Hearsay Social User Guide

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Last Updated: July 2025

Contents

Hearsay Social is the leading social selling solution for the financial services and insurance industries, helping financial professionals harness the power of social media to grow their business. It automates top-of-funnel marketing activity, identifies key selling opportunities, and drives 1:1 advisor/client engagements. Hearsay Social enables the advisor to focus on the most important part of their job—building and servicing relationships—without heavily investing time in social media management or worrying about compliance.

This guide provides step-by-step instructions for how to utilize Hearsay Social features and a deeper understanding of how social can increase client engagement and impact your return on investment.

Product Overview

Hearsay Social is built on top of the Hearsay client engagement platform, the pre-eminent omni-channel digital engagement center for the financial services professional. It binds the most effective marketing, acquisition, and servicing channels into one ecosystem, enabling agents and advisors to focus on the most important part of their job—building client relationships—without the friction of switching between systems or the fear of compliance backlash. Our social solution helps advisors use technology to strengthen human relationships, not replace them, and is used by more than 200,000 users around the globe.

HEARSAY SOCIAL FEATURES

With Hearsay Social, you can:

- Publish pre-approved content
- Share automated content
- Create original content
- Modify content
- Monitor social signals
- Respond to messages
- Post comments
- Organize your contacts
- Create compliant social profiles
- Follow Recommended Actions for guidance

Technology should strengthen human relationships, not replace them.

GET SUPPORT

NORTH AMERICA
888.399.2280

UNITED KINGDOM
+44.800.808.5124

EMAIL
support@hearsaysystems.com

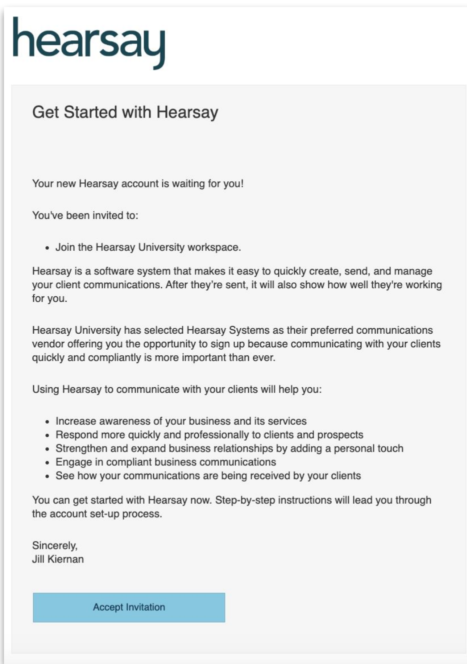
HELP CENTER
https://success.hearsaysocial.com/hc/en-us

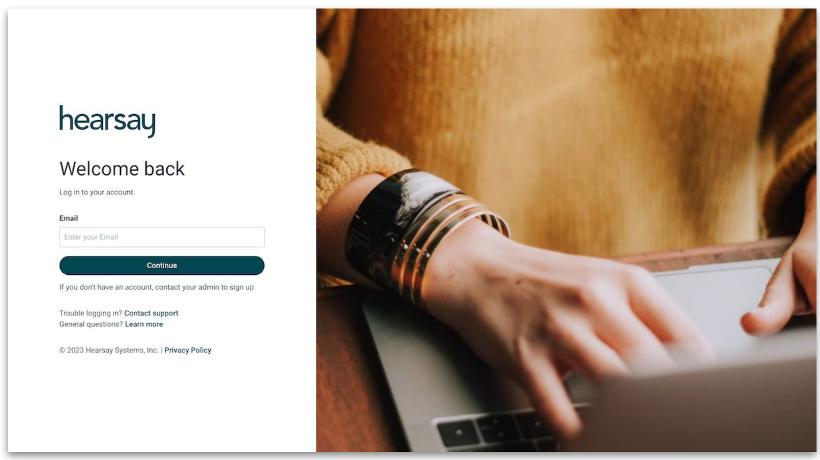
Getting Started

The first thing you'll need to do is accept your invitation from Hearsay Systems to activate your Hearsay Social workspace.

First, check your email for the invitation to Hearsay Social. Then select Accept Invitation. Alternatively, click on the signup link in the email you received.

Next, follow your organization's login method which could be via Facebook, LinkedIn, or your company login through Single-Sign On.





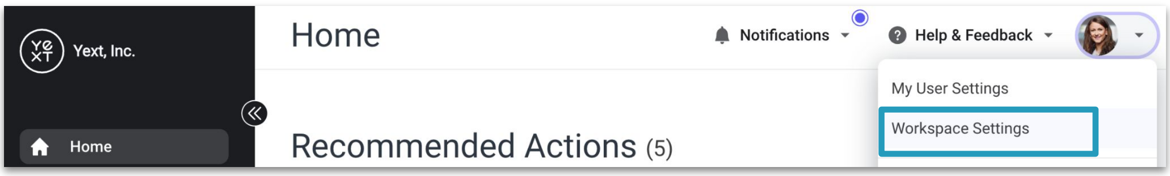
Note: Remember to always log in using the same method and platform you used to sign up for Hearsay Social. If you are unsure of which login method to use, contact your social program administrator.

Connect Accounts

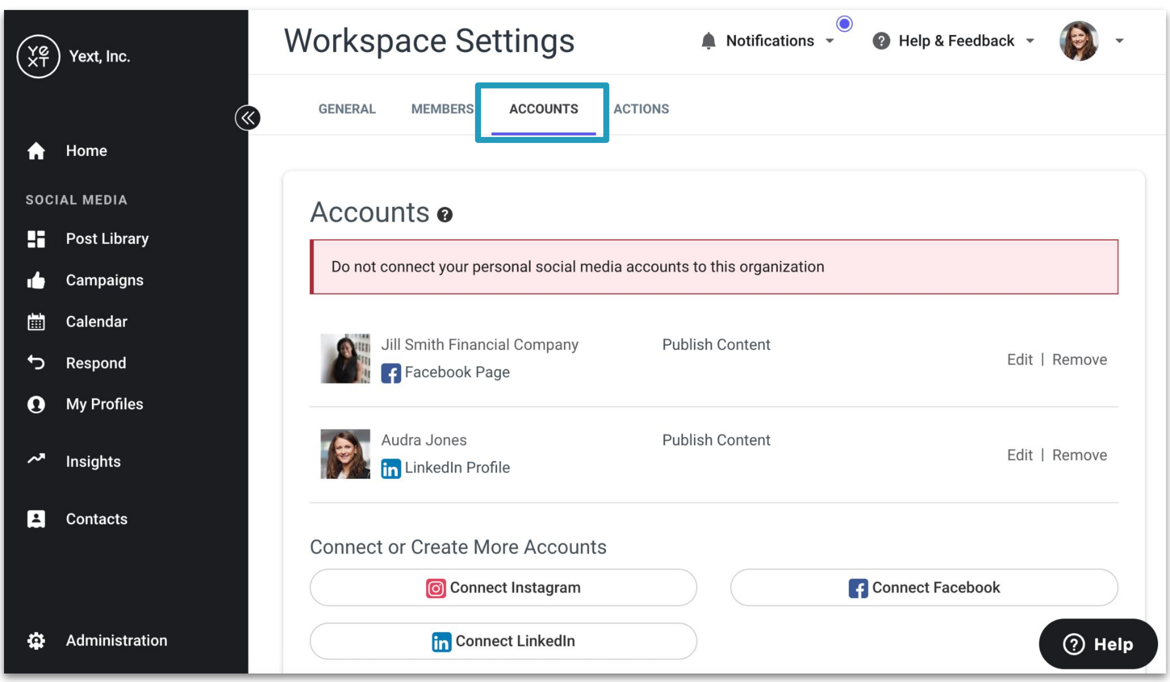
A key part of your social media experience and engagement is managing the social accounts you have linked to Hearsay Social.

To connect your social media accounts to Hearsay:

1. From the User dropdown, select **Workspace Settings**.



2. Then select **Accounts**. Any connected accounts will be listed on this page along with the account type.



Profile Accounts

- Profile accounts are for individual use and must be held under an individual name.
- When connecting LinkedIn or Twitter, you will be prompted to enter in your profile login credentials.
- After successfully logging in, you will be prompted to first choose your profile and then click Finish to complete the process.

Business Page Accounts

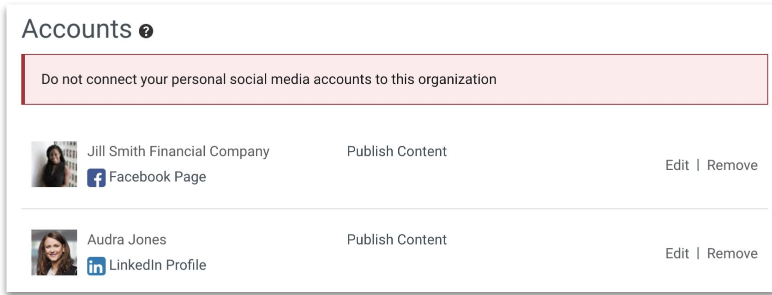
Business Page accounts are assets owned by a profile.

- When connecting Facebook or Instagram, only business pages can be connected to Hearsay Social. Personal profiles cannot be connected to Hearsay Social.
- To connect, you will be prompted to first enter your personal login credentials.
- Once logged in, you will be prompted to connect a business page your profile either owns or administers.
- Check the box for the correct business page and click Finish.
- Once your business page is connected, Hearsay drops the connection to your profile entirely and only monitors your business page.
- If you are alerted “No Accounts to Connect,” this means your profile does not own or administer a business page and you will need to reach out to your organization’s social media team for assistance.
- LinkedIn allows LinkedIn company pages to be connected to Hearsay. The process is the same as for connecting a LinkedIn personal profile.

Manage Social Accounts

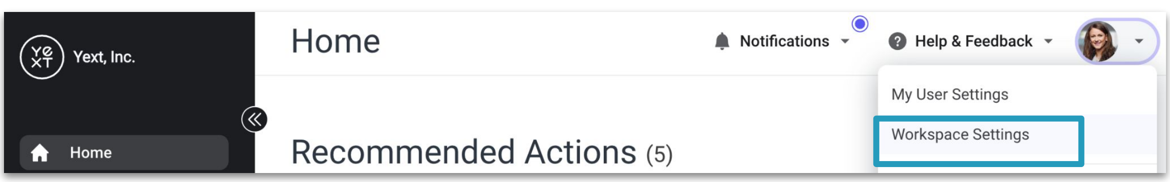
To manage social accounts:

1. Click on the **profile link** to view the social media account connected to Hearsay Social.
2. Click on **Edit** to manage the account or **Remove** to delete the account.

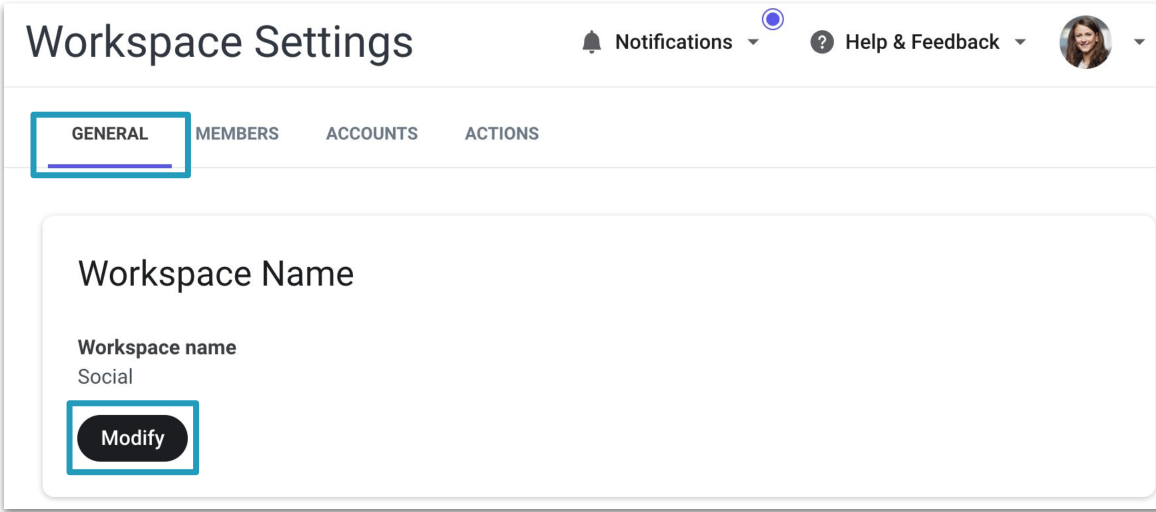


Workspace Settings

A Workspace is an instance of Hearsay. You can invite multiple users to a Workspace such as assistants or team members to help you manage your Hearsay Social account. To update your Workspace, from the User dropdown, select **Workspace Settings.**

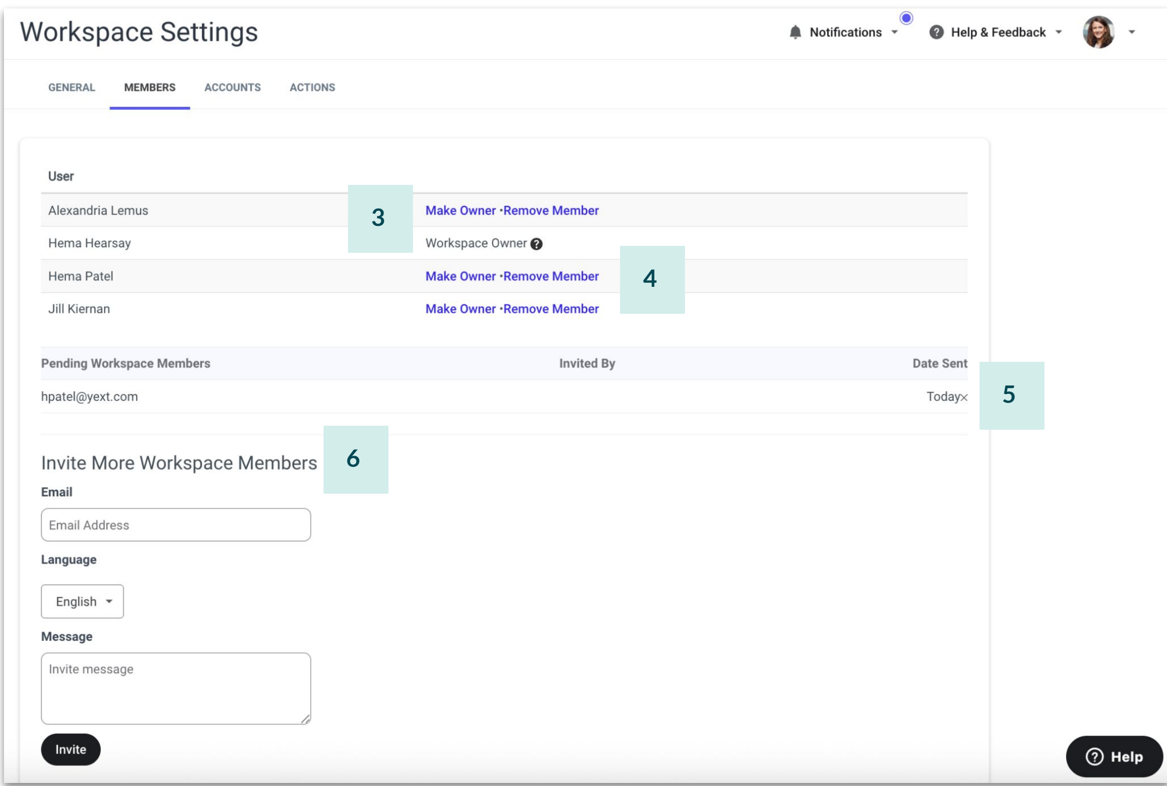


1. To change the Workspace name associated with your Hearsay Social account, select **General > Modify.** Type your new name, and click **Submit**.



2. Type your new name, and click **Save.**.

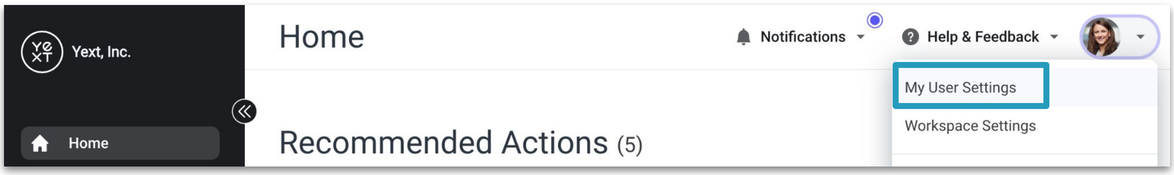
3. To change the Workspace Owner, select the **Members tab.** Then click on **Make Owner** to the right of the user. You can only designate one Workspace owner.
4. If you are the Workspace owner, you can click on **Remove Member** to remove a user from your Workspace.
5. If you have sent an invitation to join your Workspace, you will see those members under **Pending Workspace Members.** To cancel or expire the invitation, click on the **"x"** next to the date the invitation was sent.
6. To invite staff members to your Workspace, enter the staff member's email address and click **Invite**.



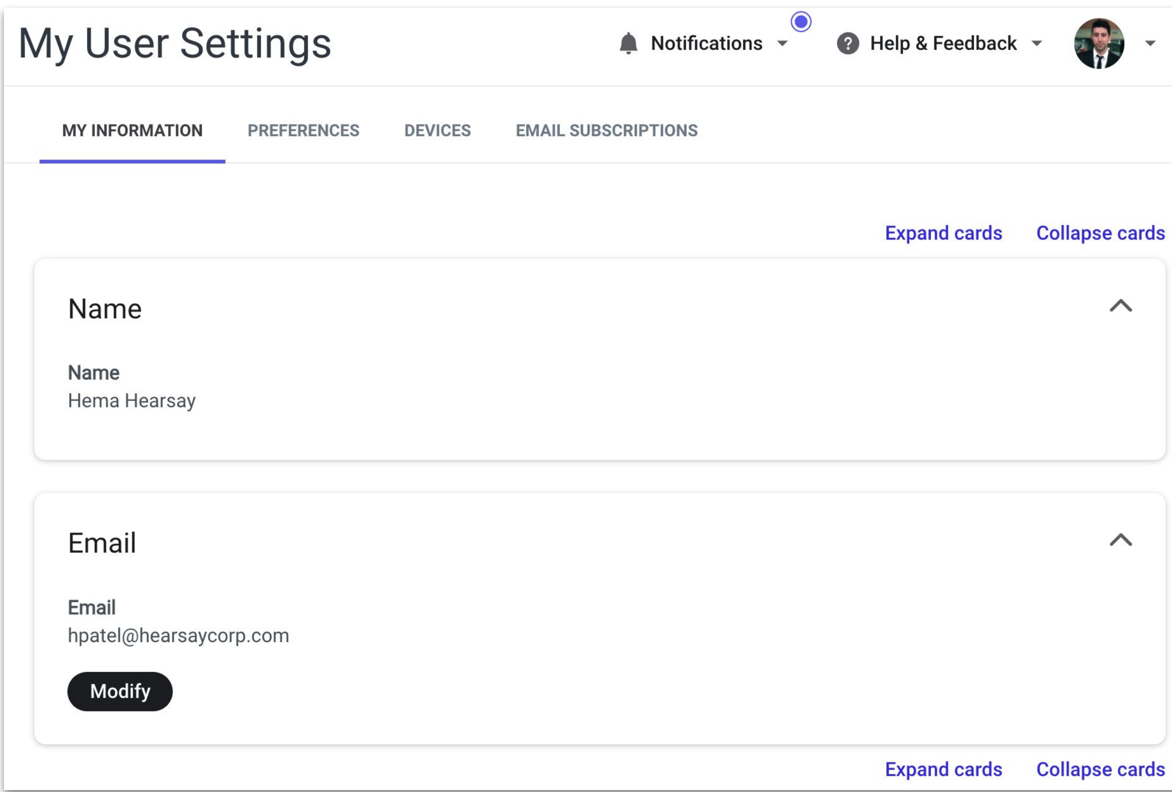
Note: By default, you are the owner of your Workspace.

My User Settings

You can adjust your Hearsay Social account to make the application work best for you by changing your User Settings. To update user settings, select My **User Settings** from the User dropdown.

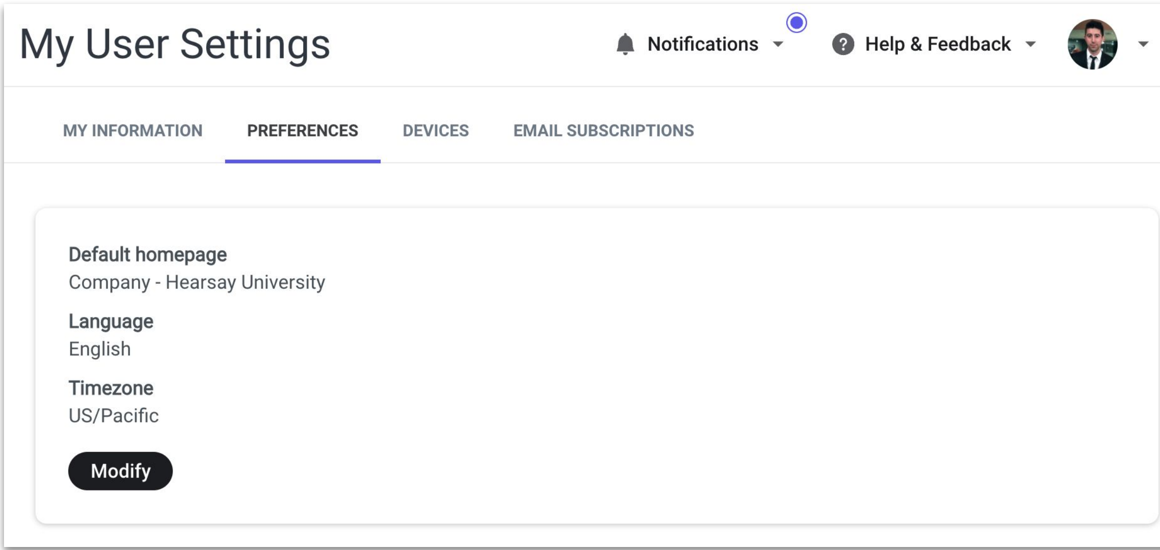


1. From the **My Information** tab, you can view your name for the workspace and **modify** your email address. Hearsay Social notifications will be sent to this email address.

