



hearsay advisor cloud[®]

DIGITAL CLIENT COMMUNICATIONS & WORKFLOWS FOR WEALTH MANAGEMENT

The world of wealth management firms and advisors is changing. Direct channels, robo advisors, and mobile apps are significantly impacting the traditional advisor distribution model. Advisors are increasingly challenged to grow business in a saturated, competitive market. And consumers today have high digital expectations; from websites to social networks, text message, and email, they demand a consistent, easy experience.

The Hearsay Advisor Cloud allows your field to provide a seamless customer experience using a complete and compliant digital client engagement platform built specifically for wealth management advisors. The platform enables easy and efficient communication across digital channels – social networks, text messaging, websites, and email – empowering advisors to be high-tech and right-touch. Automated workflows and triggered actions prioritize data across systems and suggest what advisors should do next. Combined, it's a powerful system to accelerate advisor productivity and build deeper relationships that drive business growth.

BENEFITS

- Automate client engagement across channels to increase advisor productivity and business growth.
- Create an AI-powered actionable to-do list, based on a unified view of client engagement and displayed in an easy-to-use dashboard.
- Share the right personalized, de-risked content, on the right channel, at the right time.
- Take advisor productivity to the next level with smart triggers and 1-click (click-to-call or click-to-send) workflows - like RMD reminders or meeting confirmations.
- Maintain the enterprise-class security and controls FINRA, SEC, IIROC, FCA, MiFID II, and CASL regulations require – compliance is built-in.
- Streamline compliance processes with pre-review automation, real-time alerts, approval trails, and infraction resolution – all from the Universal Supervision Dashboard.
- Easily integrate with any CRM, other core enterprise system, and/or advisor website.



HEARSAY SOCIAL

The trusted industry standard loved by over 150,000 advisors, mobile-first with personalized, de-risked content built-in. Advisors can put social media on autopilot with Campaigns and get notified of social engagement to follow up on a more personal level. Pre-written thematic email templates and 1-to-1 outreach workflows specifically designed to start a conversation make it easy.

HEARSAY RELATE

A simple, secure mobile compliant texting and calling solution. Enable BYOD advisors to carry one phone, with two numbers, and engage with clients on today's preferred channel. Cut down advisor workload with features like bulk scheduling and personalization of common text messages and seamlessly sync with your archive and CRM.

HEARSAY SITES

Mobile-optimized, high-conversion advisor websites for an on-brand professional presence that scales quickly. Increase discoverability up to 2.5x and transform advisor sites into a proven sales channel with a higher than 10% visitor conversion rate. Simplify compliance and supervision with a complete view of advisors' website activity through your Universal Supervision Dashboard.

HEARSAY ACTIONS

Click-to-call and click-to-send actions for the moments that matter, like RMD reminders. Turn your advisors' smartphones into smart work systems. Improve outcomes critical to your business through advisor level guidance, automation, and tracking.

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“We are using Hearsay Social and Sites today and we are working with a team on compliant texting too. Advisors need to build awareness, build connections and be relevant and then drive those connections back to the 1-to-1 conversation on a compliant platform. Adoption is high because it's very easy for them to use.”



KAREN SHAKOSKE
HEAD OF MARKETING & CORPORATE COMMUNICATIONS
JANNEY MONTGOMERY SCOTT

To find out how Hearsay Advisor Cloud can help enhance your firm's client-advisor experience:

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ABOUT HEARSAY SYSTEMS

Hearsay Systems offers the Hearsay Advisor Cloud for financial services, empowering advisors to efficiently and compliantly use social media, websites, text and email to engage with customers, build stronger relationships and grow their business. Its prescriptive technology processes and prioritizes data from across digital channels and data systems, providing actionable suggestions for advisors on how they should engage with clients next. Built for the enterprise, Hearsay connects these advisor-client interactions and data to corporate CRM systems and digital marketing programs, and provides efficient compliance supervision and review workflows – all on a secure, enterprise-ready platform.

Hearsay is used by more than 150,000 advisors and agents at the world's largest financial services and insurance firms. The company is headquartered in Silicon Valley with offices throughout North America, Europe and Asia. Connect on Facebook, Twitter, LinkedIn and the Hearsay blog.

