The Hearsay Salesforce Connector

salesforce

Financial Services companies are increasingly investing in applications like Hearsay Systems and Salesforce to solve critical business challenges across the enterprise

Hearsay's Advisor Cloud solutions help advisors build long-term client relationships – allowing advisors to automatically monitor money-in-motion events (marriage, birth, new house, new job, etc.) and engage with their clients via various channels including social media, text messaging and advisor websites – while maintaining compliance within a complex regulatory environment. Salesforce's Financial Services Cloud enables companies to build and track client profiles, manage the customer lifecycle, track revenue opportunities, and deliver insights on the customer experience that drive customer loyalty.

Because both applications help manage different aspects of the advisor-client relationship, Hearsay and Salesforce have partnered to develop the Hearsay Salesforce Connector, an integration that dramatically accelerates advisor productivity through automation and advisor-specific workflows. This means advisors can focus on building stronger relationships and driving higher-value activities at every stage of their distinctly unique sales funnel.

The Hearsay Salesforce Connector also enables corporate sales and marketing organizations to quickly acquire a deeper understanding of their advisor's client engagement activities. This integration automatically gets data into and out of Salesforce, which increases the value of CRM for both the advisor and for corporate teams. Sales and marketing teams can also leverage this data to:

- Understand the types of client touchpoints that convert into higher-value sales
- Provide advisors prescriptive advice about which clients to engage with, when to engage with them, and how they should engage at scale
- Learn what communications channels are most impactful per client segment

This integration is compatible with the Salesforce Financial Services Cloud as well as Salesforce Sales Cloud, allowing client data to automatically sync from Hearsay to Salesforce as advisors engage with clients and add or update client contact information.

By seamlessly integrating Hearsay data with your Salesforce instance, the Hearsay Salesforce Connector establishes Salesforce as the ultimate system of record for your entire organization.

Enable greater visibility within your organization with deep data integration

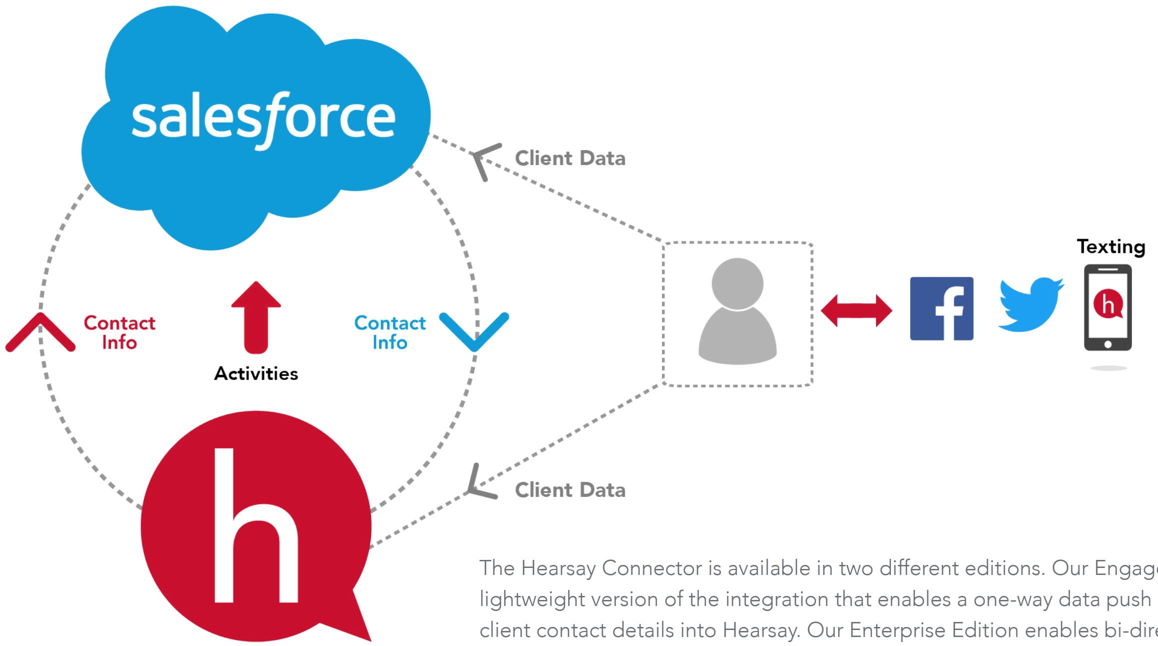
The Hearsay Salesforce Connector ensures that sales and marketing teams can quickly understand what types of advisor activities are having the greatest impact on your business. Your advisors benefit by ensuring they have access to consistent client data across multiple applications. By breaking down data silos, your organization will be able to optimize for specific business outcomes quickly and at scale.

Ensure a holistic view of the Advisor-client relationship

With more visibility into this critical relationship, your sales and marketing teams can be much more prescriptive when sharing best practices to advisors, creating relevant content, and optimizing the client journey for every client segment. Advisors benefit by delivering more personalized, relevant service to their clients, developing deeper relationships across their entire books of business.

Increase advisor effectiveness and productivity

Today, advisors are inundated with administrative tasks. Hearsay's Advisor Cloud solutions help eliminate manual data entry, enabling advisors to spend more time developing relationships and closing business. This improved advisor experience ensures greater utilization of Salesforce while benefitting from Hearsay's industry-leading functionality.



The Hearsay Connector is available in two different editions. Our Engage Edition is a lightweight version of the integration that enables a one-way data push of your Salesforce client contact details into Hearsay. Our Enterprise Edition enables bi-directional contact synchronization, automatically populates Hearsay activities into Salesforce.

About Hearsay Systems

Hearsay Systems offers leading Advisor Cloud solutions for financial services, empowering advisors to efficiently and compliantly use social media, websites, and texting to engage with customers, build stronger relationships and grow their business. 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.

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