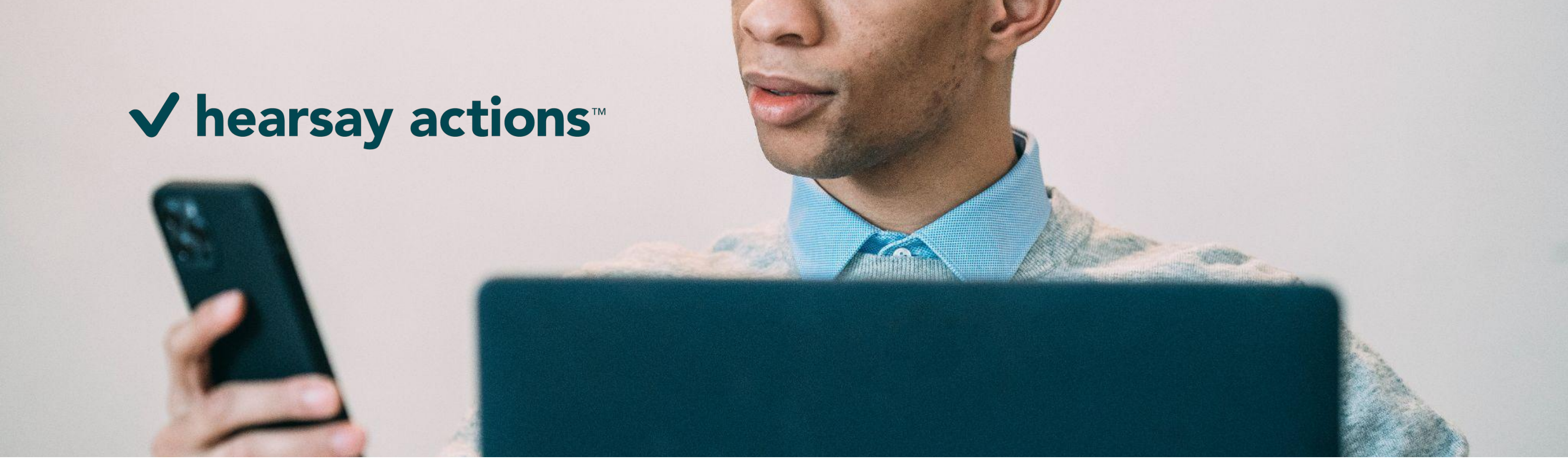


✓ hearsay actions™

Automate advisor-client engagement with compliant workflows

DELIVER AUTHENTIC 1:1 EXPERIENCES DESIGNED TO NURTURE AND CONVERT PROSPECTS AND STRENGTHEN CLIENT RELATIONSHIPS

In financial services, it's client engagement in the moments that matter that builds long-term customer relationships.

Hearsay Actions layers turnkey workflows on top of compliant communication channels to ensure immediate and consistent experiences for every client. Smart triggers and one-click workflows empower your field team to deliver timely, personalized messaging at scale to increase conversion and improve advisor productivity and client satisfaction.

INCREASE LEAD CONVERSION

Companies invest heavily in lead generation, spending millions annually on activities like ads and SEO/SEM. But if leads languish in voicemail or an inbox, a conversion opportunity may be squandered.

Using triggered workflows, Actions can automatically notify a new lead via mobile notification, email or text message in real time. With instant access to relevant background information from your CRM, a pre-scripted, compliant response can be sent in a single tap.

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 has been shown to increase conversion by as much as 37%.

Hearsay Actions orchestrates consistent, authentic engagement to deliver a better client experience

USE CASES

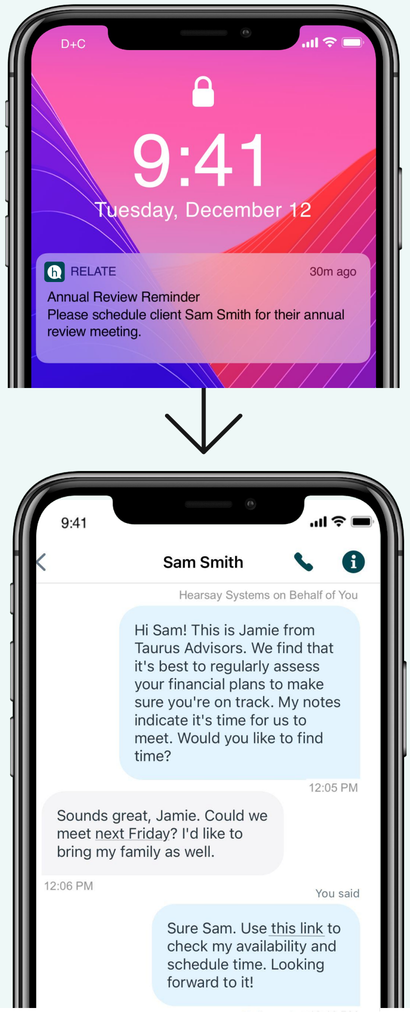
- **Lead outreach:** convert more leads with triggered follow-up, from first interaction to conversion
- **Recurring reviews**: streamline the client review process to deepen the relationship and identify areas for growth
- **Strategic life events**: surface opportunities by engaging at key moments
- **Investment events:** grow share of wallet by building awareness of opportunities based on portfolio, products and market movements
- **Billing events**: increase retention through personalized, timely outreach around billing events

A top 10 U.S insurance company found timely engagement via Actions produced ***a 37% increase in lead conversion.***

BOOST CLIENT SATISFACTION AND RETENTION

Actions harnesses data triggers to deliver automatic, personalized engagement around critical client servicing events. By leveraging preferred client channels like text messaging and voice, Actions enables your field to engage customers in a way that boosts satisfaction while delivering business value.

Critically, Actions keeps field representatives in the loop via mobile notifications, ensuring they have complete transparency and context to follow up and continue the conversation. From an enterprise perspective, this rich engagement activity is captured and automatically fed back to core systems like CRM. 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 wisely spent.



40%

Nearly half of financial advisors wish they could communicate more often with clients

Source: Hartford Funds

64%

of clients say their advisor contacts them “infrequently” or “very infrequently”.

Source: YCharts

30%

of insurers only engage with customers at point of sale, renewal or claim.

Source: Campaign Monitor

The Big Opportunity

Every action matters. Hearsay Actions automates 1:1 outreach to strengthen retention and drive growth.

To find out how Hearsay can help your advisors and agents, contact us at:

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