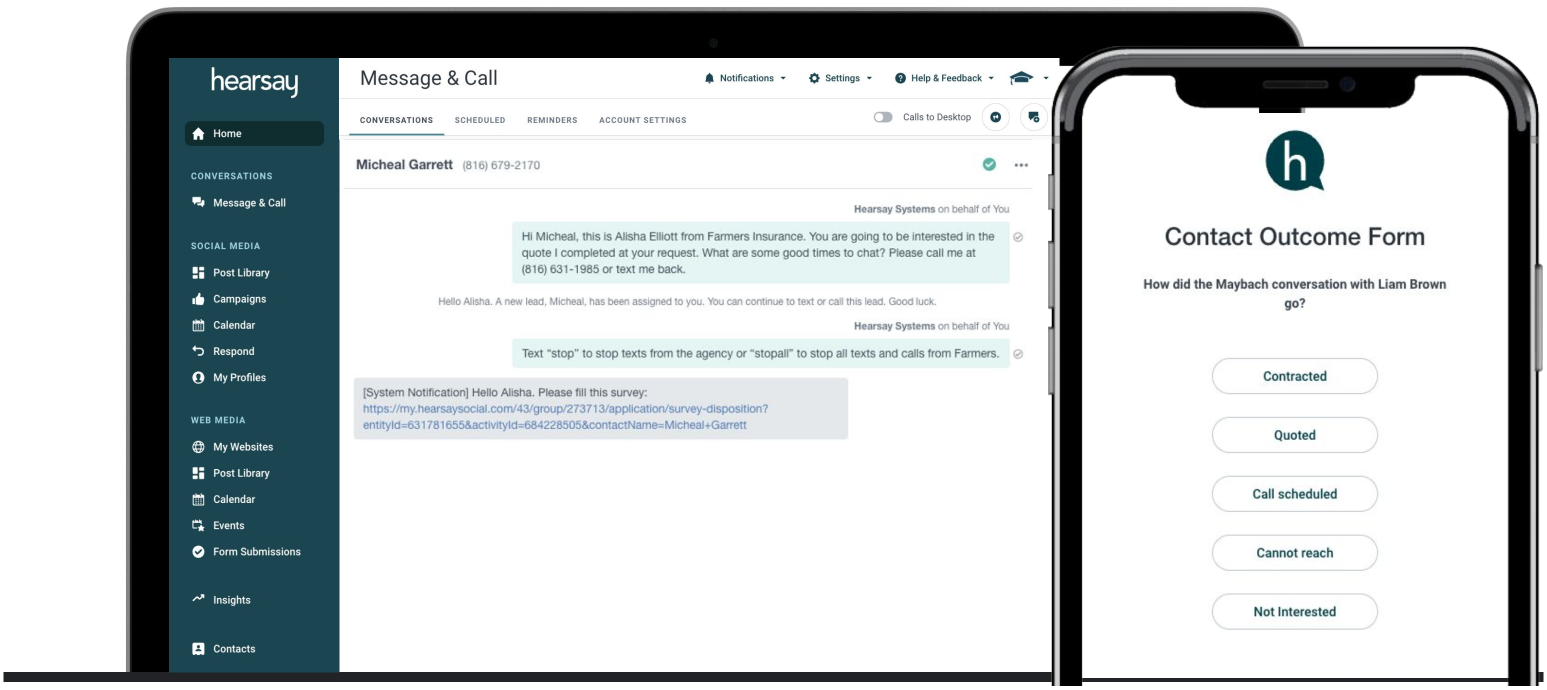
Workspace Management page

Admins can activate/deactivate Actions workspaces and provision selected workspace-specific parameters from this section. A complete list of capabilities admins have are listed below.

- Obtain a workspace owner's contact information from existing Hearsay profiles.
- Activate and deactivate Actions workspaces.
- Add, delete, and modify selected parameters of Action workspaces
- Add an action flow to a workspace
- Add external IDs to a workspace. A maximum of 50 external IDs can be added to a workspace.
- Filter for inactive, active, and deactivated workspaces
- Search for Action workspaces. Search is case-sensitive and works in text and numeric fields like name, email, phone number, reference ID, or external ID.