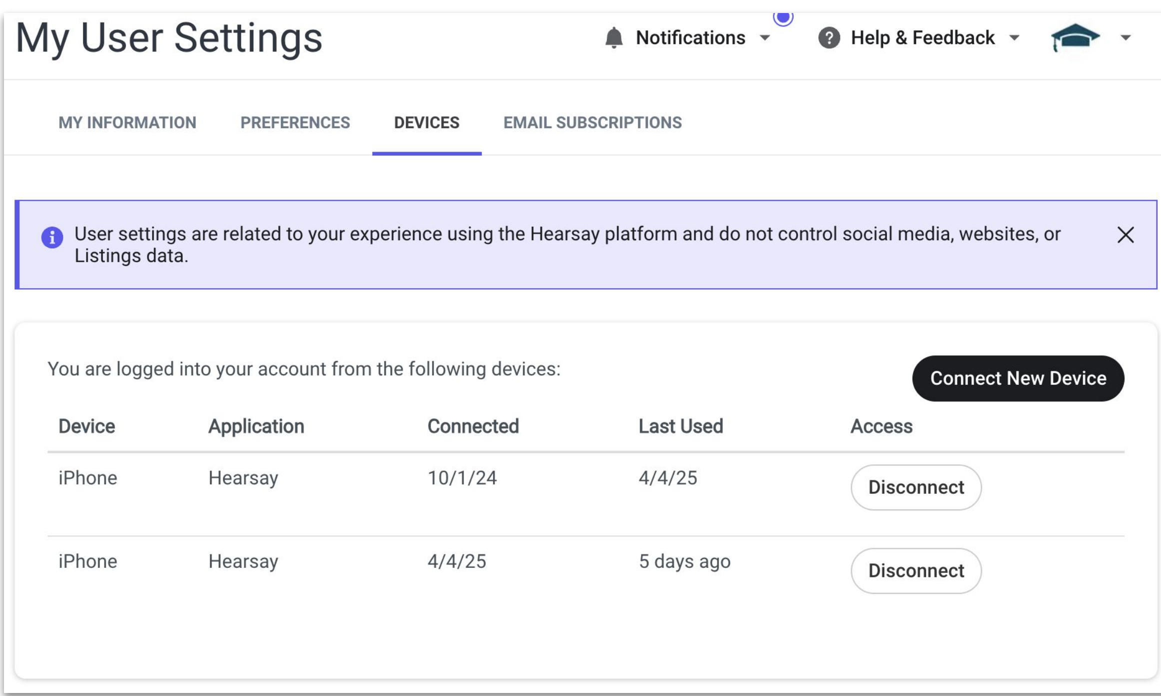


Note: If you sign on to Hearsay using the LinkedIn or Facebook login method, your email in Hearsay will update automatically to the email you use to login to your social network. We recommend updating your email in Hearsay to your corporate email address so you can receive Hearsay notifications to that email.

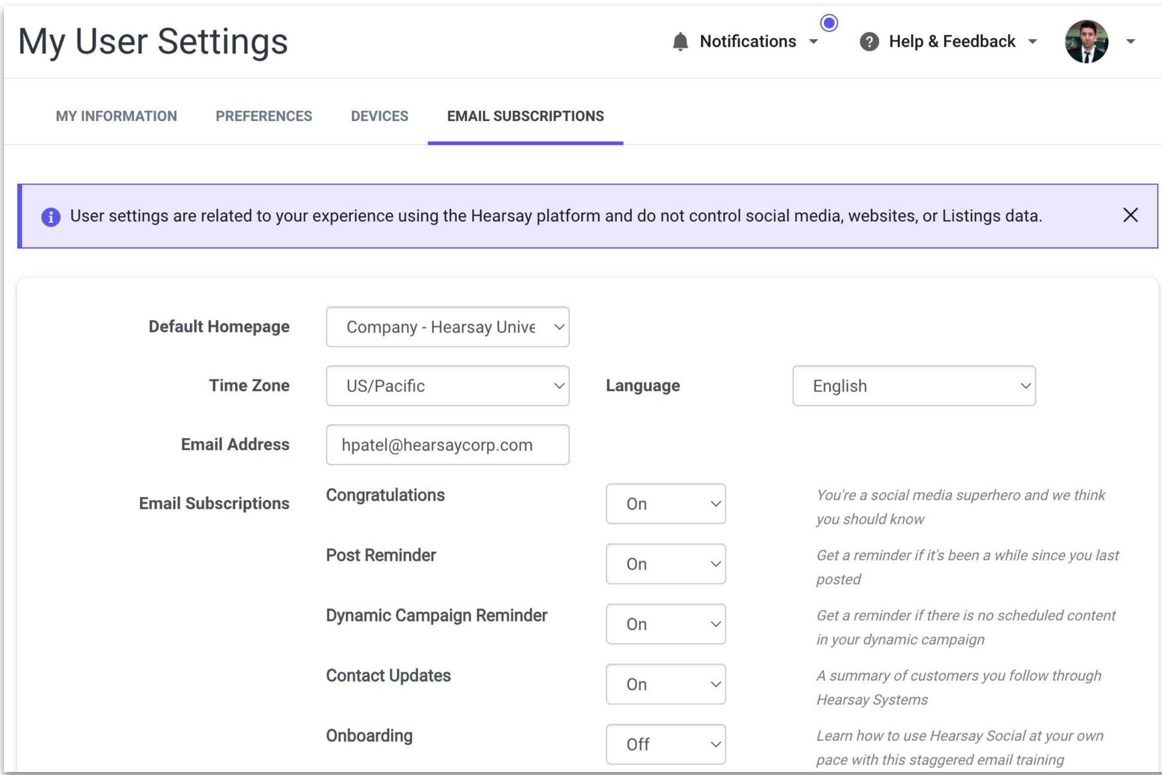
2. From the **Preferences** tab, you can configure your default homepage, preferred language, and time zone (This is important to make sure your scheduled posts go out at the right time).



3. From the **Devices** tab, you can connect or disconnect your mobile device to/from Hearsay.



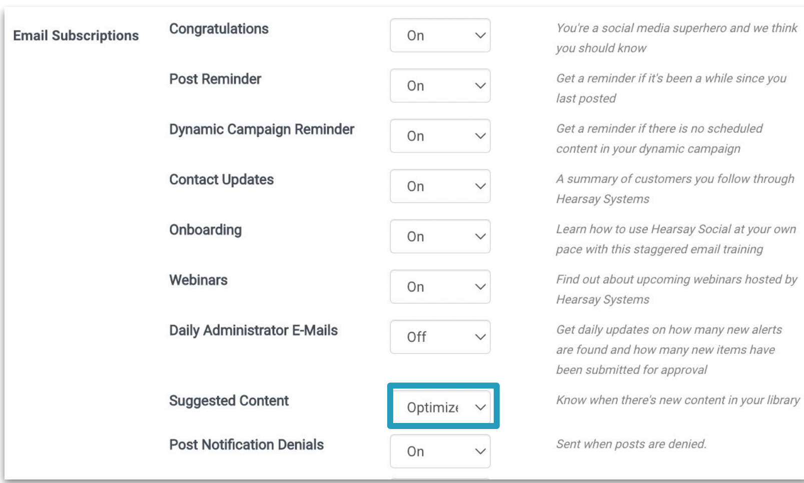
4. From the **Email Subscriptions** tab, you can opt-in or opt-out of email notifications by selecting "ON" or "OFF" from the Email Subscriptions dropdown.

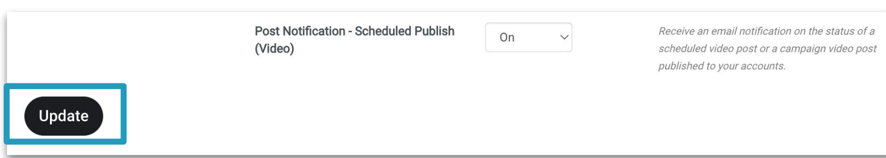


Suggested Content Email

The Suggested Content email that users receive has a section dedicated to content from the Content Library that is personalized for each specific workspace.

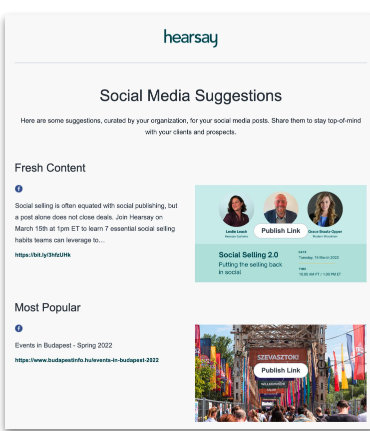
To enable this feature, in the My **User Settings** > **Email Subscriptions** section, select **Optimize** from the Suggested Content dropdown.

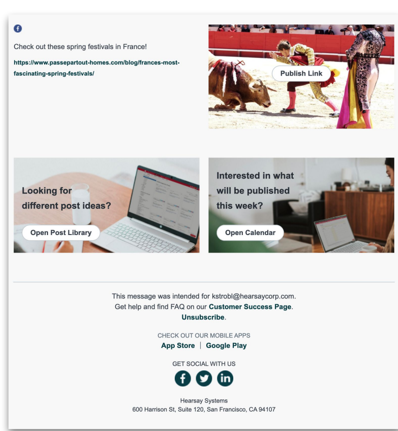




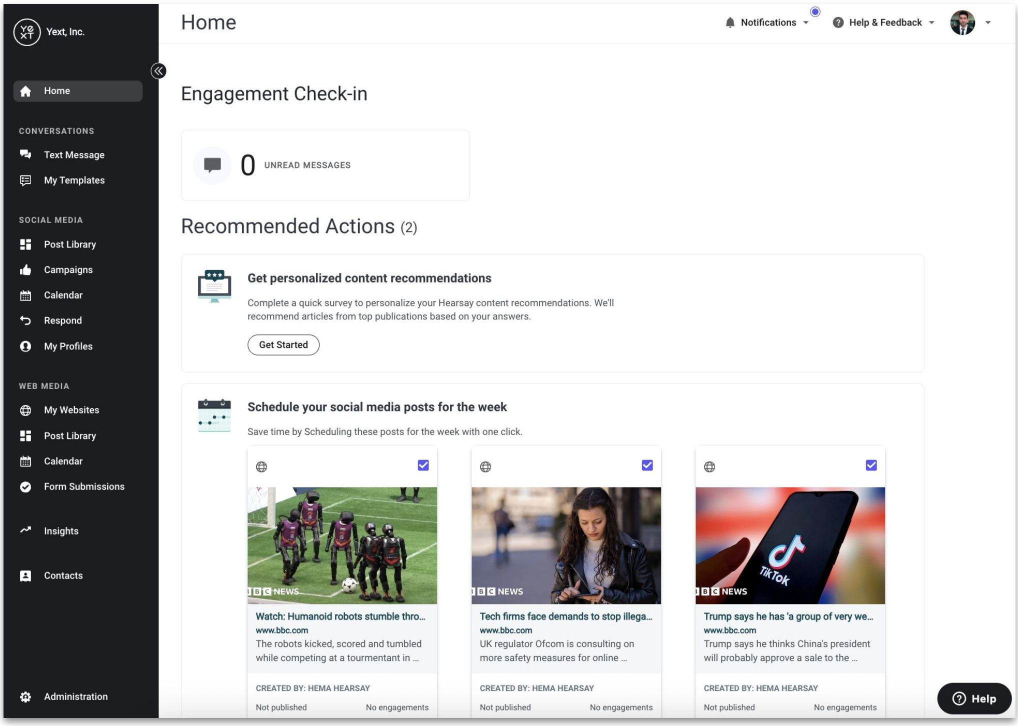
Remember to click on the Update button at the bottom left of the page to save changes.

Individual pieces of content have visual indicators of the social channels they can be published to, modification rule-related tags, and a publish link. There are also direct navigation links to the Post Library and user's Calendar pages in Hearsay Social. Users are able to unsubscribe from this email via a link included in the email.





Home Page



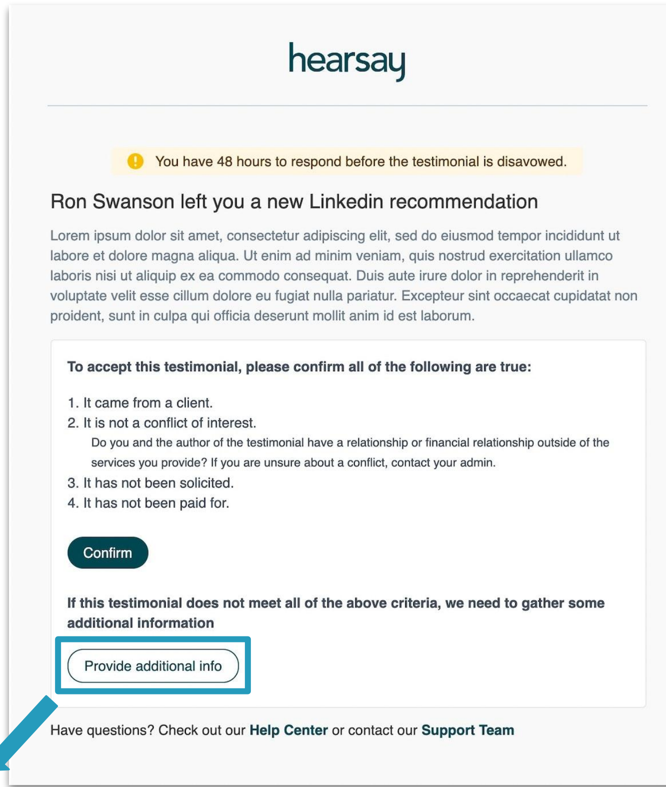
The Home Page displays your Engagement Check-In and Recommended Actions.

Engagement Check-In

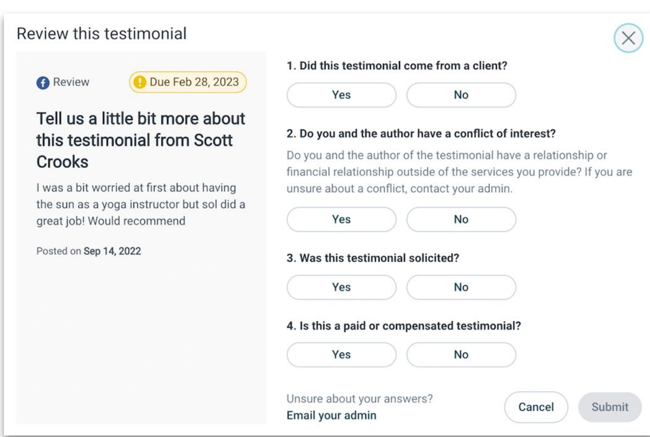
The Unreviewed Testimonials tile only appears for users in an SEC-regulated hierarchy. For information about SEC-compliant testimonials, see [SEC's Modern Marketing Rule Testimonial Support Now Available.]() Hover over the SEC tooltip for more information. If a user clicks Unreviewed Testimonials, they are taken to a page that lists all of their unreviewed testimonials, ordered by soonest to expire.

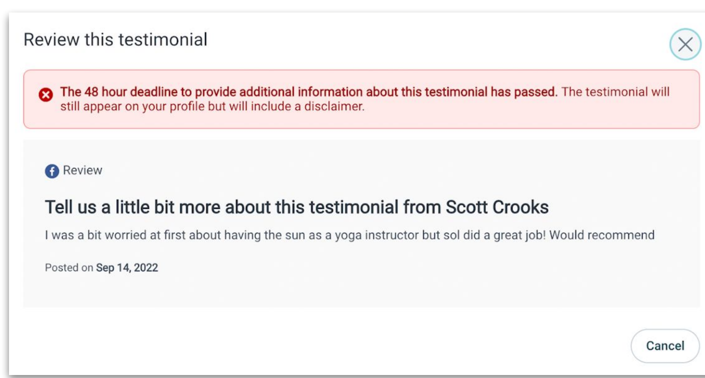
User Workflow for Testimonials

When someone leaves a testimonial, the user receives an email asking them to identify the individual who wrote it, and gives the timeframe for them to take action. Clicking **Confirm,** published the testimonial.



If they select Provide additional info, they are taken to this screen to provide the information.

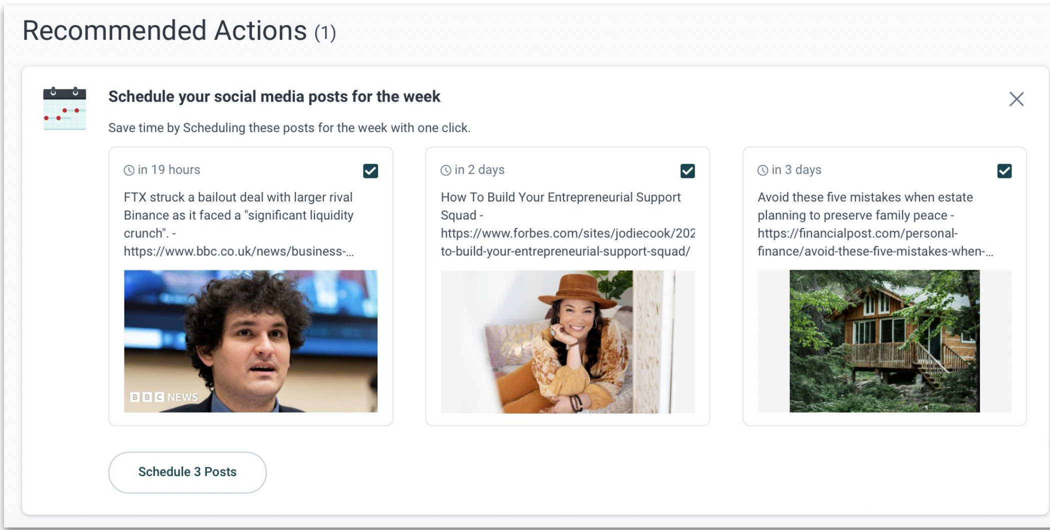




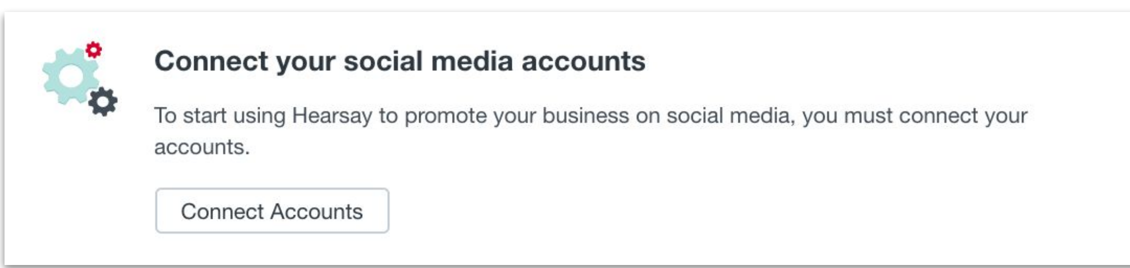
If the user doesn't provide the information on time, they are informed that the testimonial is disavowed.

Recommended Actions

This Actions List consists of actions for setting up your account as well as recommended actions to take based on community engagement. This might include following up on a post comment, subscribing to a campaign, or making a necessary profile update to align with compliance policy.

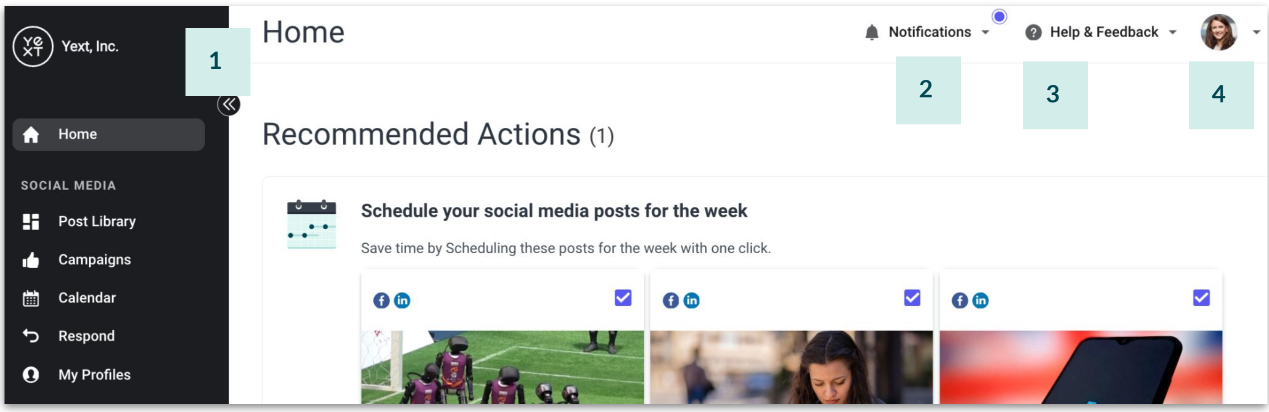


Onboarding action cards are triggered for new workspaces. The "Connect Your Social Media Accounts" action card will encourage you to connect your Facebook, LinkedIn, Twitter or Instagram account to Hearsay and guides you via an onboarding wizard in order to complete the process.



Navigating Hearsay Social

After accepting your invitation from Hearsay Systems to activate your Hearsay Social Workspace, you will have access to the Social tab. Below is a description of the features available on the Hearsay Social Home page.

