



## Make Your Client Data Actionable at Every Stage with Hearsay's CRM Contact & Activity Connector

Hearsay's CRM Contact & Activity Connector unlocks the ability to automatically capture the critical 'last mile' of advisor-client engagement data and provides a unified source of truth for the entire customer journey.



### Make CRM Contacts Available in Hearsay Relate

Seamlessly deliver CRM contacts into Hearsay Relate for every user and ensure that records stay up-to-date across systems with support for two-way or one-way sync.



### Orchestrate Intelligent Follow-Up Workflows

Quickly convert Hearsay website or CRM leads with follow-up workflows on field rep text message or click-to-call mobile notifications



### Gain 'Last-Mile' Visibility into Client Activities

Automatically sync Hearsay 'last-mile' client engagement activity on SMS and mobile calling to CRM records to ensure full visibility into across channels.



### Drive Insights and Analytics

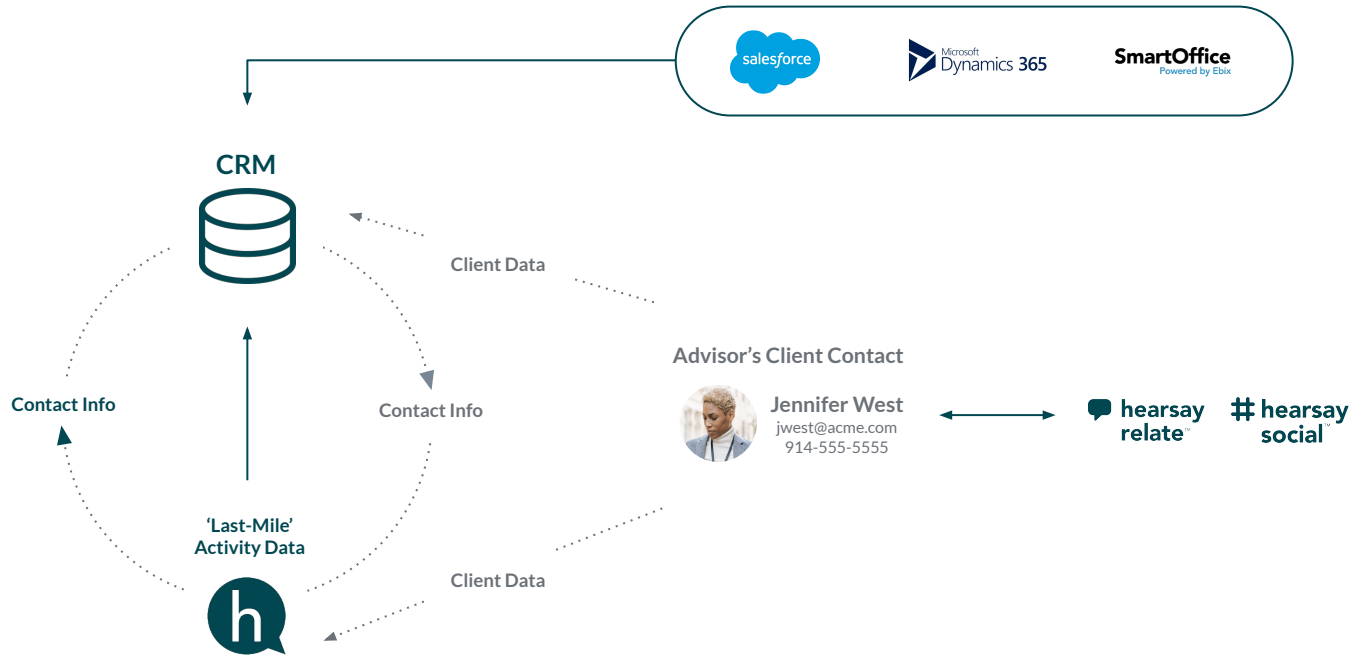
Enrich existing CRM insights with Hearsay client engagement activity, making your AI and reporting even more powerful

### CREATE A UNIFIED SOURCE OF TRUTH ACROSS THE CLIENT JOURNEY

- Save your field reps' time with automated contact and activity sync, pushing 'last-mile' data into CRM on their behalf
- Measure field productivity and uncover best practices by observing client interactions across SMS and mobile calling
- Turn your CRM into a unified source of truth by capturing the elusive 'last-mile' of the client journey
- Trigger personalized text messages and mobile calls to optimize field rep results

Proven results with leading CRM platforms and homegrown systems





## Hearsay's CRM Contact Connector ensures a unified contact record exists across systems

- Accelerate Hearsay Relate program adoption with a pre-filled contact book
- Save advisors time by eliminating double data entry with automated contact sync
- Leverage one-way last contact sync to ensure CRM remains the ultimate source of truth for contact details
- Leverage two-way contact sync to capture local advisor contacts back to CRM
- **Contact data fields available include:**  
*First Name, Last Name, Phone, Email, Birthdate*

## Hearsay's CRM Activity Connector delivers last-mile visibility into SMS and mobile calling activity between advisors and clients

- Automatically log client engagement activity, including call metadata, SMS conversations, and social media activity to corporate CRM records
- Leverage engagement data to create new 'last-mile' CRM dashboards and reports for cross-functional teams
- Save advisors hours of manual data entry each week by auto-logging their client calls and SMS conversations to CRM records
- Activity data fields available include:  
Text Messages Sent & Received, Voice Calls Made, Social Engagement Activity (Facebook and Twitter), and *Hearsay Sites Activity (Contact Lead Form Submissions and Event RSVPs)*

To learn more about any of our Enterprise integrations contact your Hearsay customer success representative. Our Professional Services team is available to discuss and design a solution that fits your firm's needs.

### ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the human-client experience in financial services. The Hearsay Client Engagement Platform empowers over 200,000 advisers 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, optimise sales engagements, and deliver exceptional client service in a consistent and compliant manner. Hearsay is headquartered in San Francisco, with globally distributed teams throughout North America, Europe and Asia.

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