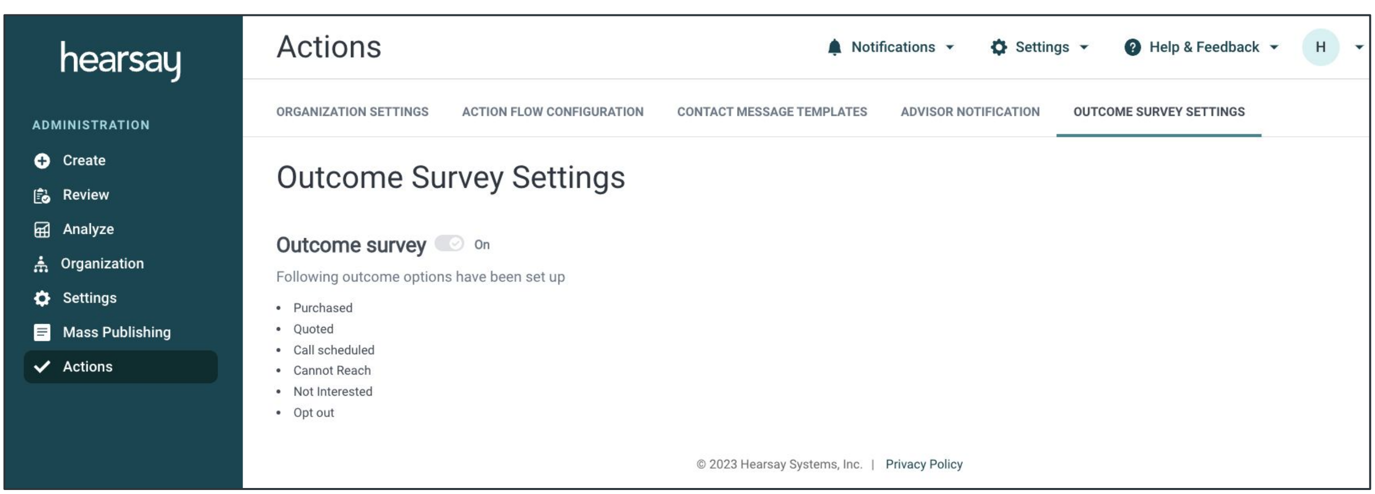
Outcome Survey



The outcome survey is available for the agent to complete for every contact the agent is notified about. When an organization leverages the outcome survey, agents can access it through the daily email and a survey link can be added as a parameter to every agent notification message as well.

Outcome Survey Settings page

From this page admins can view the survey answer options. To configure these answer options for your organization, please contact Hearsay Support.



Program Dashboard & Reporting

Admins can utilize the Actions Outcome Value Measures Dashboard to view key business metrics for your Actions program, providing insights into overall program performance. The dashboard gives a summary of your Actions program, visualizing the key business measures on the overall program performance, on the contact assignments, on the success of the contact communication and on the outcome of the actions.

This dashboard can be accessed within the Outcome Value Measures section of your admin dashboards, by navigating to **Analyze** > **Dashboards** > **Outcome Value Measure Dashboards** > **Actions**.

Key business metrics highlighted on the dashboard:

- Number of contacts assigned and orchestrated
- % of contacts with inbound/outbound voice calls and text messages
- Number of inbound/outbound calls
- Number of contacts responding to text outreach
- Median first response times by agents and by contacts
- Number and % of outcome survey completed
- Outcome ratio by response categories
- Contact to client conversion numbers and ratio

Detailed documentation on this dashboard can be found here (password: HearsayDocs).

Breakdown by Action Workspaces Report

The Breakdown by Action Workspaces report helps admins understand and compare advisor/agent performance, identify bottlenecks, and spot outliers on workspace level.

Actions Template Messages

The Actions Template Messages report provides an overview of all message outreaches to Actions program contacts. It displays the usage and performance of template messages.

These reports are accessible from the Reporting landing page, under Analyze/Reports. Detailed documentation on these reports can be found here (password: HearsayDocs).

Main Capabilities

- **Contacts Insertion**: Contacts can be inserted via
  - The API gateway as specified in the API documentation
  - CRM synchronisation
  - Hearsay Sites contact form
- **Working Hours**: Actions can adopt its behavior so it sends messages during an organization's business hours
- **Contact Text Notifications**: Contacts receive text notifications that set the stage for the upcoming agent interaction
- **Agent Text Notifications**: Agents receive text notifications of active contact assignments and conversations
- **Agent Daily Email**: Agents receive daily summary email of new contacts and open ongoing action flow contact engagements
- **Outcome Survey**: Agents receive outcome survey to document the result of contact interaction
- **Automated Update of Contact Type:** When contacts are inserted into Actions, the Hearsay contact type is automatically updated
- **Admin Dashboard**: Program-level performance dashboard
- **Drip Messages**: Send multiple automated outreach messages using a different message template each time.

CONTACT INSERTION

The contact record an agent receives must have the following information:

- Contact information: Contact first name, last name, phone number, email, contact ID, timezone, language preference, communication preference
- Agent information: Agent first name, last name, phone number, email, Agent ID, and timezone
- Source of the contact: How agent obtained the contact (e.g., internet lead systems like Everquote or Quote Wizard)

WORKING HOURS

Organizations can configure working hours for the action flow:

- Default setup configuration 9am to 5pm Monday - Friday
- Times outside of the specified working hours are considered non-working hours
- Working hours can be defined at the organization level. The same working hours are applied for all agents and contacts.
- Working hours are dynamically adjusted to a specific Workspace based on the workspace timezone stored in the system