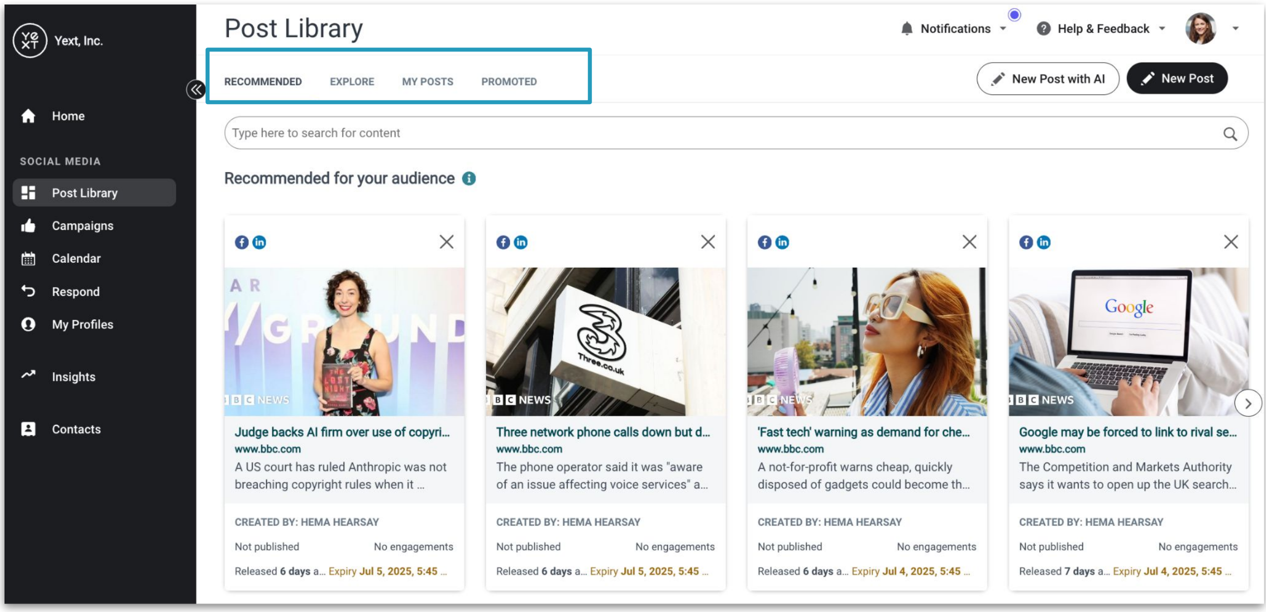


1. **Navigation Bar:** Select tabs to navigate through the product pages and features.
2. **Notifications:** Alerts the user of important information from their organization. For example, when a profile status changes from Profile Pending Review to Profile Approved, you can view the notification here.
3. **Help & Feedback:** Directs the user to the Hearsay Help Center and provides the ability to leave feedback.
4. **User dropdown:**
    - **My User Settings:** Update your workspace email, time zone, language, email subscriptions, and connect/disconnect devices.
    - **Workspace Settings:** View and add workspace members, connect and manage social media accounts.
    - **Workspace & Organization Toggle:** Allows the user to toggle between other workspaces they are connected to within their parent organization. Users can also switch between different accounts if they are connected to a workspace outside of their parent organization.

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

Post Library

The **Post Library** is where you will go to access all pre-approved content from your organization that's available for publishing. From here you can also create original content.



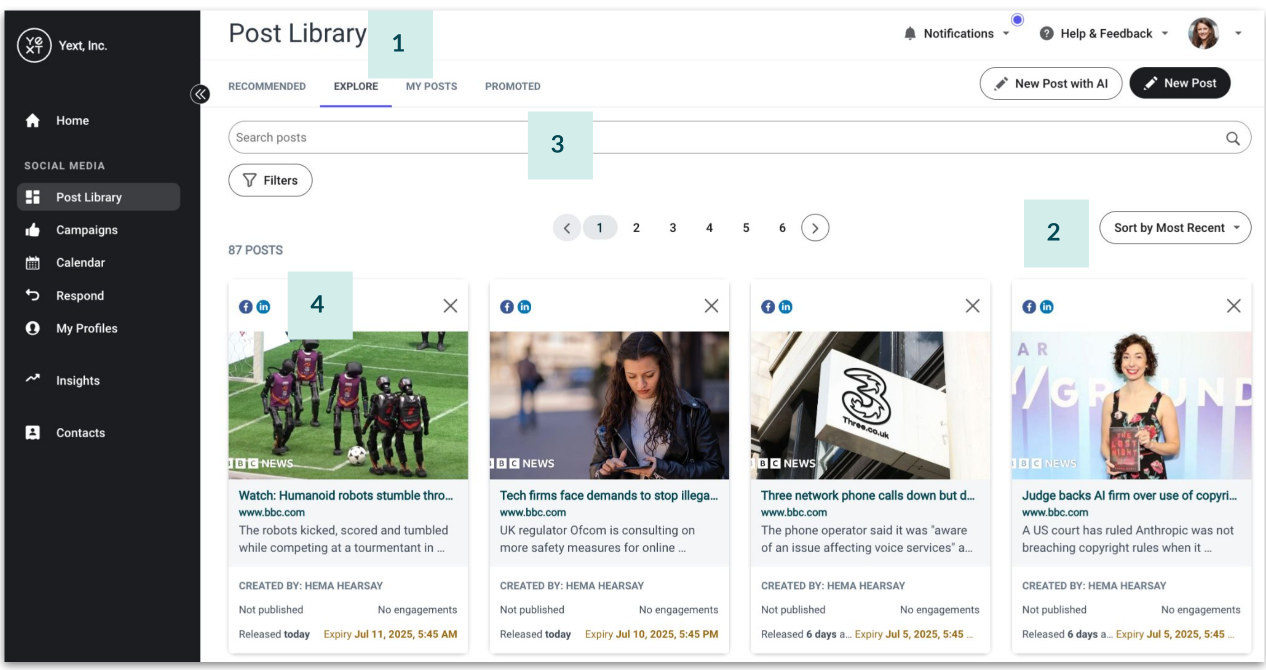
You can access the Post Library by clicking on Post Library under Social Media. Here, you will find a selection of suggested posts and can search for specific content using keywords or topics.

Post Library Definitions

- **Recommended:** AI-recommended content based on Highlights at your organization, Recommended for your audience, Based on your interests, Most recent, Most engaging, and Popular with your peers.
- **Explore:** Post library of pre-approved content created by your organization, available for instant publishing or coming soon.
- **My Posts:** This tab shows content that you have scheduled to publish at a later date. You will also see posts you already published on social media accounts, content awaiting approval by your organization, and posts deemed outside of compliance by your company. You will notice a campaign label on posts that are scheduled to be published or already published by a campaign so you can make a distinction between the posts you published from the Explore tab vs. a campaign.
- **Promoted:** Content that can be promoted on Facebook.

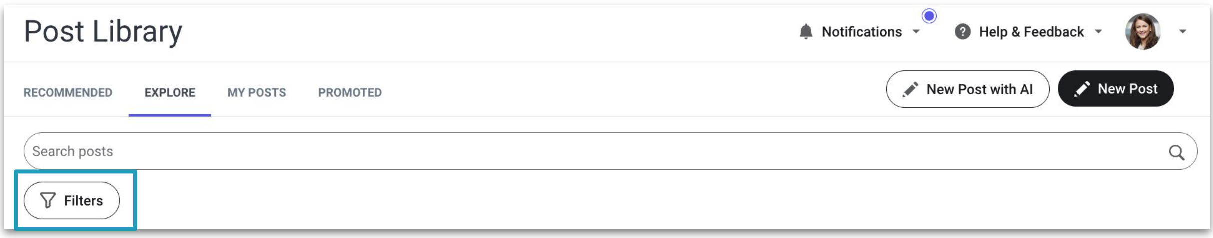
Explore

1. Clicking on the **Explore** tab within the Post Library will present you with pre-approved content created and curated by your organization's social media and compliance teams. This content is available for instant publishing and scheduling and can be sorted and filtered.
2. You can sort pre-approved content by:
   a. **Recent:** The newest content added to your library
   b. **Engaging:** Content that is receiving the most likes, comments, and shares on social media
   c. **Popular:** Content that the majority of users within your organization is publishing
3. Type a keyword or topic in the **Search box** to find related content.
4. The social icons in the top left of each piece of content indicate the social network/s the post can be published to.



Filters

Clicking the **Filters** button on the **Explore** tab allows users to sort by channel, content type, modification rules, content creator, and tags in a new pop-up window.



Channel: Filter content by networks that your organization allows (i.e. Facebook, Instagram, Third Party, Twitter, LinkedIn, Hearsay Site)

Content Type:

Link: Content that contains a web address/third party article

Message: Content that contains written text

Image: Content that contains an image

Video: Content that contains a video

GIF: Content that contains a GIF

Creator: Filter content by who has created the post

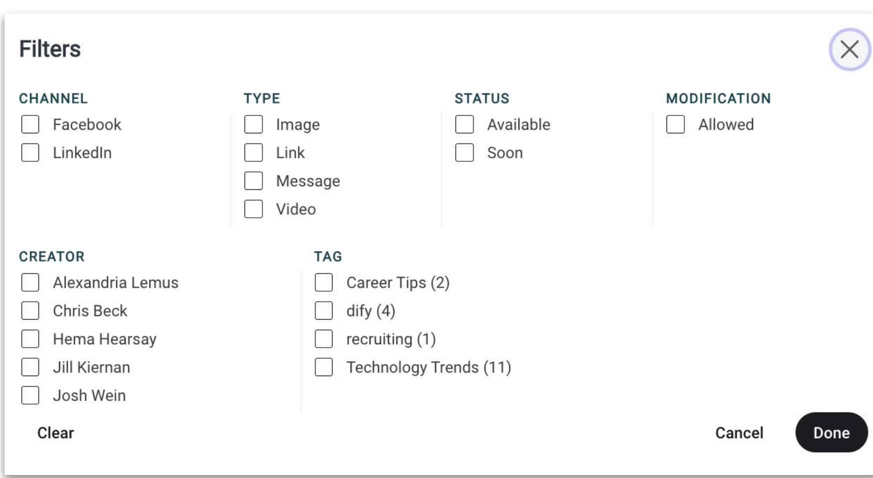
Modification:

Optional: Content that does not have to be modified in order to schedule or post

Prohibited: Content that cannot be modified

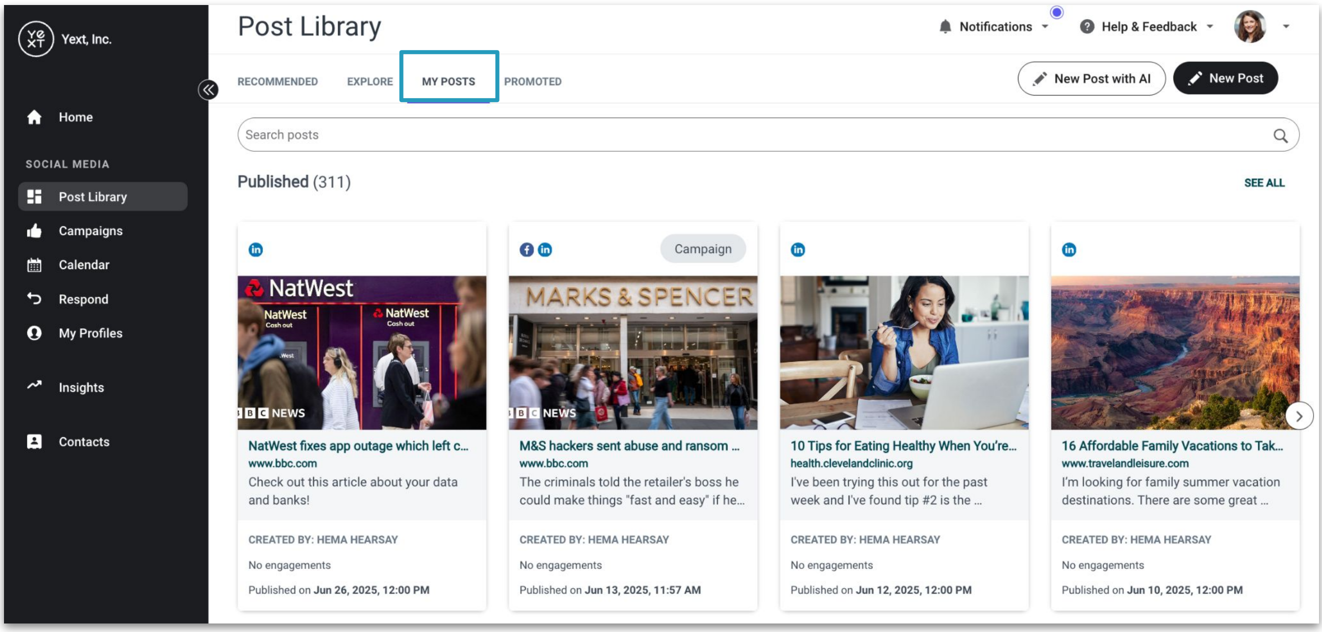
Required: Content that must be modified in order to schedule or post

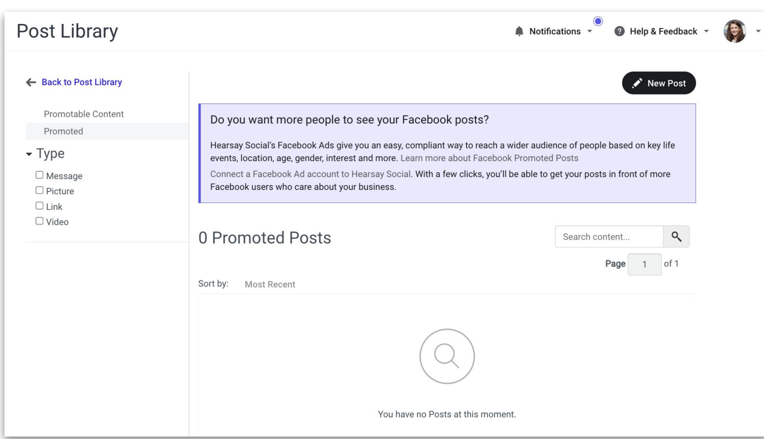
Tags: Categories that enable the user to filter content for specific topics of discussion



My Posts

The **My Posts** tab sorts posts by Scheduled, Published, Pending, and Denied. Within the Scheduled and Published categories, there is a label “Campaign” on posts that are scheduled to be published or already published by a campaign.

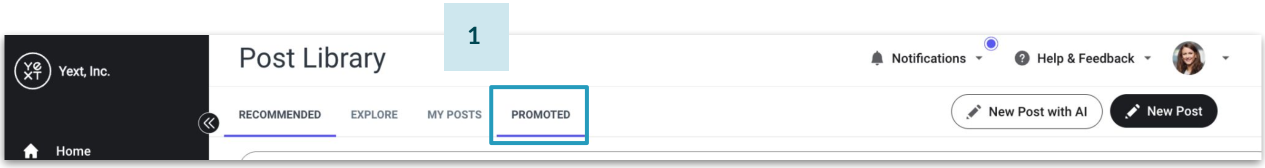




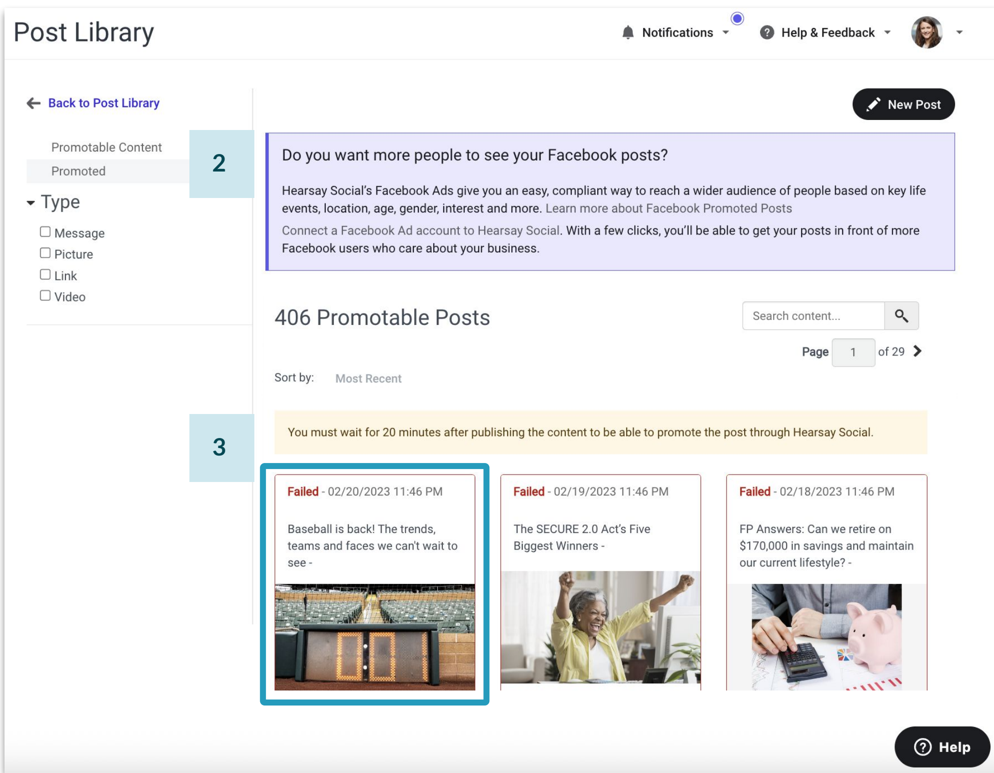
The Promoted Tab will show Facebook Ads, which are promotional posts that can be shared on Facebook. If this feature is enabled for your organization, you can promote a post that you have published to Facebook using the Promoted Post feature.

Promoting a Post

1. Select the **Promoted** tab from the Post Library.

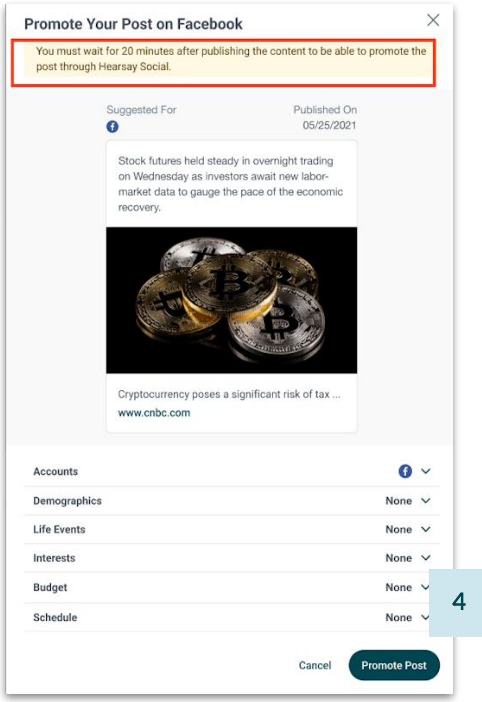


2. Select **Promotable Content** from the left-hand side.
3. Select the **Published Post** you would like to promote. Note: It must be a post that you have already published to Facebook at least 20 minutes prior.



Note: Promoting a post on Facebook displays that post to all the Facebook users you targeted, whether they are currently in your network (connections) or not.

4. Select the Promote Post button in the bottom right corner of the Published Post.



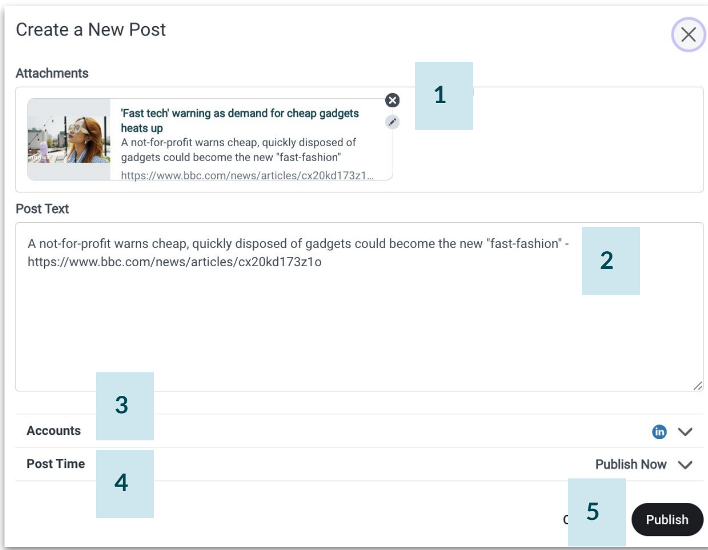
- **Accounts:** Select which Facebook Ad account you would like to use to promote the post.
- **Demographics:**
  - **Location:** Use the location field to geographically target your promotion
  - **Age:** Only users within your age range will see your promoted post
  - **Gender:** Control which gender will see your promoted post
  - **Connections:**
    - **People Who Like Your Pages:** Promoted Post is only shown to those who have liked your Facebook Business Page
    - **Friends of People Who Like Your Page:** Promoted Post is only shown to the friends of people who have liked your Facebook Business Page
    - **Exclude People Who Like Your Page:** Promoted Post will only be shown to those who have not yet liked your Facebook Business page
- **Life Event:** Target Facebook users based on specific life events such as a wedding or buying a home
- **Interest:** Target certain interest groups or areas of interest with your promoted post, such as only real estate or insurance
- **Budget:** Set the budget you would like to allocate to your promoted post
- **Schedule:** Set a start date to begin promoting your post and an end date for the post promotion to expire

Publishing Content

You can choose to publish content directly from the pre-approved content list or create your own custom content.

Publishing Pre-Approved Content

Once you have selected a piece of content to post, click on the desired post. This will open the publisher window.

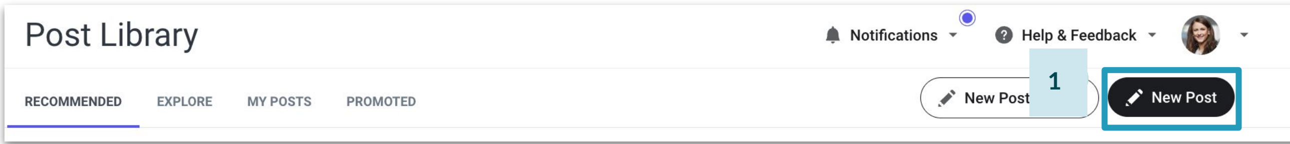


1. Depending on your organization's social media policy, you will be able to edit the post message (caption) that coincides with the content. If your organization has disabled editing of the post message, you will not be able to edit the caption.
2. If your organization allows for edits to content, you can click on the pencil icon to change the thumbnail image or content.
3. Under Accounts, select the account to which you'd like to post; this may be determined by the social networks your organization has contracted.
4. A key functionality in publishing content within Hearsay is the **Post Time** functionality. This allows you to schedule a date/time for when the post will publish and be live. Posts can be published instantaneously, at a later date and time, or at a Suggested Time. Hearsay provides **Suggested Times** to post to social networks based on aggregated data.
*Note: If targeting is enabled on Facebook, use the **Post Target** feature to target posts. For LinkedIn accounts, the company page must have more than 300 followers in those geographical locations where the post is being targeted to.*
5. Click on **Publish**.

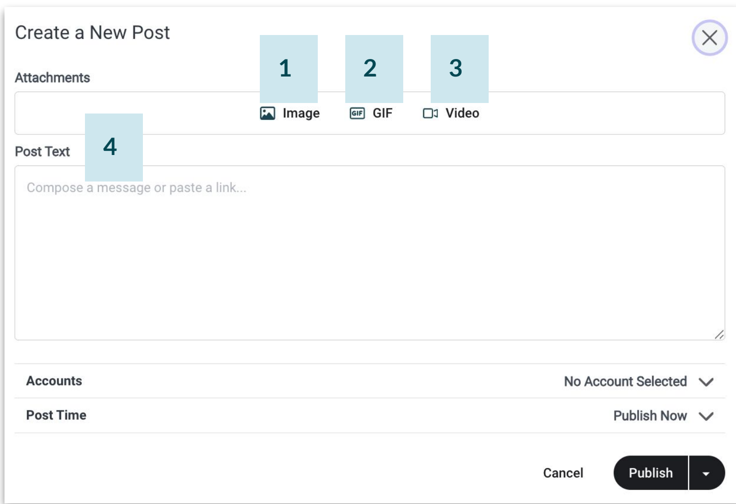
Publishing Custom Content

Depending on your organization's compliance policies, you may be able to post custom/original content within Hearsay.

