



# Hearsay Lead Actions

CONVERT MORE LEADS WITH TRIGGERED FOLLOW-UP,  
FROM FIRST INTERACTION TO CONVERSION

Companies invest heavily in lead generation, spending millions annually on activities like ads and SEO/SEM. But as agents and advisors tend to current clients, new leads can languish: An average of 4 days elapses before an inbound lead is contacted. By that point, it's too late—the call goes straight to voicemail and they've squandered an opportunity to convert new business.

Using triggered workflows, Hearsay Lead Actions can automatically push a new lead via mobile notification, email or text message in real time. With instant access to relevant background information from your CRM system, a pre-scripted, compliant response can be sent in a single click. Since follow-up can be completed from a mobile device, your reps don't need to return to the office. This kind of instant outreach can lead to a 40% higher conversion rate.

And, because all activity is captured and fed back to core systems, leadership has real-time insight into field activities, such as:

- How quickly leads are being contacted
- What communication channels and content templates are most effective
- Ultimate conversion rates by rep, office, lead type, and channel

Sales leadership can effectively manage leads, accurately measure ROI on lead programs and track all incoming business. And marketing knows their lead generation budget is being spent wisely too.

Every client touchpoint matters, but first impressions set the tone. Ensure an immediate, personal, and consistent first experience for every potential new client with Lead Actions.



Find out how Hearsay can help your advisors and agents. Contact us at:

VISIT [hearsaysystems.com](https://hearsaysystems.com)

EMAIL [contact@hearsaysystems.com](mailto:contact@hearsaysystems.com)

CALL +1 415-692-6230  
+1 888-990-3777

## ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the *human*-client experience in financial services. The Hearsay Client Engagement Platform empowers over 200,000 advisors and agents to authentically and intelligently grow business relationships by proactively guiding and capturing the last mile of digital communications. The world's leading financial firms—including Allstate, New York Life, Morgan Stanley, and Charles Schwab—rely on Hearsay's SaaS platform to scale their reach, optimize sales engagements, and deliver exceptional client service in a consistent and compliant manner. Hearsay is headquartered in San Francisco, with locations throughout North America, Europe and Asia.

Connect on [Facebook](#), [Twitter](#), [LinkedIn](#) and the [Hearsay blog](#).

[hearsaysystems.com](https://hearsaysystems.com)