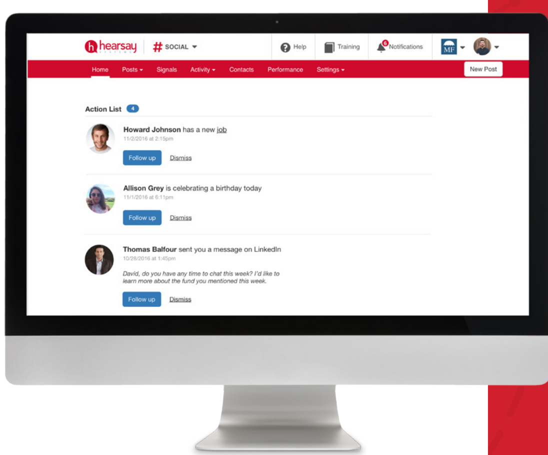
hearsay SYSTEMS

Modernize the advisor-client experience.

Financial services organizations have always invested heavily in their corporate brands to build trust and loyalty. In recent years, this brand investment has expanded by opening up new direct-to-consumer channels like robo-advisors and mobile apps. Out in the field, advisors and agents are challenged to grow business in an increasingly saturated, competitive environment and amid pressure from regulators. The result is a series of broken, disconnected interactions with clients, who expect a streamlined experience – whether it's through a Facebook ad, text message, or email.

Hearsay's Advisor Cloud solutions create the complete client engagement platform for financial services, empowering advisors to use digital to build deeper relationships that accelerate productivity and business growth. The platform enables efficient and compliant communication across digital channels including social networks, text messaging, websites, and email. Its prescriptive technology processes and prioritizes data across systems and suggests what advisors should do next, saving time and eliminating guesswork. For the enterprise, Hearsay unifies client engagement from across the organization, breaking down data silos and providing relationship building and accountability for sales; brand governance and amplification for marketing; efficient supervision and review for compliance; and an open enterprise-ready platform for IT.

CUSTOMERS & PARTNERS:



Automate client engagement to grow business

Hearsay makes building and managing relationships easier and more efficient for advisors by unifying data and providing prescriptive to-do lists. Using natural language processing and machine learning, the platform connects an advisor's digital channels for a unique view of client engagement across social media, websites, and one-to-one channels like texting and email. From the easy-to-use dashboard, advisors see an actionable to-do list with suggested next best actions to take with prospects and clients. Hearsay's smart, personalized Content Library arms advisors with the most relevant recommendations based on their network and level of engagement so advisors can share the right piece of content on the right channel.

Integrate systems for deeper insight

By connecting Hearsay with your Customer Relationship Management (CRM) software, sales and marketing managers see a unified view of corporate and advisor engagement activity. By tracking what's happening in the field, leaders can develop best practices and insights to help recruit millennial advisors and improve advisor performance while retaining experienced advisors.

Tracking client engagement across both corporate and advisor channels gives advisors a more complete view of a prospect or client. With Hearsay, advisors can deliver a consistent experience, whether it's a journey from the corporate website to their local site or a Facebook ad to an event in the community. Hearsay's prescriptive technology gets smarter as advisors and clients take more actions, identifying the best engagement opportunities so advisors can maximize their time online by prioritizing their next best step.

Streamline supervision and compliance

Ensure compliance, reduce risk, and empower your employees to engage with clients. The patented Hearsay platform provides robust compliance functionality across social, mobile, and web communication for regulated companies, including FINRA, SEC, IIROC, MiFID and FCA regulated firms. Make compliance and supervision simple with pre-approval workflows, real-time alerts, supervision and approval trails, and infraction resolution – all managed from a Universal Supervision dashboard. Capture, monitor and archive digital communication between your advisors and their clients, across the corporate network, mobile devices, and remote locations.

FOR MARKETING:

- Content distribution for brand amplification
- Campaign management
- Reporting and analytics
- Insight into field activity

FOR COMPLIANCE:

- Universal Supervision dashboard
- Content pre-approval and post-review
- Lexicon monitoring and alerts
- Seamless archive integration

FOR SALES MANAGERS:

- Visibility of advisor digital activity
- Branch leaderboard
- Insight to accelerate advisor performance and retention