1. Click on the **New Post** button from the Post Library.



This will open the publisher window.



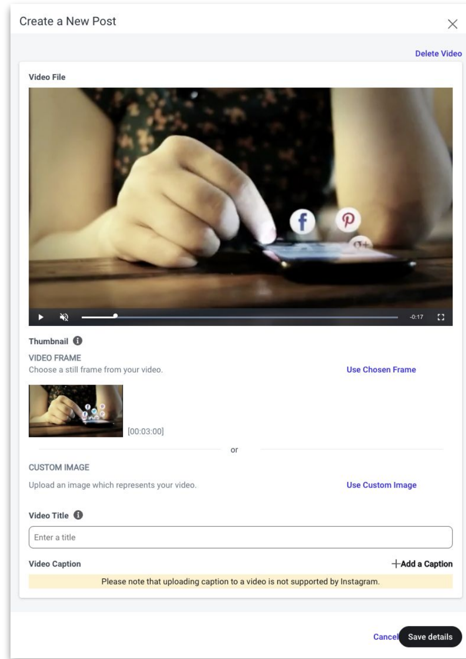
1. If desired, include a **photo/image**. Facebook and LinkedIn allow multiple photos.
2. If enabled, upload a **GIF** (Graphics Interchange Format) - small animations and video footage can be added with your custom post along with a description field for additional text. Note: Hearsay Social currently only supports GIF publishing to Facebook and LinkedIn.
3. If enabled, upload a **video** file to publish to either LinkedIn, Facebook, Twitter, or Instagram.
4. Include a **message, copy, or link**. A link will pull in the thumbnail, header and subheader. Similar to pre-approved content, this is all editable based on your organization's setup. For example, the link can be removed from the publisher box and replaced with custom text and a call-to-action.

After the video has finished uploading, click on the the pencil icon to edit the video. Then select a video frame or custom image as the thumbnail.

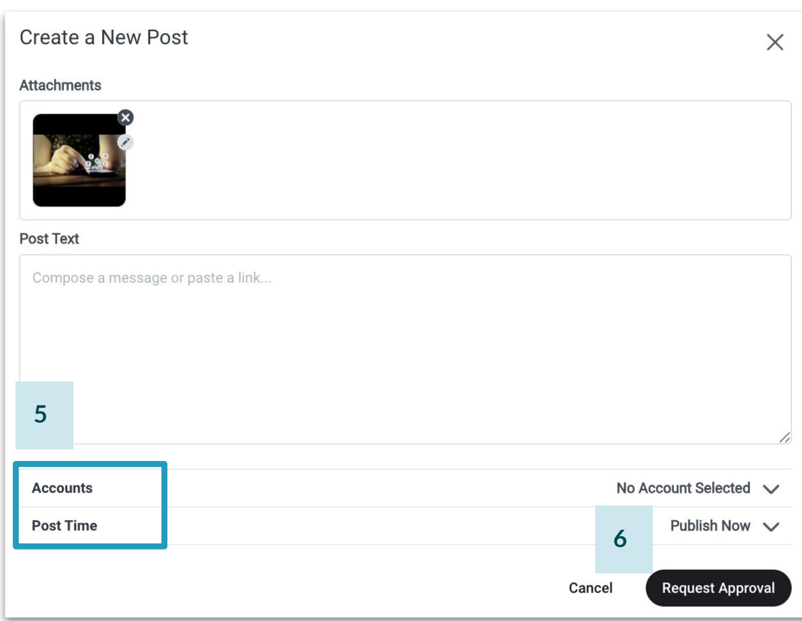
Video Frame Thumbnail: any still frame from the uploaded video
Custom Image Thumbnail: any uploaded image

Please note that social channels have the following limitations regarding video thumbnail support:

- **Facebook:** both video frame and custom image thumbnails are supported
- **LinkedIn:** only the non-autoplay publishing via Hearsay supports both video frame and custom image thumbnails
- **Instagram:** only video frame option is supported



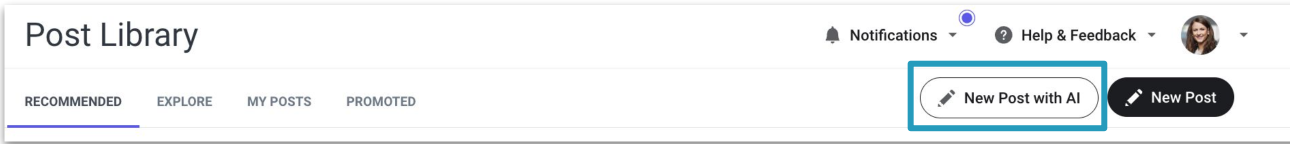
5. Similar to publishing pre-approved content, select the accounts to share the post with and Post Time (instantly or scheduled). Use Post Target if prerequisites for Facebook and LinkedIn are met.
6. Click on **Publish** or select **Request Approval** from the dropdown.



Publishing Generative AI Content

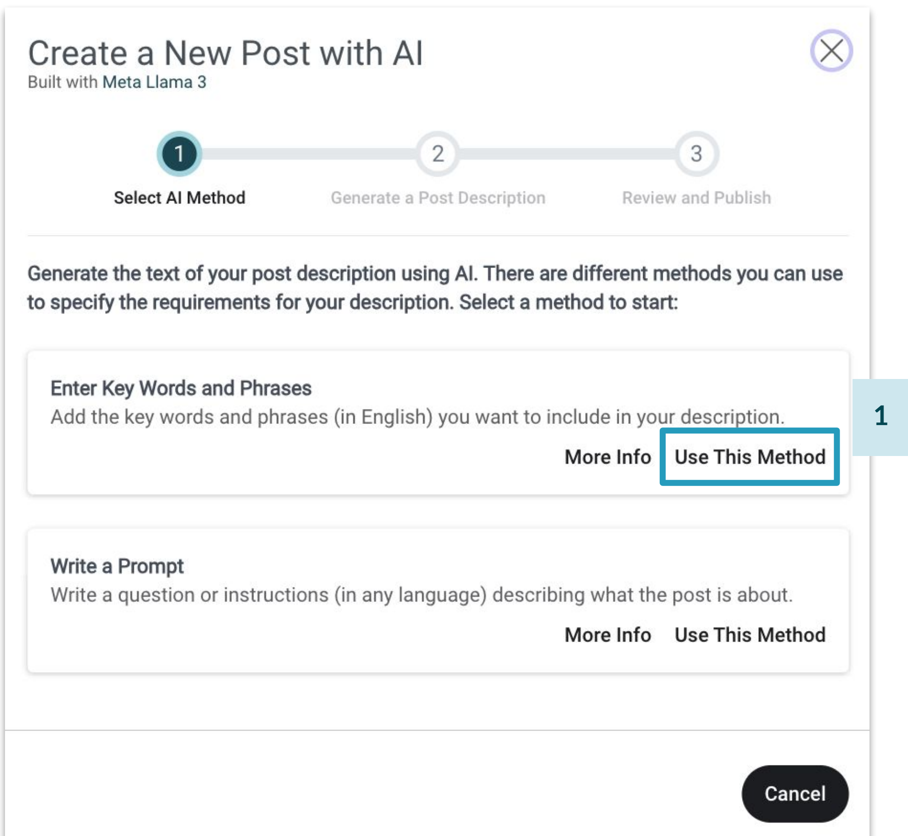
Depending on your organization's settings, users can create a generative AI post by entering key words and phrases (English only) or by writing a prompt (in any language).

Select **Post Library > New Post with AI.**



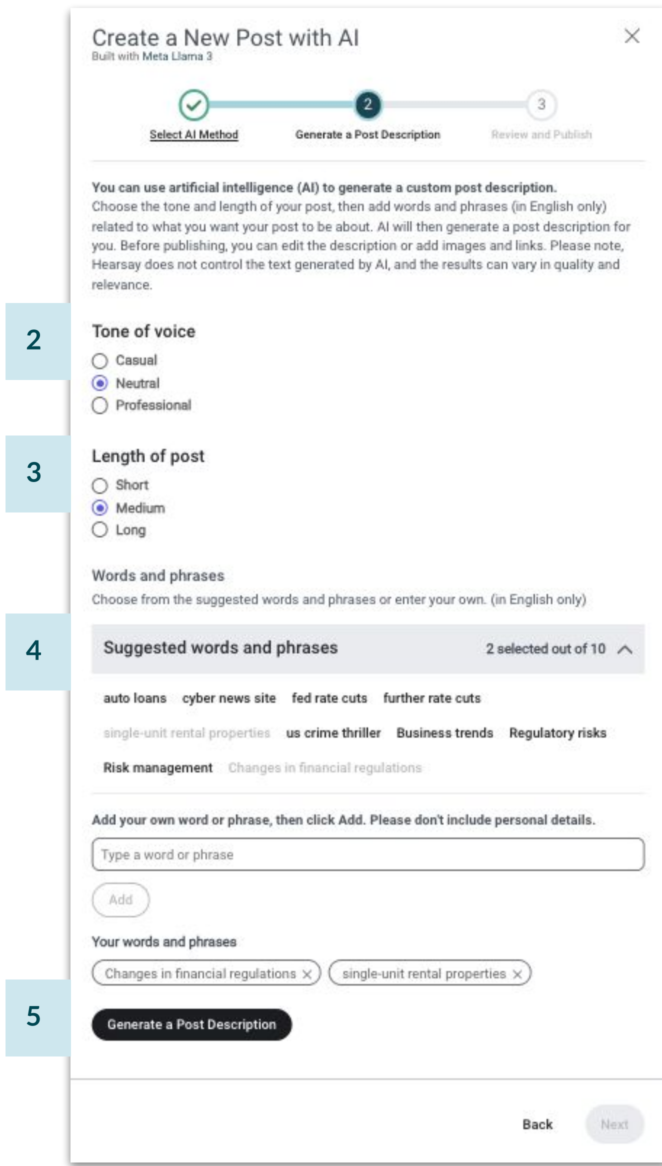
Enter Key Words or Phrases

1. In the Enter Key Words and Phrases box, select **Use This Method.**

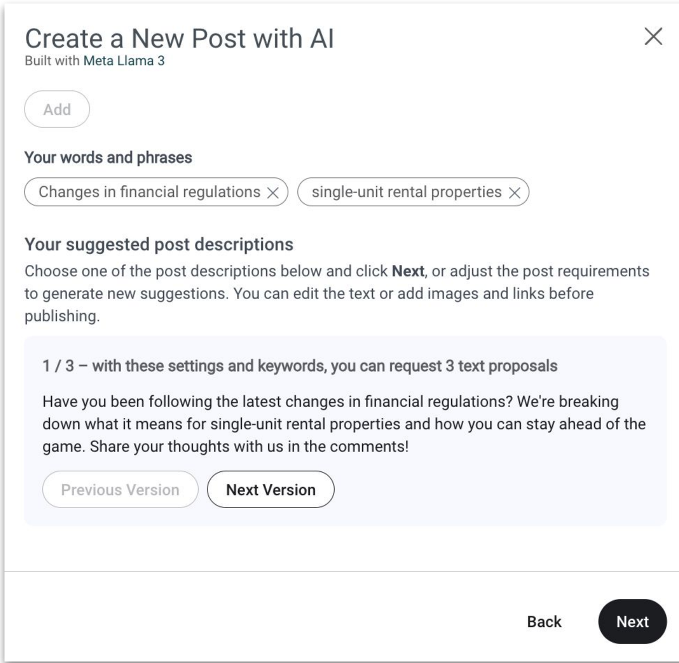


2. Select the **Tone of voice** and **Length of post.**
   Tone of voice:
   - Casual
   - Neutral
   - Professional

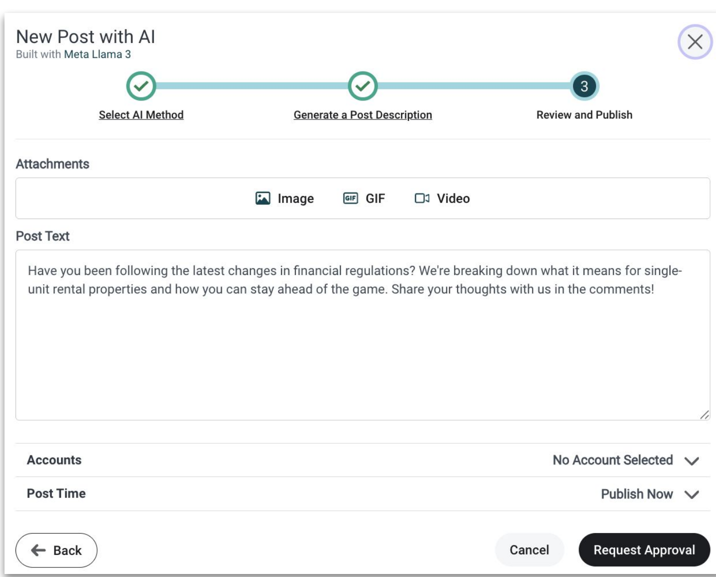
   Length of post:
   - Short: around 1-3 sentences
   - Medium: around 3-5 sentences
   - Long: more than 5 sentences/article-length
3. *Optional*: Pick **Suggested words and phrases.** These are words and phrases Hearsay has identified that might interest you based on recent popular posts among your peers at your organization.
4. Type your own words and phrases you want to include in your post description. After typing each one, click **Add.**
5. Click **Generate a Post Description.**



6. The engine generates three versions of the description, and you can view them by clicking **Previous Version** or **Next Version.** If you don't like any of the descriptions, edit the tone, length, or words and phrases and click **Generate a Post Description** again to start over. *Note: You can edit the description before publishing it.* When you are satisfied with your description, click **Next.**

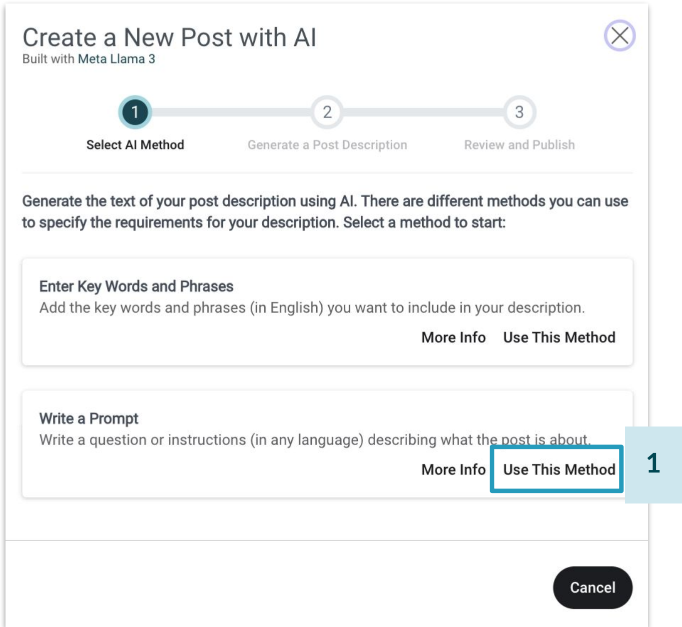


7. On the **Review and Publish** page, make the desired edits to the text, and add any links or images you want to be published with the post.
8. Select which social account(s) to publish the post to and select whether to **publish it now, schedule it for later, or request approval.**

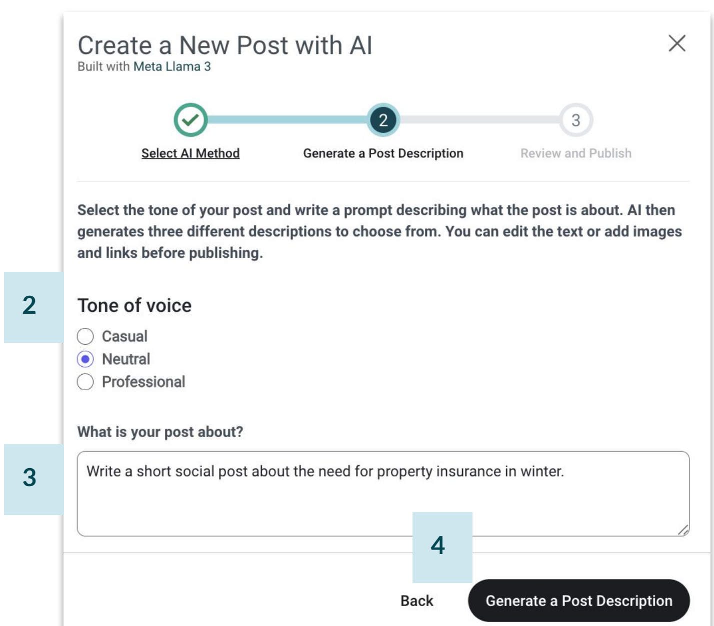


Write a Prompt

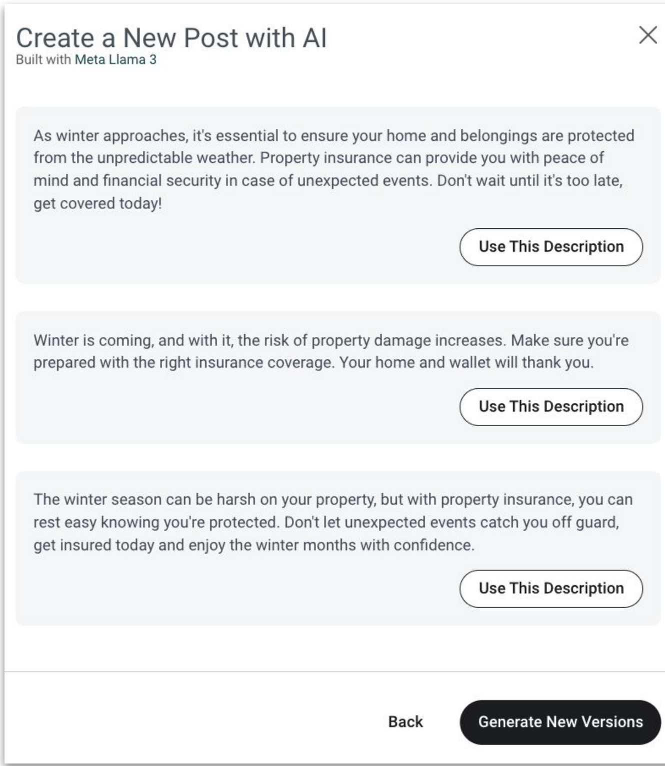
1. In Write a Prompt box, select **Use This Method**.



2. Select the **Tone of voice:**
    - Casual
    - Neutral
    - Professional
3. Under **What is your post about?** write your prompt.
4. Click **Generate a Post Description**.



5. You can generate three post descriptions at a time. If you are unsatisfied with the descriptions, click **Generate New Versions**, or adjust your prompt and generate again. When you're satisfied with a description, click **Use This Description**.



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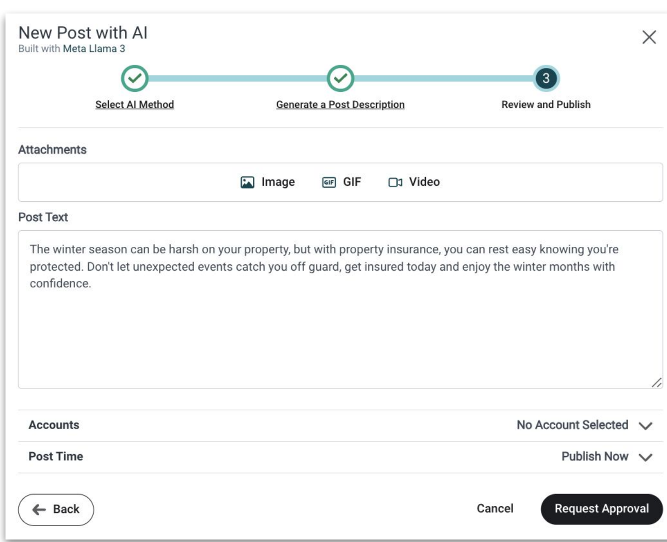
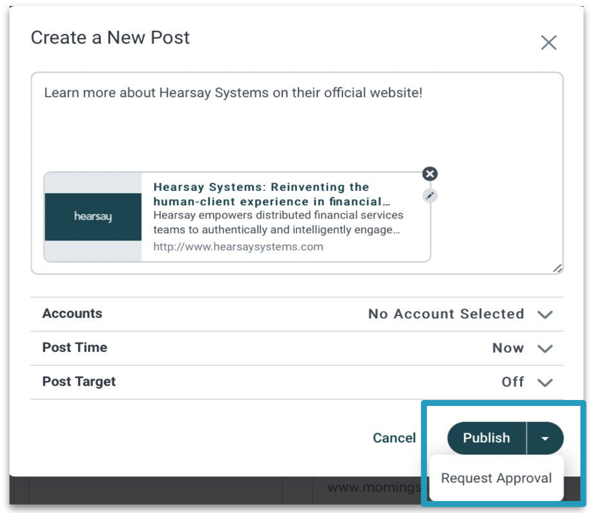


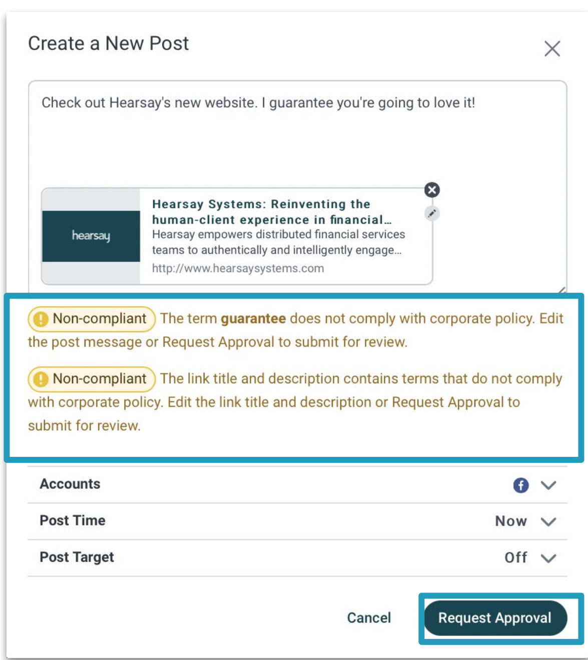
Compliance Guardrails

Per your organization's compliance policy, your custom content may either require you to **Request Approval** or the post will be scanned against your organization's **Lexicon** list of flagged words. These processes are put in place to ensure you are compliant with your social publishing.

Request Approval

Once you've created custom content, you may need to request approval to route your post to your compliance team for review. Only if your team approves the content will it then schedule or publish as created. After creating your custom content post, click on the **Publish** dropdown and select **Request Approval**.





Lexicon Scanning

If your post includes a flagged word from your organization's Lexicon list, Hearsay will prevent the user from publishing/scheduling the post by requiring the user to either remove the word, or click **Request Approval** to submit the post for review to the compliance team.

If there are no flagged words, your custom content will schedule or publish posts instantly.

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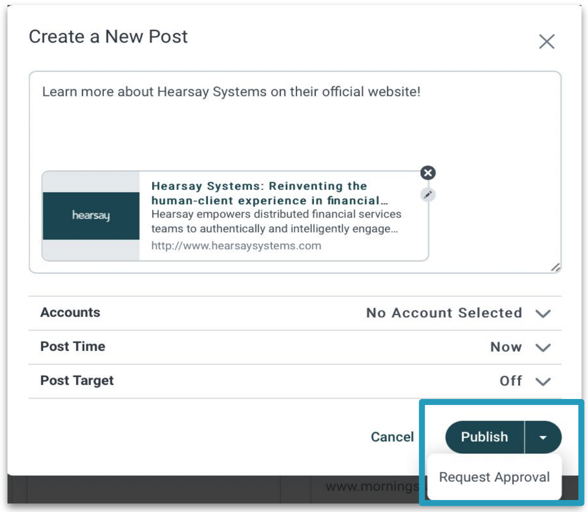

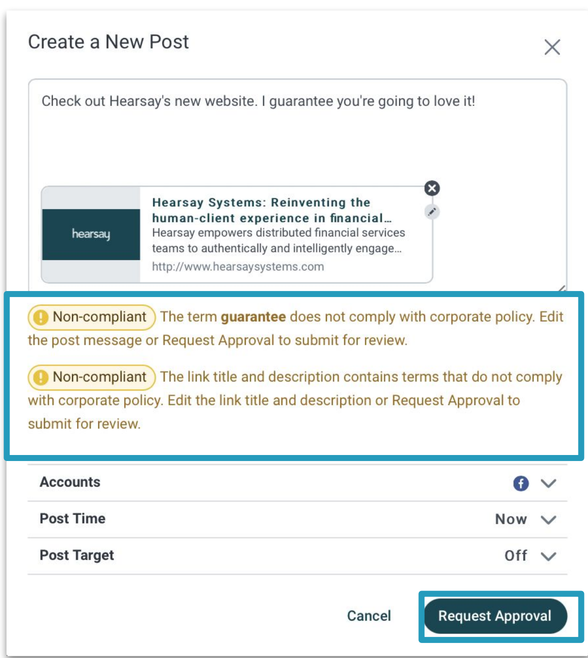

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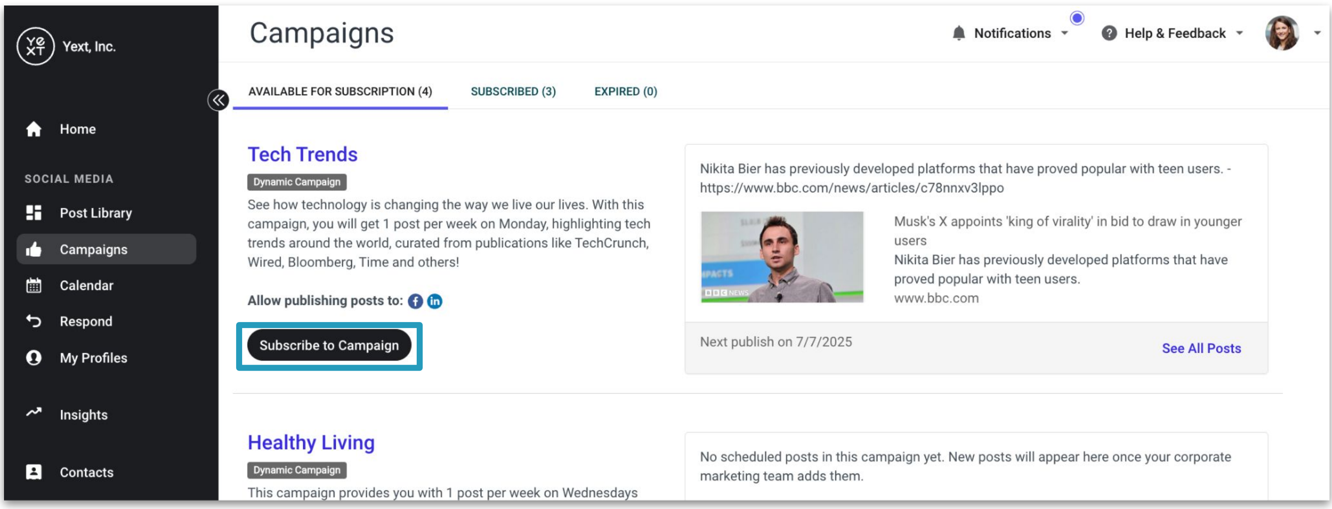
Campaigns

A campaign consists of multiple pieces of content that are grouped together and released separately at timed intervals as a fluid set of posts. They are often centered on a single theme and are released on a staggered basis. To access Campaigns, click on Campaigns under Social Media.



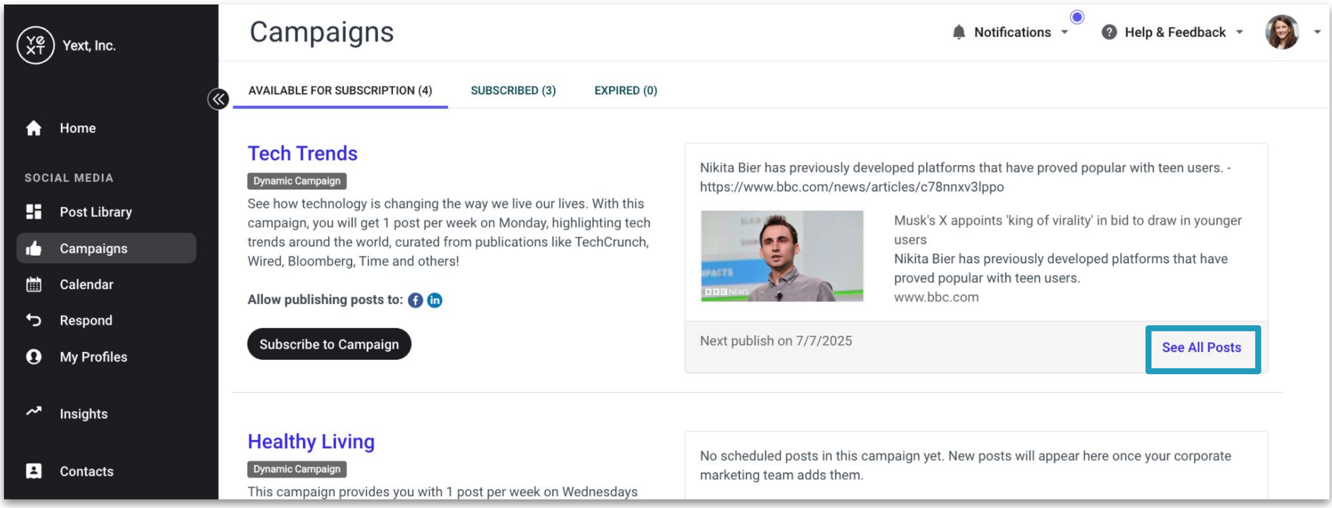
Type of Campaigns

- **Dynamic:** Content within these campaigns have pre-determined dates at which the content will publish, set by your organization's social media and compliance team. Admins can also add additional content to these campaigns. As long as you are subscribed to a dynamic campaign, all existing content, and content added to the campaign after you've subscribed, will still be scheduled on your behalf. Dynamic campaigns usually focus on date-specific content for specific topics.

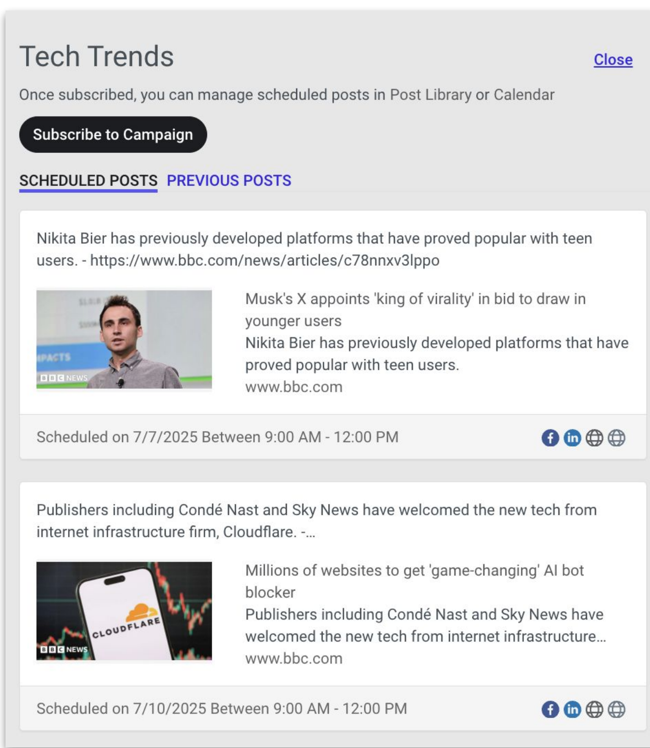
- **Relative:** Content within these campaigns have pre-determined dates relative to once you've subscribed to the campaign (ex: content is set to schedule 1, 2, and 3 days from the date the user subscribed). Relative campaigns usually focus on evergreen content that can be published throughout the year.

Viewing Campaign Content

To view content within a campaign, **Campaigns** under Social Media. Then click on **See All Posts** to the bottom right of the campaign.

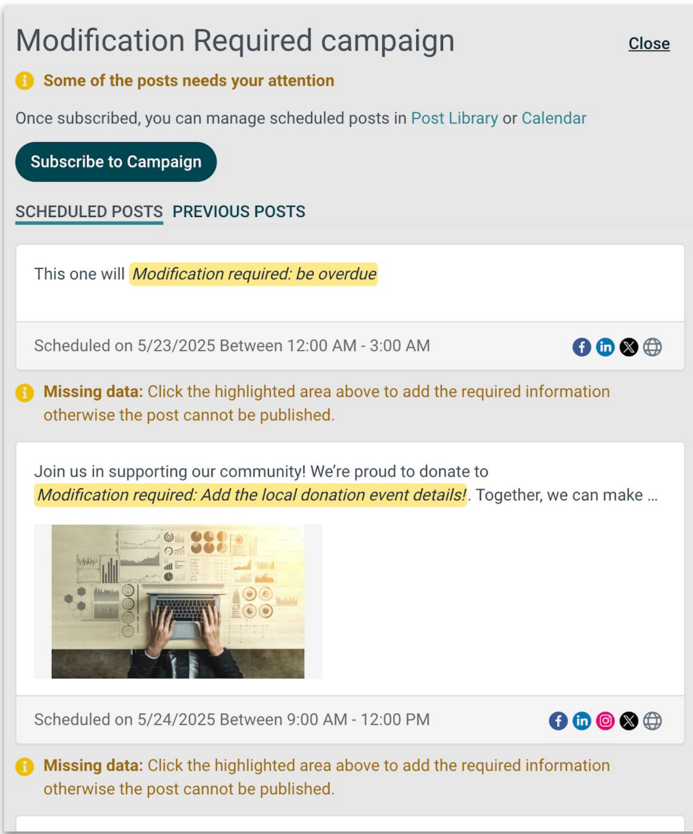


This will display the day and time at which the content will publish and allows the user to read content containing links before publishing. Click on **Previous Posts** to view all posts previously published from this campaign.



Modification Required Content

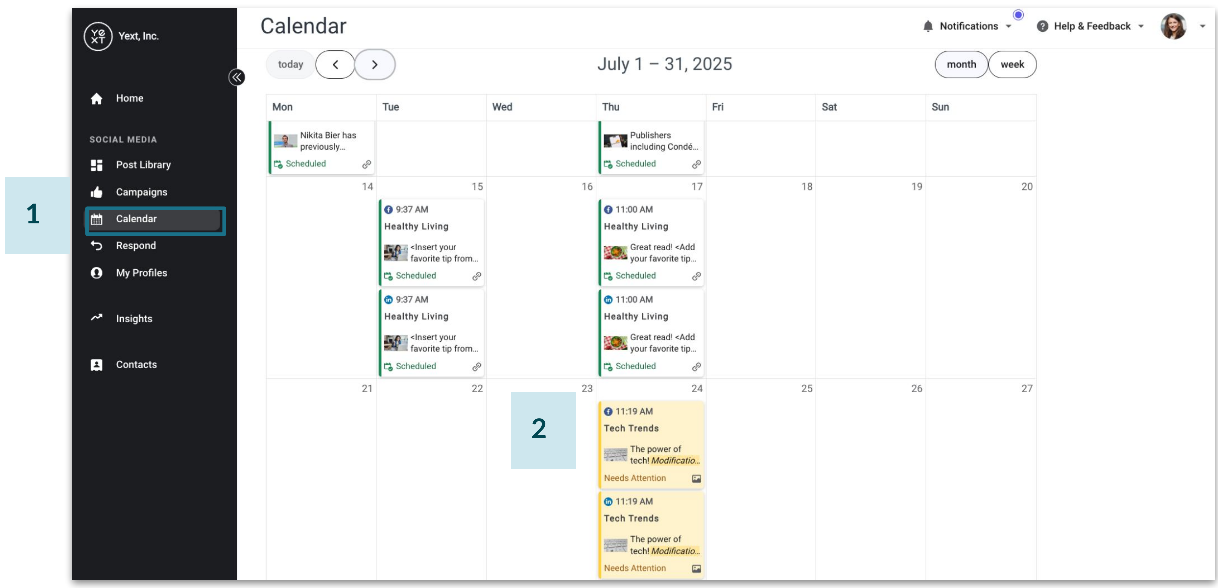
Modifying posts is a way to help personalize the suggested content you share. Campaign posts that require modification are indicated with a yellow highlight embedded directly within the post text that guides you on the modifications to make before the post is published.



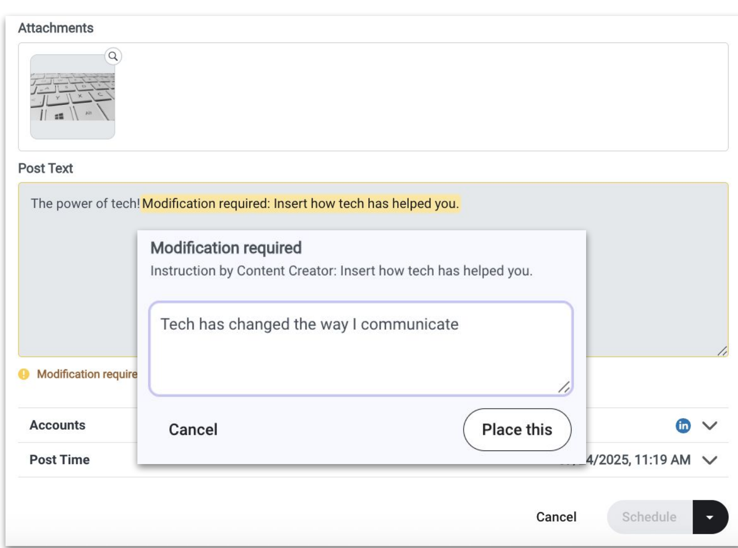
To make the required modifications, first subscribe to the campaign. You can make required modifications from the **Calendar** tab or **My Posts** section of the Post Library.

Modifying Posts from the Calendar

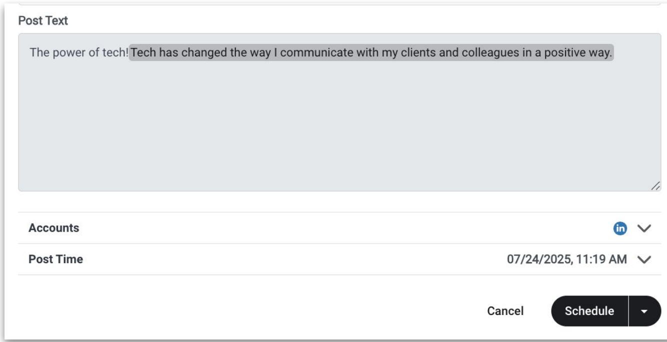
1. Select the **Calendar.**
2. Click on post labeled with **“Needs Attention”.**



3. Make the required edits by first clicking on the highlighted area, then type your personalized content and click **Place this.**

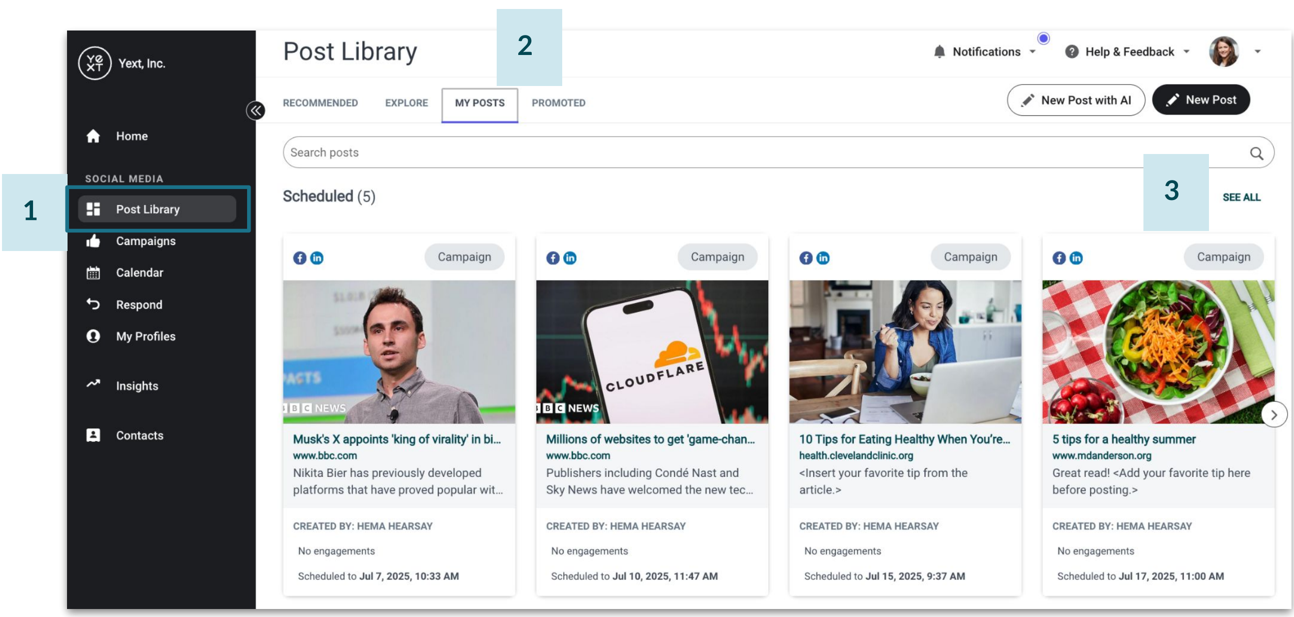


4. Your personalized message will show in the Post Text field highlighted in grey. Click **Schedule** or **Request Approval** to update the post.

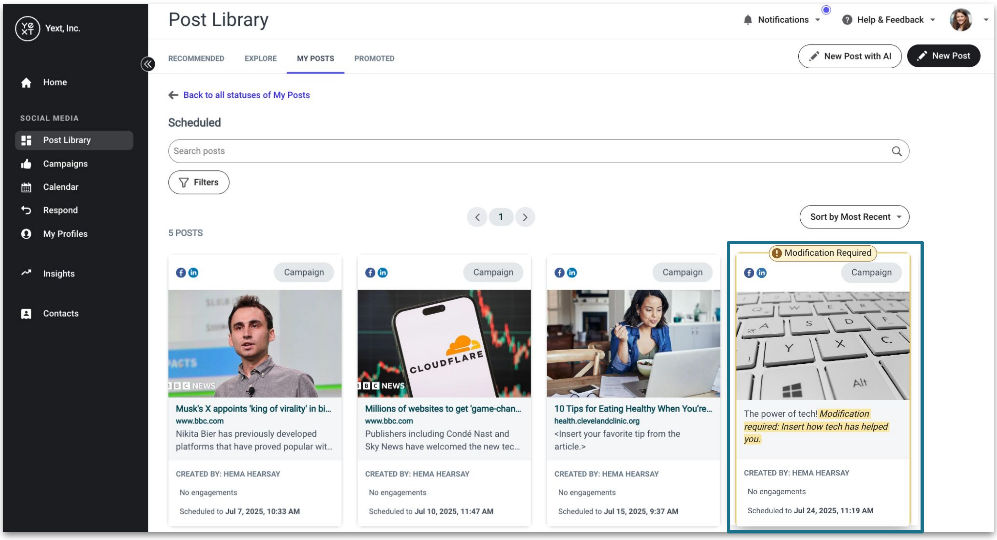


Modifying Posts from the Post Library

1. Select the **Post Library.**
2. Click the **My Posts** tab.
3. From Scheduled section, Campaign posts are labeled with "Campaign" click **See All** to view all Campaign posts.



4. Click on the post labeled as "**Modification Required"**.



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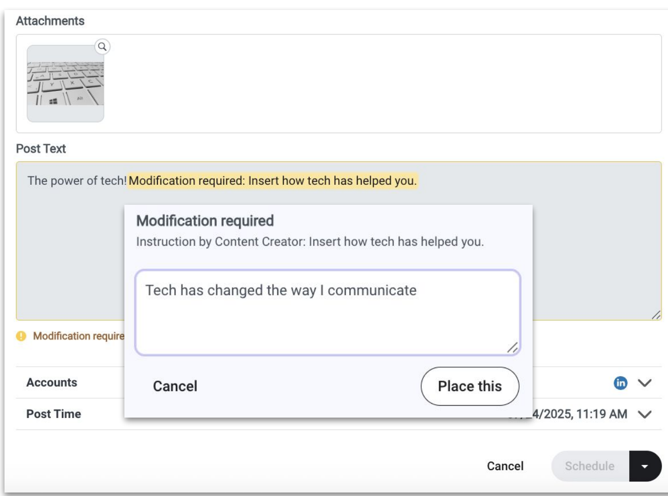

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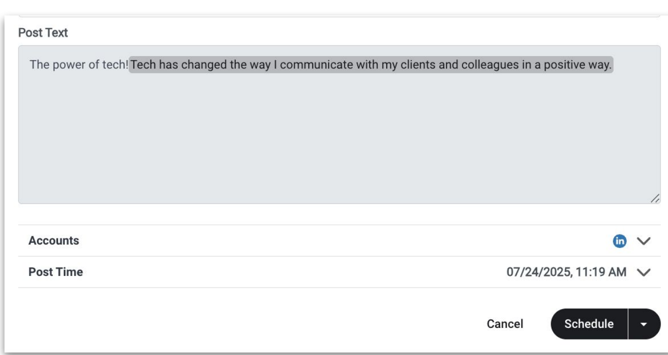
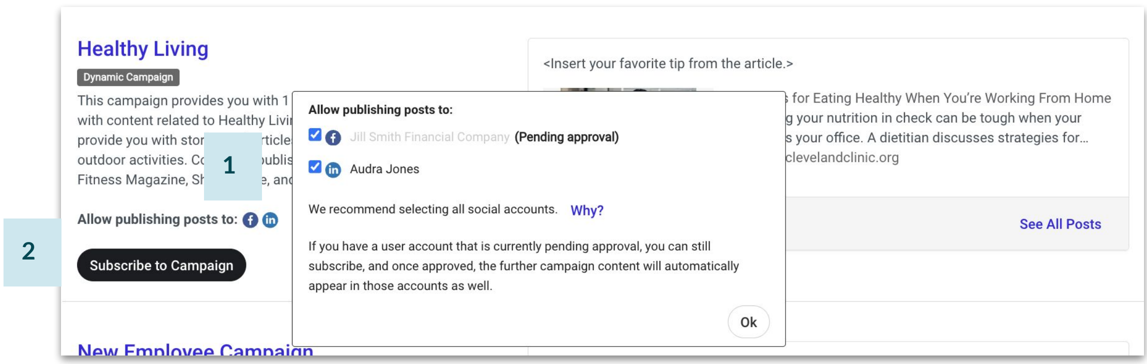


Subscribing to a Campaign

Dynamic and Relative campaigns allow you to ensure that content is always published to your connected social accounts. This is accomplished by subscribing to these campaigns.

To subscribe to a Dynamic or Relative Campaign, click on **Campaigns** under Social Media:

1. Locate a desired campaign and click on one of the social networking site icons to the right of **Allow publishing posts to**. This will show a list of your connected social media accounts the posts will publish to. Select the desired accounts, then click **OK**.
2. Click on the **Subscribe to Campaign** button.

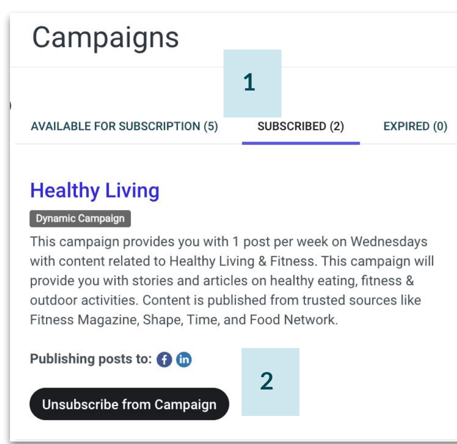


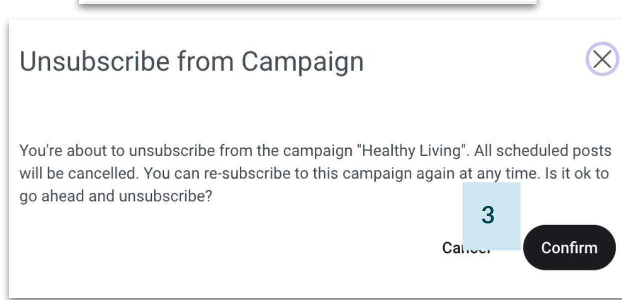
Note: When a new campaign is available to you, it will be listed on your Home Page under Recommended Actions. You may also receive an email that a new campaign is available.

Unsubscribing from a Campaign

To unsubscribe from a Dynamic or Relative Campaign, click on Campaigns under Social Media:

1. Click on the **Subscribed** tab.
2. Locate the campaign to unsubscribe from and click **Unsubscribe from Campaign**.
3. Click **Confirm** on the confirmation popup that appears.

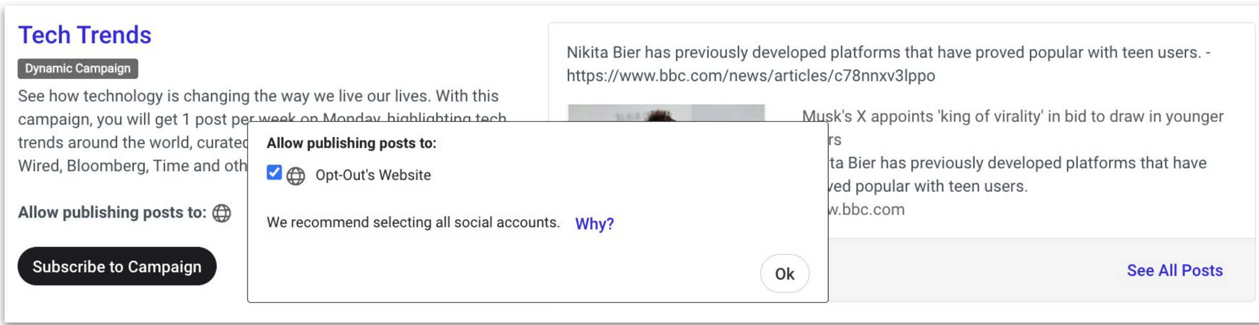




Third-Party Sites

If third-party publishing is enabled for your organization, users are able to add third-party Sites accounts to Hearsay campaign subscriptions.

The Account List modal for each campaign will list third-party Sites.



When viewing posts within the campaign, all subscribed accounts, including third-party Sites will be listed in the Campaign Details section.

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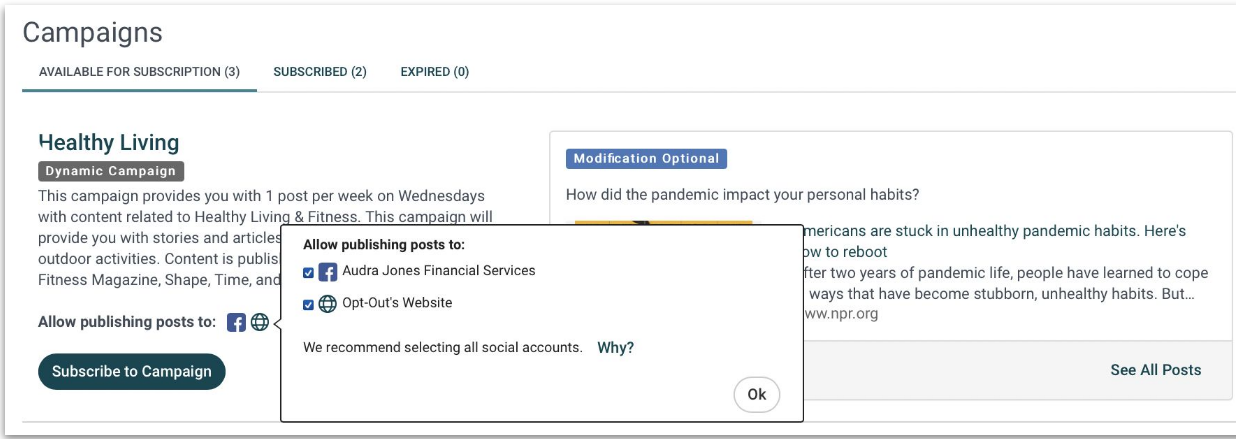

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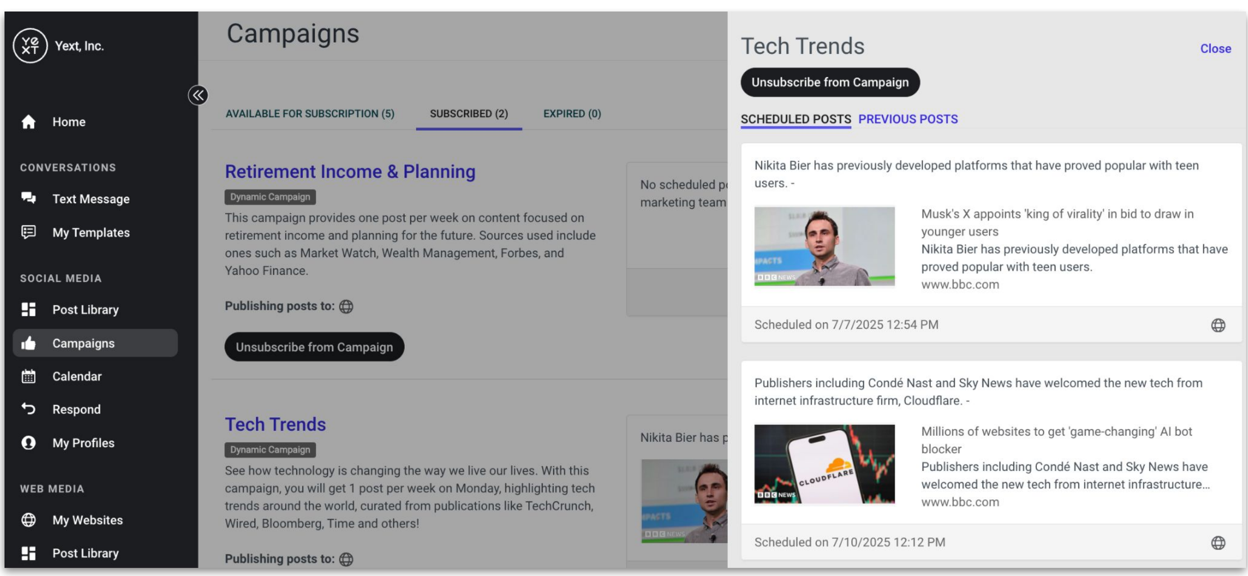
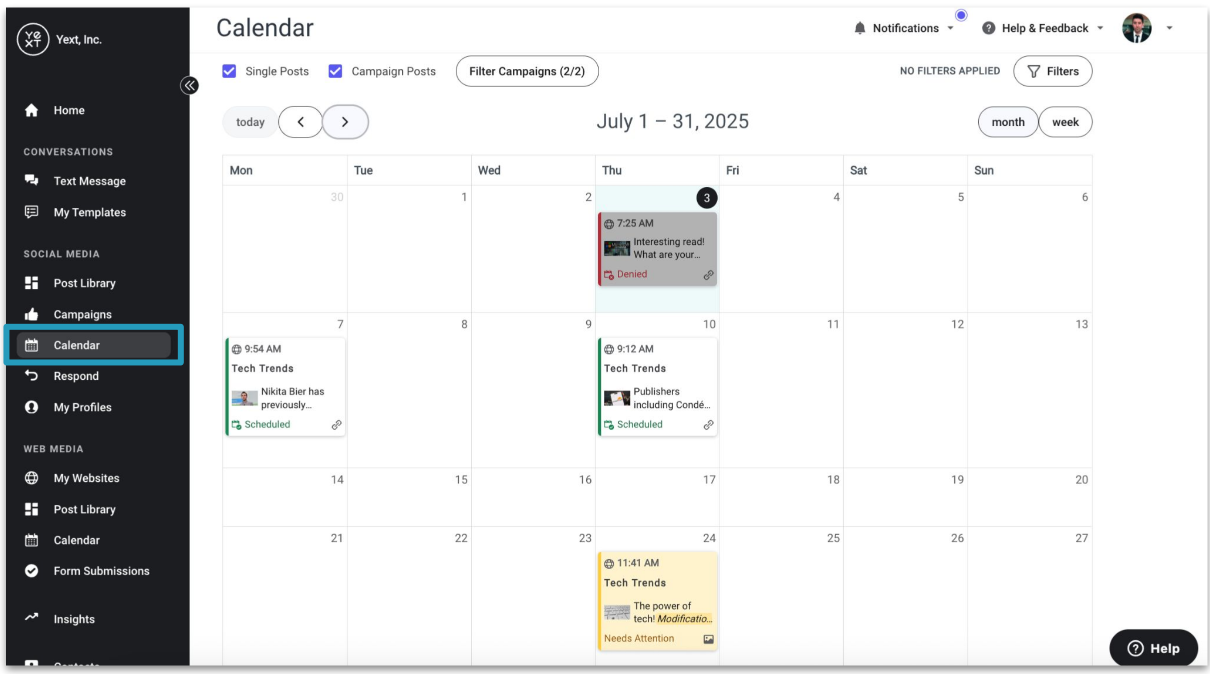


Calendar

The calendar view will display all of your scheduled posts and allow you to easily make updates to posts. Click on Calendar under Social Media to view your scheduled posts and their current status.

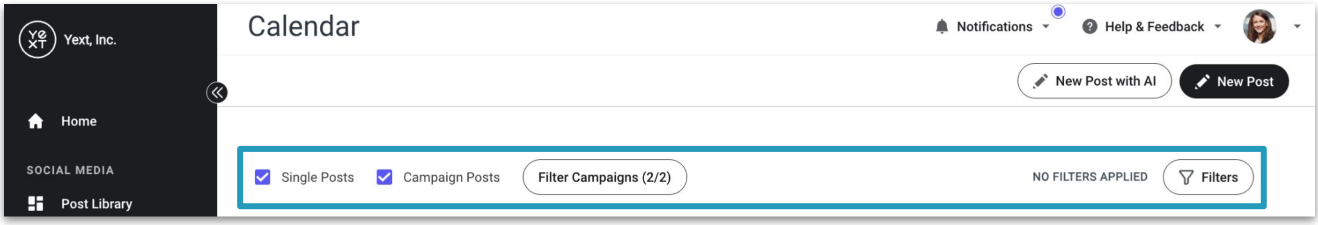


The color coding on the calendar indicates the status of the post.

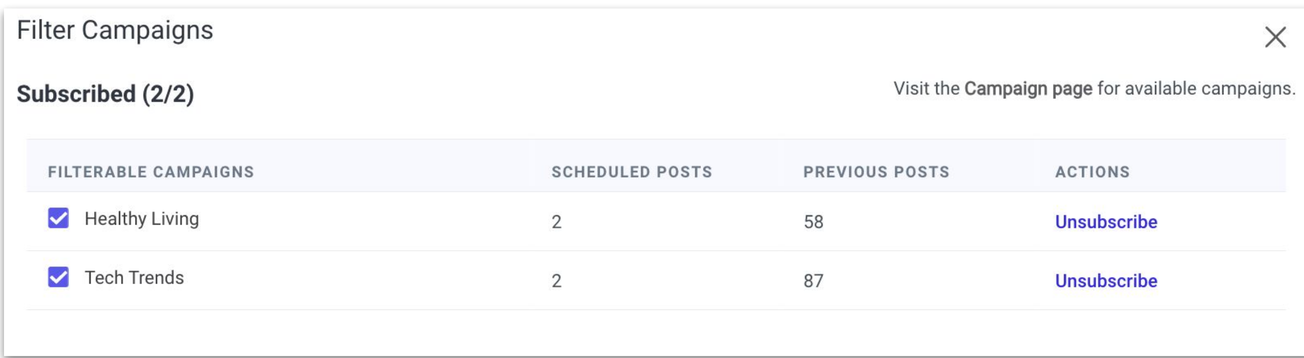
- **Green (Scheduled):** Successfully published or scheduled to publish, with no action required
- **Yellow (Needs Attention or Pending):** Needs to be updated by the user
- **Red (Publishing Error or Denied):** Failed to publish for technical reasons, or denied during review process; requires user action to publish

Calendar Filters

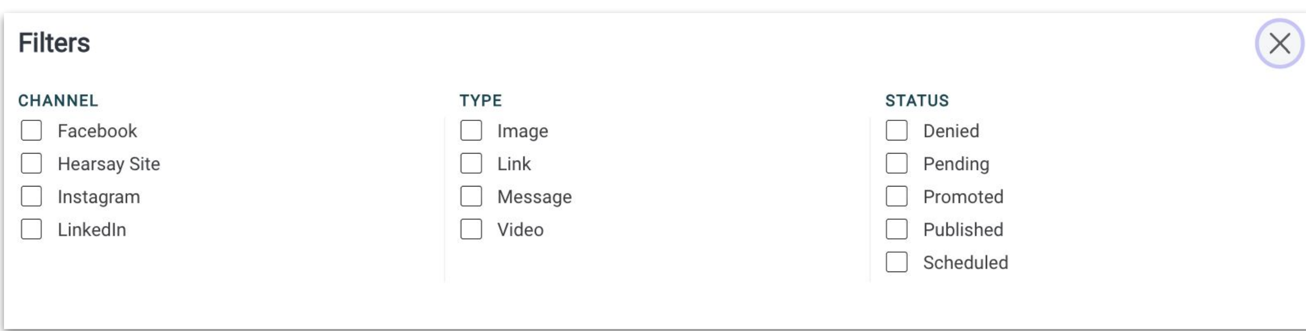
Calendar filters are shown at the top of the calendar.



1. **Single Posts :** filters for individual posts created from the New Post button or Suggested Post Library.
2. **Campaign Posts :** filters for campaign posts and provides an additional option to click on the **Filter Campaigns** button. Campaign names will be displayed and users can click **Unsubscribe** or click on the **Campaigns page** link to manage subscriptions.



3. The **Filters** button to the right provides the option to filter by channel, type, or post status.



Changing the Date and Time of a Scheduled Post

There are two ways to change the date and time of a scheduled post:

1. Drag and drop the scheduled post to a new date and time on your calendar.
2. Select the scheduled post and change the post time.

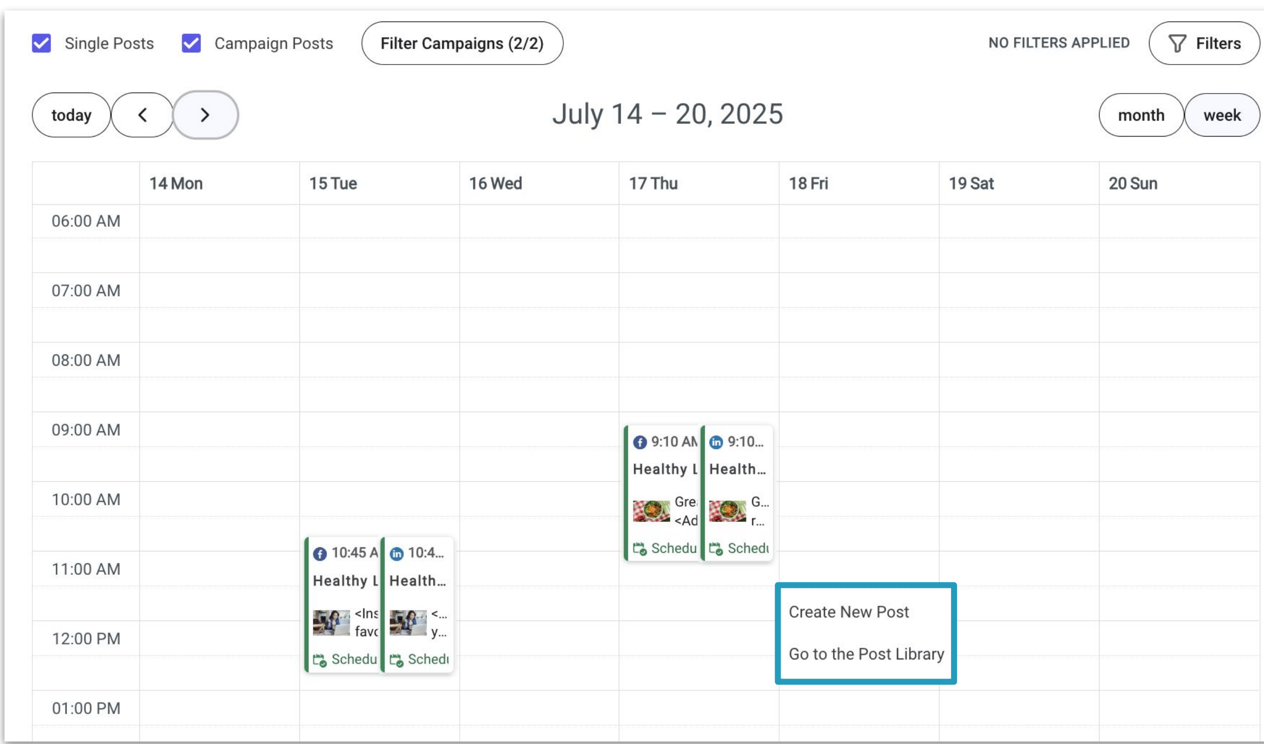
Note: For detailed information on accessing and changing the Post Time, refer to the *Scheduling a Post* help center article.

Creating a New Post

To create a new post via your calendar:

1. From the Week view, click on the date and time on the calendar for which you would like to schedule the new post.
2. Select **Create New Post** to create an original post or **Go to the Post Library** to select a post from the **Suggested Post Library.**

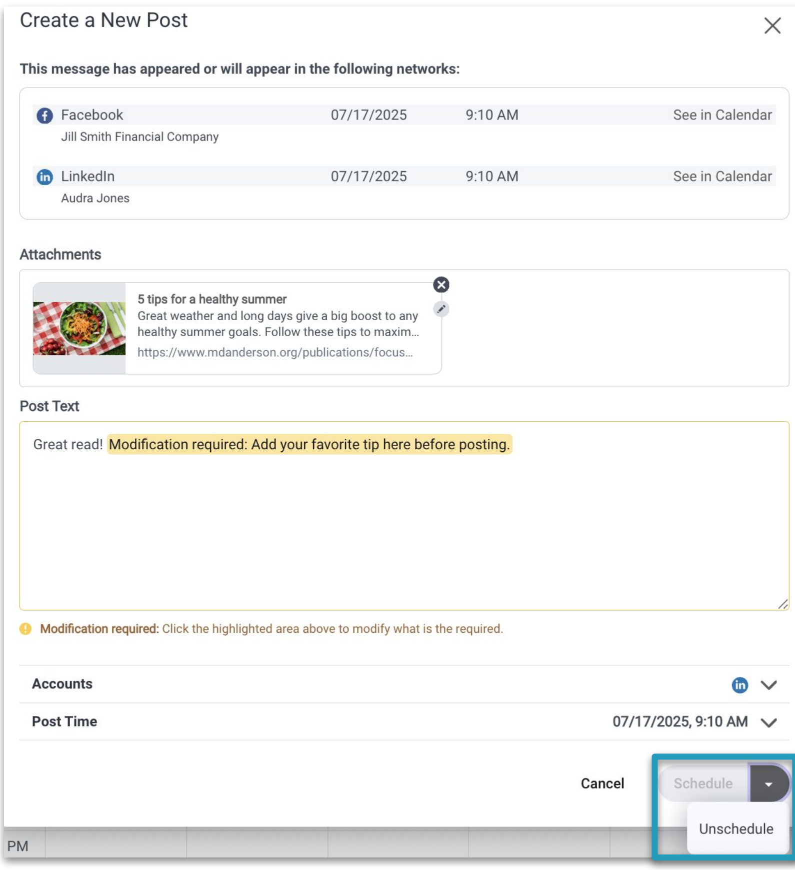
Note: For more information on creating a new post, refer to the *Creating a New Post* help article.



Unscheduling a Post

To unschedule a post:

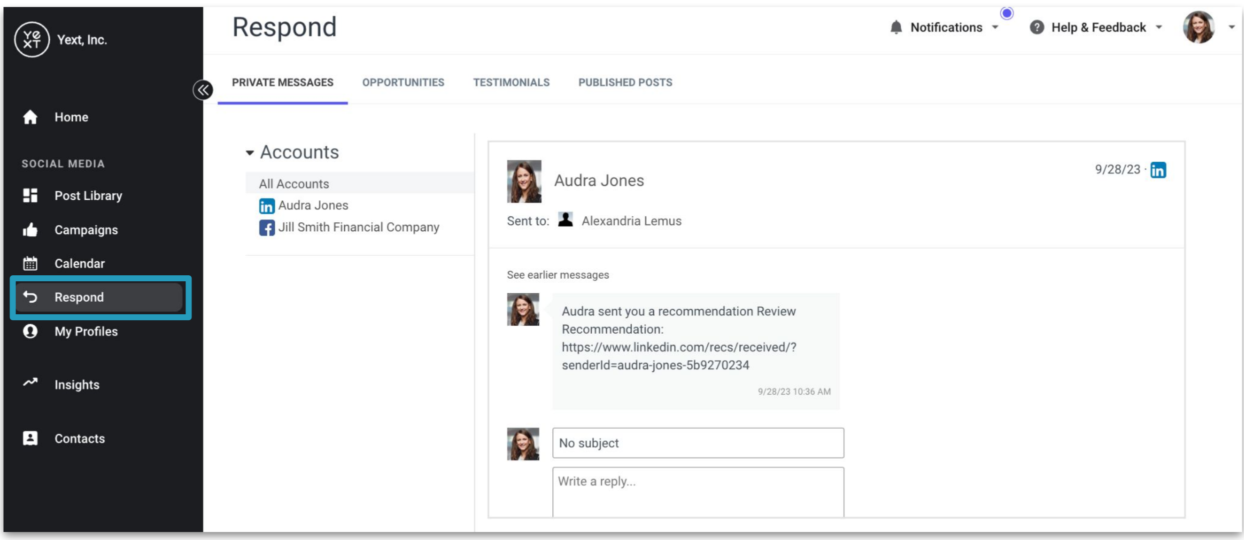
1. Select the post to unschedule on your calendar.
2. Click on the **Schedule** button dropdown arrow.
3. Select **Unschedule**.
4. Select **OK** in the confirmation pop-up box.



Respond

You can access Private Messages, Opportunities, Testimonials, and Published Posts by clicking on Respond under Social Media.

Any responses to the posts you publish to your connected social accounts are displayed under the Public Comments tab. From here, you can view responses, interact with people who have responded to your posts, and if required by your compliance policy, request approvals.



Respond Menu

- **Private Messages:** Respond to any private messages from your social connections.
- **Opportunities:** Track and manage your social signals.
- **Testimonials:** View and classify your testimonials.
- **Published Posts:** View your post history on your social accounts and respond to comments/engagements on each post from this tab.

Opportunities

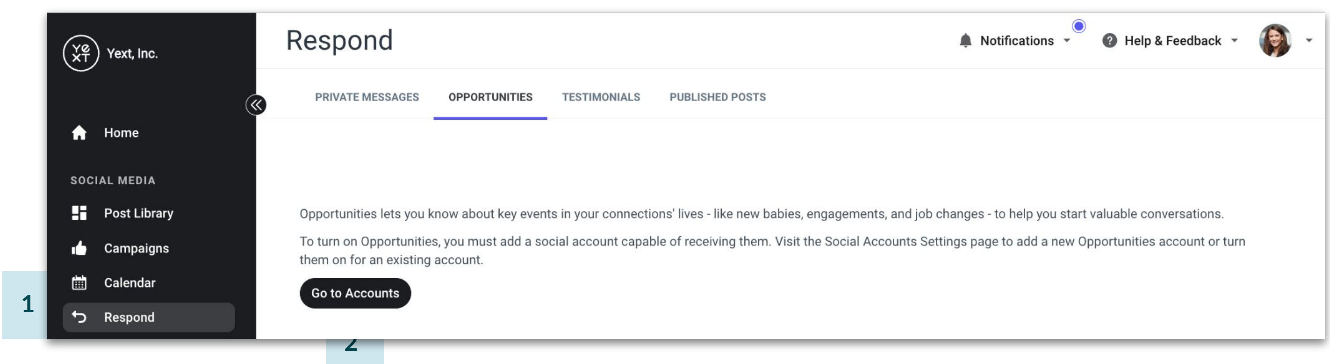
When individuals take a moment to wish us Happy Birthday, it signifies that they pay close attention to important moments taking place in our lives. Other milestone events could be moving to a new location, getting married, having a child, getting a new job, promotion and more. These moments create opportunities for others to reach out and wish us well or to let them know we're here to support them. With Social Signals, you'll never miss an important moment taking place in your audience's lives, and your audience will be sure to notice it.

If you have a Sales Navigator or Business Plus LinkedIn Premium Account, you have access to Social Signals from LinkedIn. Hearsay will provide you a dashboard to ensure that you never miss an important moment taking place in your audience's lives.

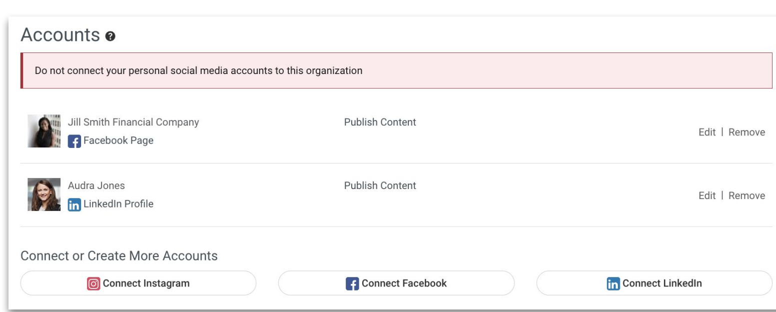
Enabling Social Signals

Make sure you have a Sales Navigator or Business Plus LinkedIn Premium Account.

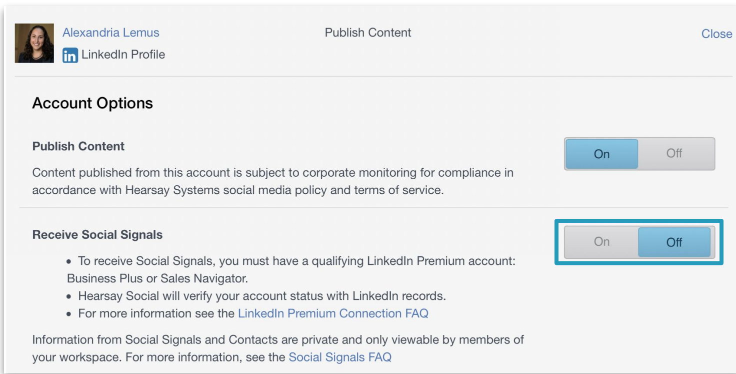
1. Log into Hearsay Social and click on Respond under Social Media.
2. Click on Go to Accounts. If you do not have an account connected to your workspace, be sure to connect an account first (see Connect Accounts page 6).



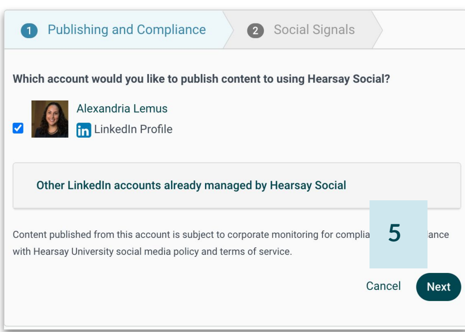
3. Click on **Edit** next to your LinkedIn profile. If you're connecting LinkedIn for the first time, click **Connect LinkedIn** at the bottom and enter in your LinkedIn login credentials.

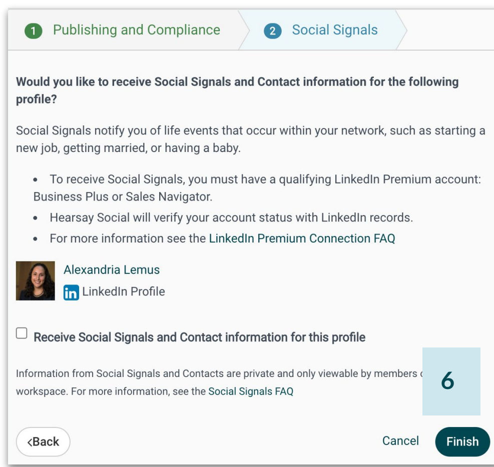


4. Switch the Receive Social Signals toggle to On.



1. Checkmark the box next to your LinkedIn profile and click **Next.**
2. On the following screen, checkmark the box that says "**Receive Social Signals and Contact information for this profile.**" Remember, only Sales Navigator or Business Plus LinkedIn Premium Accounts will be able to checkmark this box successfully. Click **Finish** to complete the process.



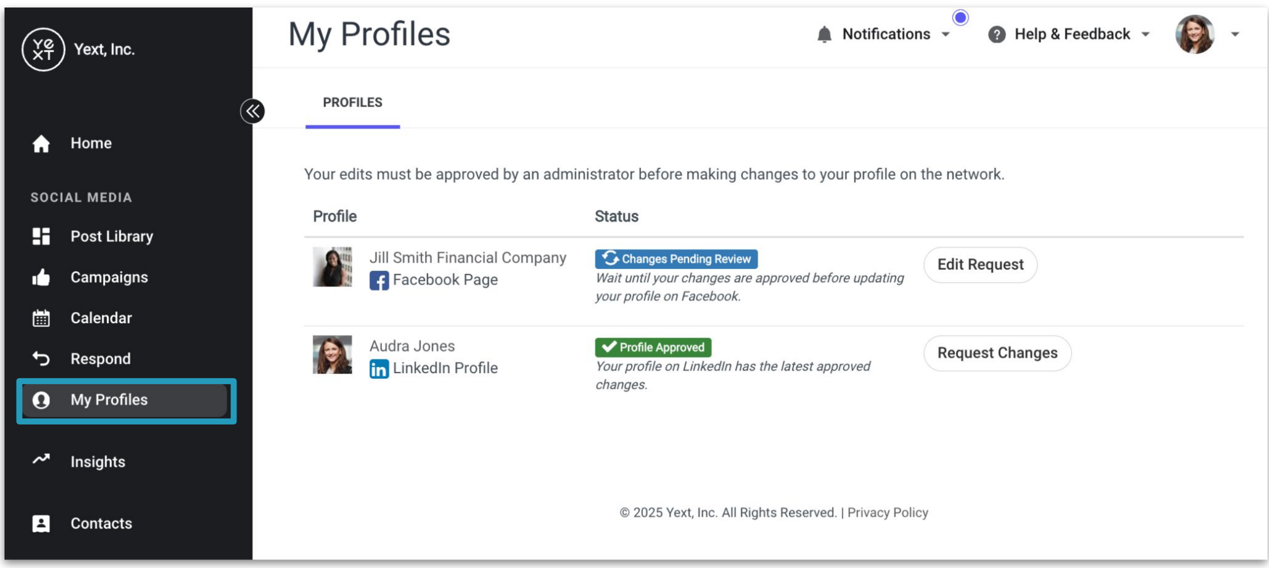


Using Social Signals

1. Once your LinkedIn Profile is properly connected and set to receive Social Signals, click on **Respond** under Social Media and then select **Opportunities** from the navigation bar.
2. Over time, Signals will populate. Click on the arrow to expand a signal in order to review it in greater detail. From here, you can label:
    - which signals you plan to follow up on
    - which signals you've already addressed
    - which signals you wish to remove and dismiss
3. You can also choose **Mark As Inaccurate** if you have reason to believe the end-user updated their LinkedIn account incorrectly.

My Profiles

Your social media profiles include static information that describes you and your business and is publicly viewable. In order to meet regulatory and social media policy obligations, your organization may require approval of your social media profiles by a system or compliance administrator, possibly before you are permitted to post, tweet, like or take other social media actions. To access all profiles under your workspace, click on **My Profiles** under Social Media.



Profile Statuses

- **Profile Pending Review:** This status will display the first time you connect to Hearsay Social. Your admin/compliance team will approve or deny your social media profile. No action is required by you.
- **Changes Pending Review:** This will display if you have made changes and resubmitted your profile for approval. Your admin/compliance team will approve or deny the changes to your social media profile. No action is required by you.
- **Profile Approved:** After your profile has been approved and auto-uploaded to your social media network(s). No action is required by you.

(Profile Statuses continued on next page)

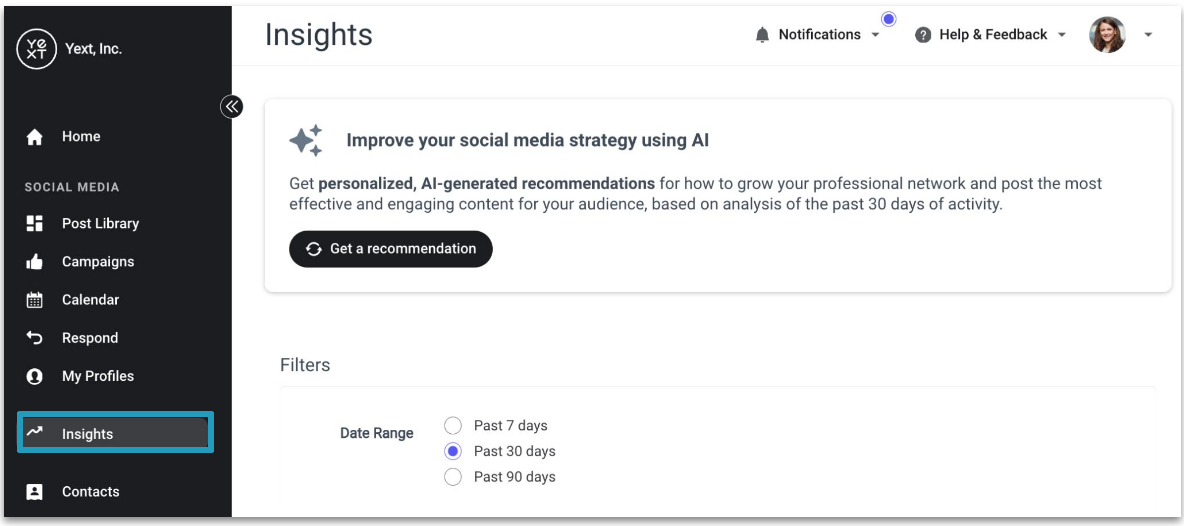
Profile Statuses (continued)

- **Changes Denied: I**f any of the information you have provided has been denied due to a compliance issue within your organization. In this case, you will receive an email notifying you that your recent profile request has been denied.
- **Action Required:** The changes to your profile have been approved, but the changes cannot be auto-uploaded to your social media network. You must manually copy/paste the approved content to your social media network.
- **Changes Suggested:** Hearsay Social will allow Supervision Administrators to review social media profiles, suggest edits to profile content, and route the profile, with suggestions, back to the user to be published to the social network. The user can either accept these changes or choose to revise and resubmit.

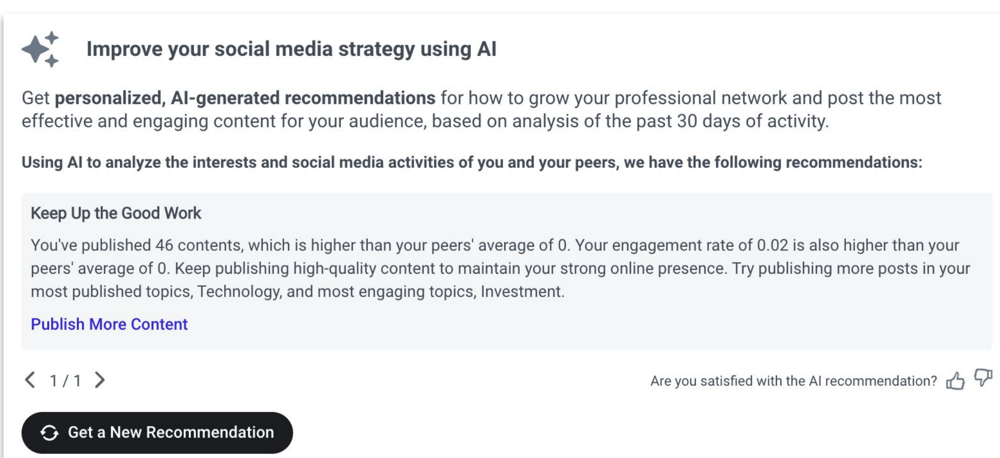
Insights

Social Insights help you understand your social activity within the social networks you have connected to your workspace by providing metrics for the past 30 days.

To access your Insights, select the **Insights** tab on the side navigation bar. The **Improve your social media strategy using AI** section in the Social Insights dashboard gives recommended actions for optimizing social media usage.



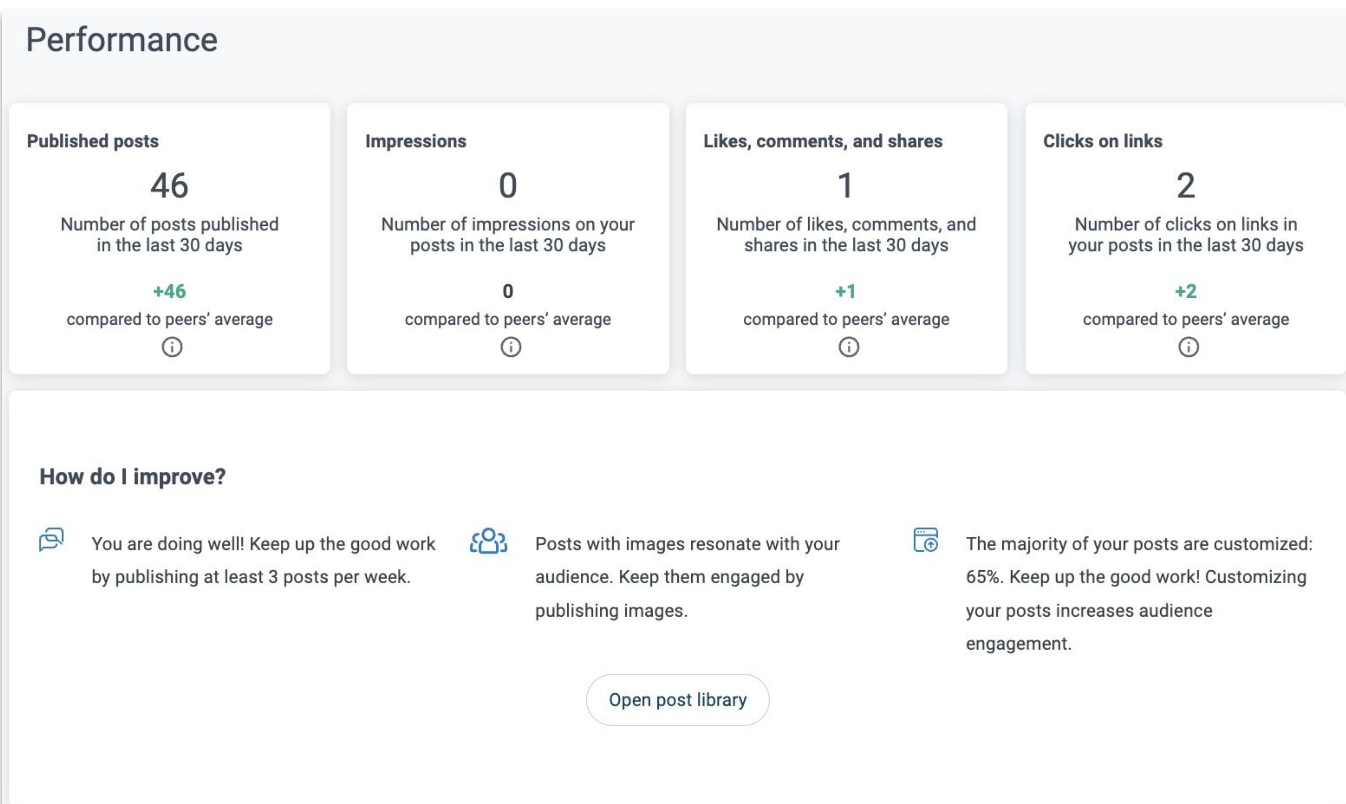
Clicking **Get a Recommendation** leverages AI to analyze the user's social media performance, compares it to their peers' performance, and provides suggestions for improvement. Users can generate up to eight recommendations to explore alternate approaches and rate the recommendations they receive.



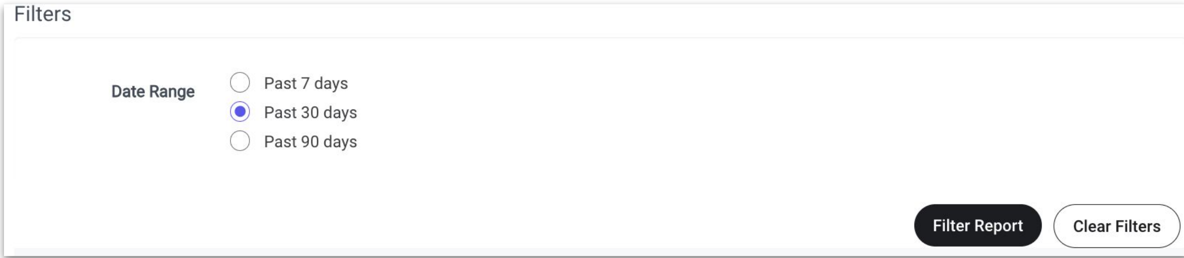
The Insights dashboard shows performance over the past 30 days. These metrics include:

- Number of published posts
- Number of impressions
- Number of likes, comments and shares
- Number of clicks on links
- Number of connections and followers
- Top interest categories for the user, based on our AI engine's analysis of their search and publishing history
- Top interest categories for the user's audience, based on our AI engine's analysis of audience engagement with the user's posts.
- Top performing posts of the user
- Top performing posts of the user's peers

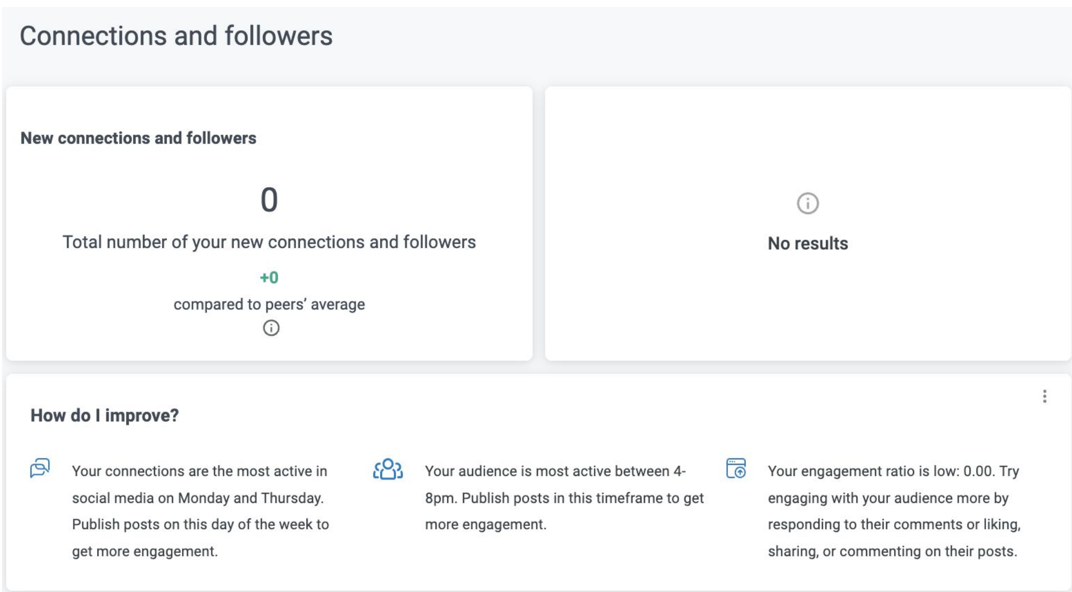
The numerical metrics are also paired with hierarchy-level benchmarks, which provide comparison figures of how the user is performing versus their peers.



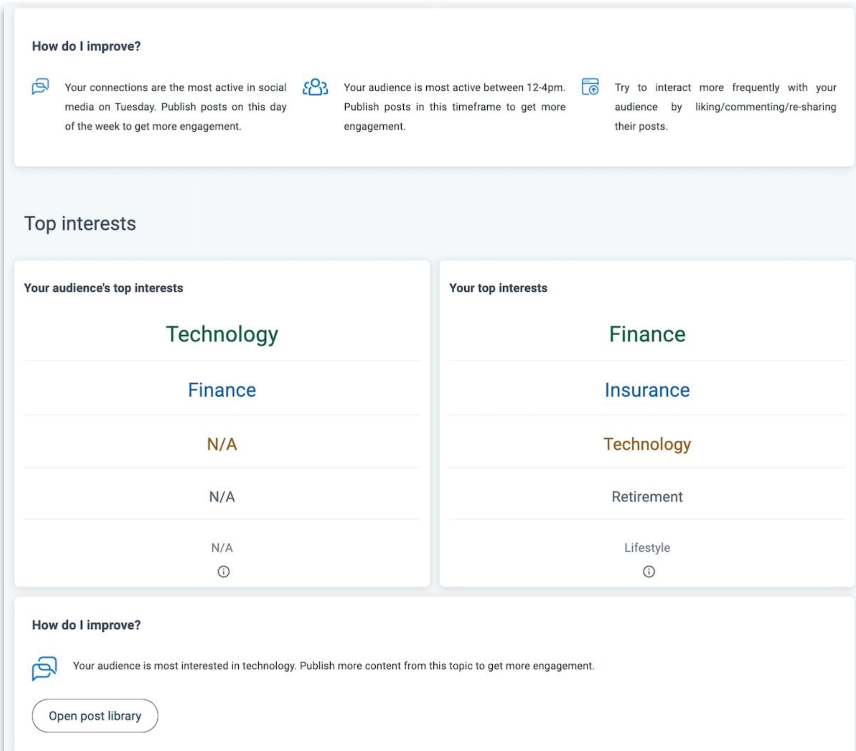
The Filters at the top allow you to filter data for the past 7, 30, or 90 days.

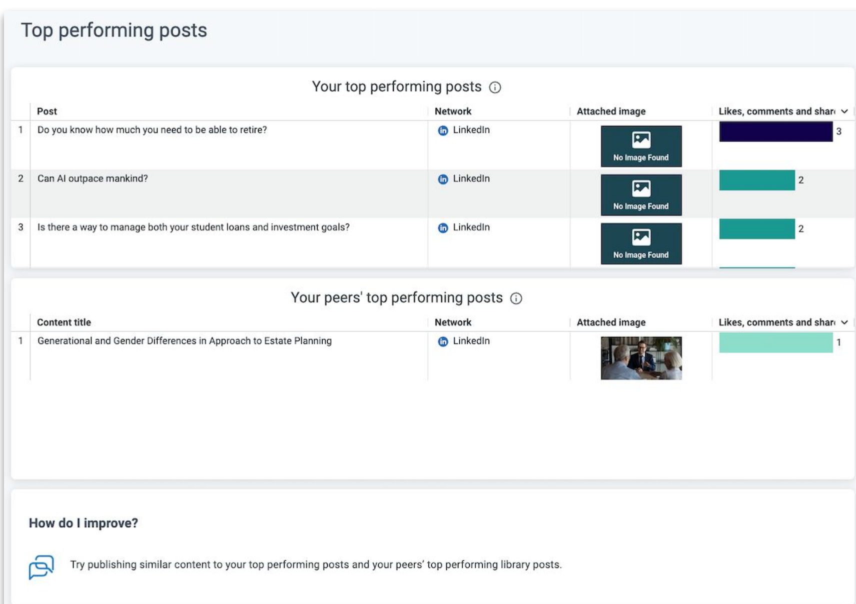


View your connections and followers.



Users also see personalized recommendations based on their individual, group and organization-level measures. These recommendations provide guidance on what users can do differently to improve their social media presence and performance.





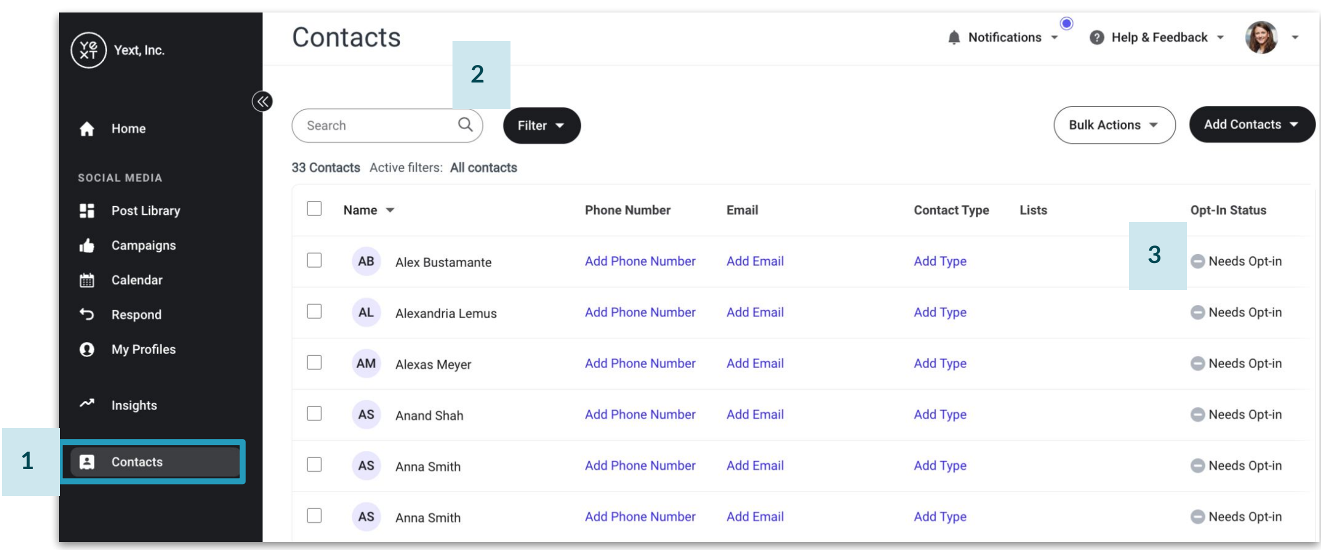
Contacts

Hearsay Social makes it easy to search through your existing contacts across the entire workspace to maximize opportunities on social media right from the Contacts tab. You can search through your existing connections to your social accounts and classify the type of contact. The contact type helps you to gain valuable customer journey insights by tracking where your customer is in the marketing funnel. The available contact types are “Prospect”, “Lead”, “Client”, “Other”, “None” and “Internal”.

Note: Only the social accounts that you have connected to Hearsay Social will return search results. For example, if you have your Facebook and LinkedIn accounts connected to Hearsay Social, search results will be displayed for only those two social networks.

Search for Contacts

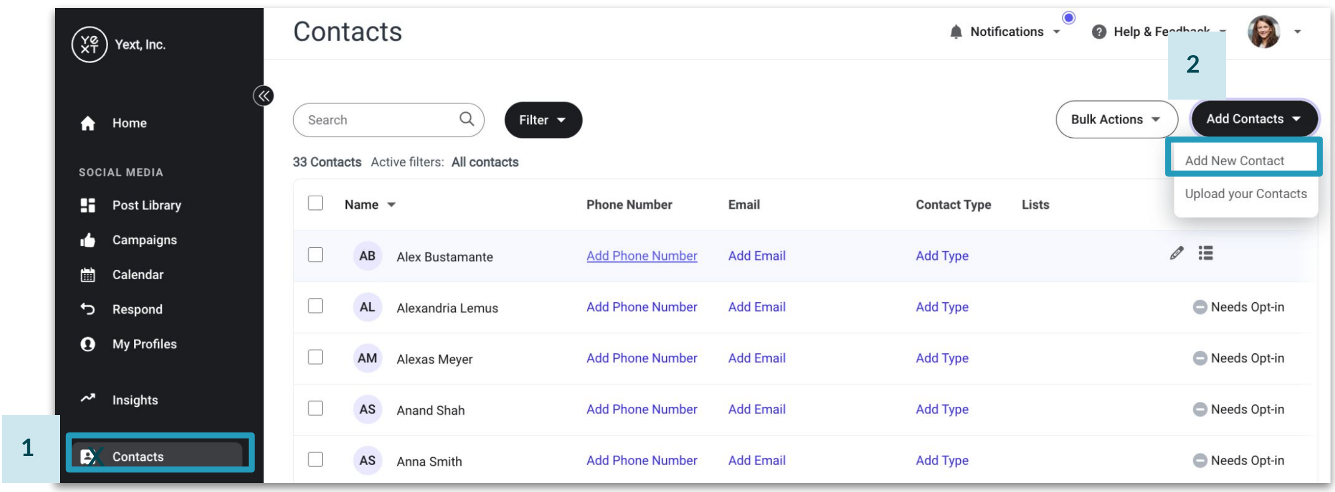
1. Select the **Contacts** tab on the side navigation bar.
2. In the **Search** box, type the name of the person, then click within the box or press enter.
3. Hover over the **Opt-In Status** to show the Action icons and click on the desired action.

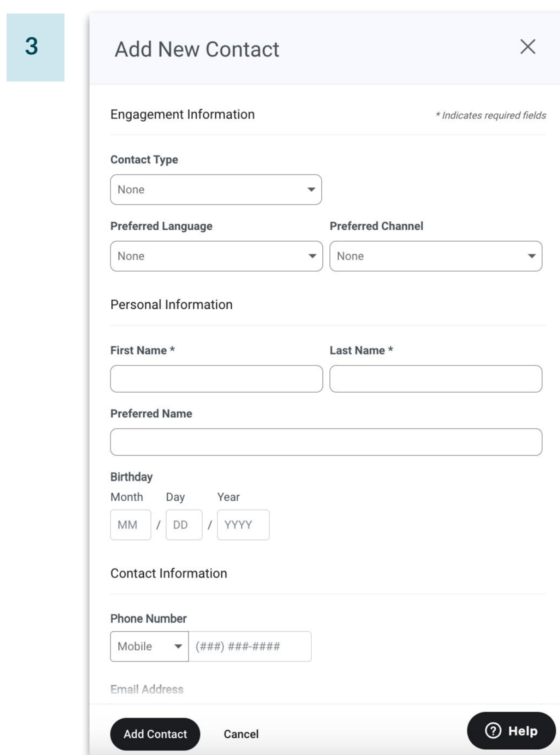


Manage Your Hearsay Contacts

To add a contact, simply follow these steps:

1. Select the **Contacts** tab on the side navigation bar.
2. Click the **Add Contacts** dropdown and choose Add Contact to add an individual contact.
3. A side drawer will open that looks like the image below. Fill out the required fields: First Name, Last Name, and Phone Number. If you'd like, you can fill out the optional fields: Contact Type, Preferred Name, Birthday and Email Address as well. Then click Add Contact.

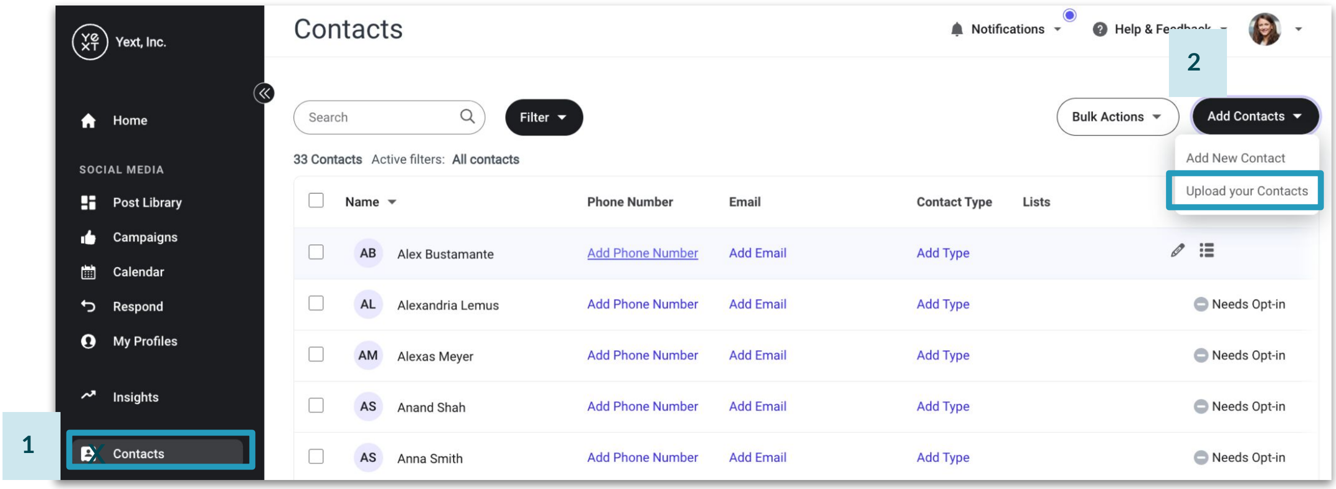




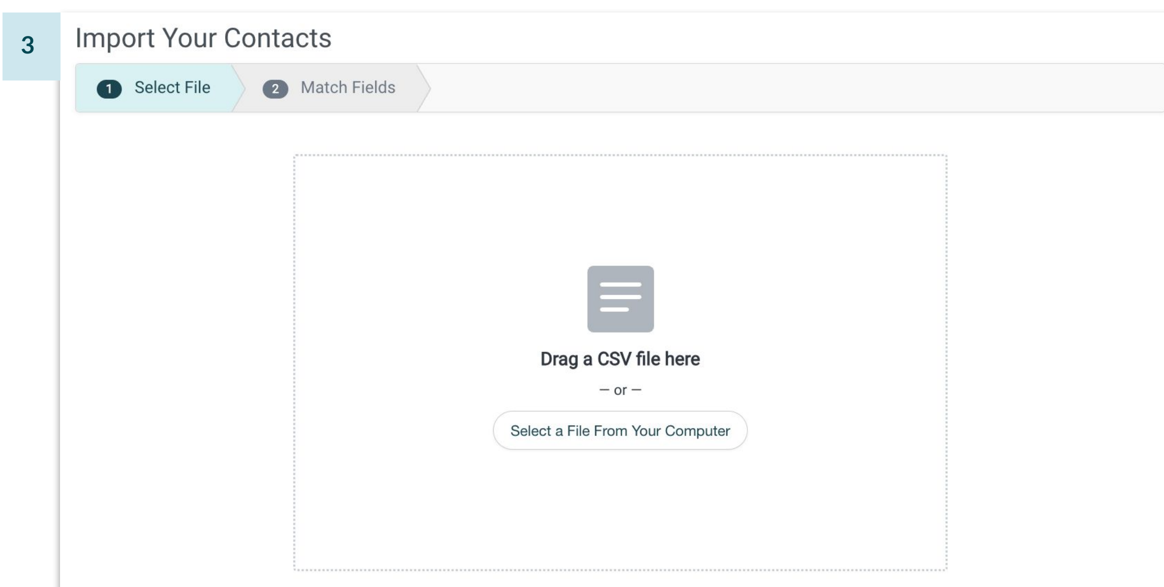
Add Contacts in Bulk

To add contacts in bulk, simply follow these steps:

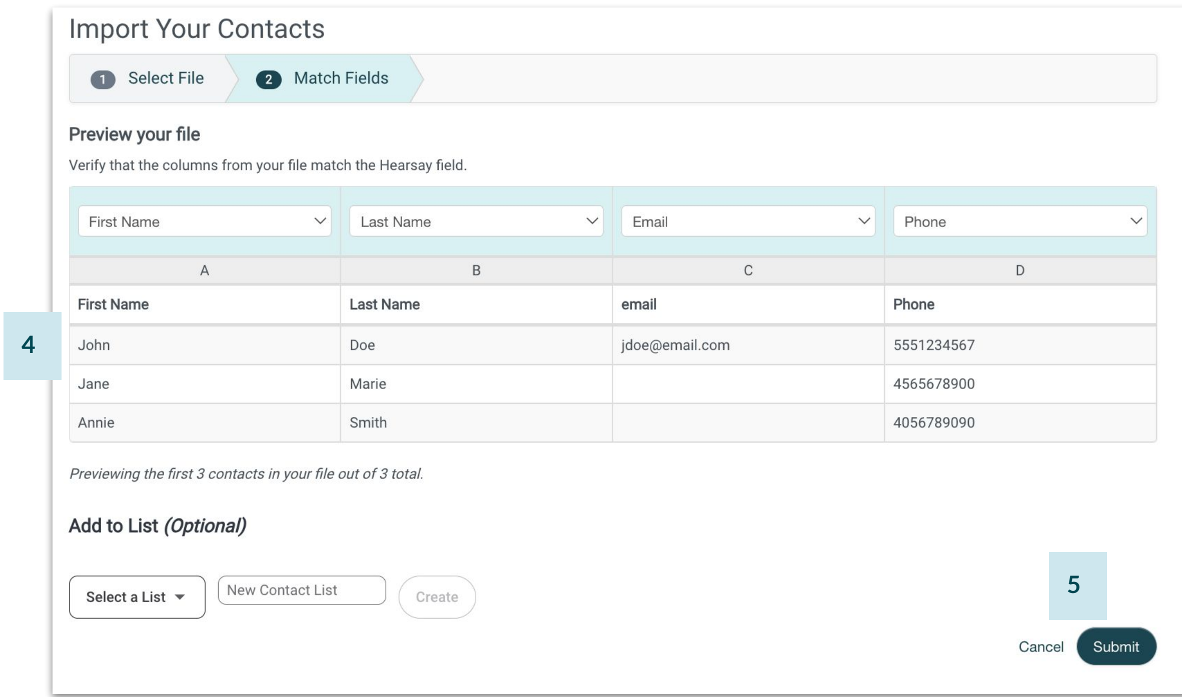
1. Select the **Contacts** tab on the side navigation bar.
2. Click the **Add Contacts** drop down and choose **Upload Your Contacts.**



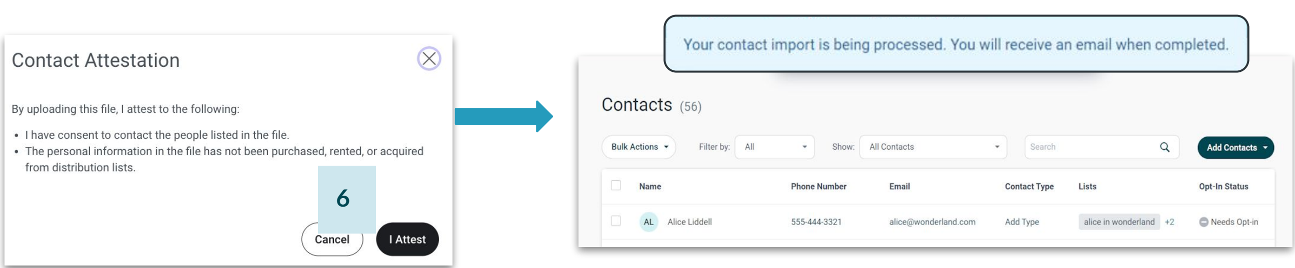
3. Click the **Select File** button or drag and drop your contacts file into the panel to the right.
   This will prompt you to locate a .CSV file on your computer that contains your contact information. The .CSV file must include the following columns: **First Name, Last Name, and Phone Number.**



4. You will be presented with a preview of your .CSV file. Note: This is only a preview, as demonstrated by the text under the table which reads "Previewing the first X contacts in your file out of x total." If needed, you have the ability to toggle the fields by pressing the arrow buttons to reassign the column. The Add to List feature will give you the option to import contacts to a specified list.
5. Once completed, click **Submit** to complete the process.



6. You will be presented with the Contact Attestation popup. If **I Attest** is selected, you will receive the contact import confirmation message.



Note: Per your organization's policy, you may be able to exports contacts from your email account or CRM. If you need assistance exporting your contacts from your email account or CRM, please review our <u>help center article here.</u>