

Hearsay for Salesforce

Facilitate more personal client engagement and greater productivity, while enriching your CRM

Financial services professionals must engage with clients and prospects on modern channels—including social media and text messaging—while adhering to required regulatory standards. Connecting Hearsay to Salesforce bridges the gap between corporate data and field activities, creating a complete end-to-end view of the client journey while optimizing business outcomes across teams and digital channels.

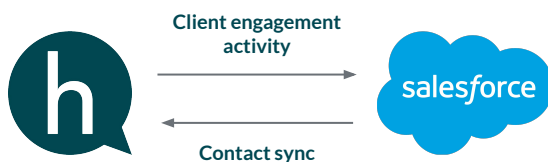
SYNC FIELD DATA WITH HEARSAY'S CONTACT AND ACTIVITY CONNECTORS

HOW IT WORKS

Automatically sync Hearsay client contact information with last-mile text (SMS) and mobile calling activity.

HOW IT HELPS

- Keep client contact information current and ready for follow-up
- Gain deeper visibility into advisor-client touchpoints
- Enrich CRM to power insights from Einstein and Tableau
- Measure field productivity and uncover best practices



Seamlessly connect Hearsay with your Salesforce instance

SYNCS WITH

Sales Cloud, Service Cloud, Financial Services Cloud, Marketing Cloud

BENEFITS

- Empower agents and advisors to engage with clients on social media, and via text messaging, while adhering to regulatory standards
- Use embedded compliant texting capabilities and configurable workflows to boost productivity and streamline processes
- Enrich Salesforce with robust 'last mile' client data
- Eliminate manual data entry and let your field team focus on servicing clients
- Increase CRM adoption

DRIVE EFFICIENCY WITH EMBEDDED RELATE

HOW IT WORKS

Embed Hearsay's compliant texting capabilities across Salesforce to drive productivity and more impactful outreach.

HOW IT HELPS

- Reduce manual work with automatic contact creation
- Respond to clients faster with real-time message alerts
- Enjoy intelligent, automated prospect and customer outreach
- Reduce time spent on client service tasks from days to minutes
- View relationship context while texting clients in Salesforce
- Add calls and SMS triggers to lightning flows, tasks, action plans, and journeys

“Hearsay’s last-mile customer engagement platform is a natural addition to our Salesforce applications. With a growing set of regulations introduced across industries, firms need to ensure that their sales, service, and marketing teams follow compliant communications with customers. With Hearsay, we are excited to deliver these enhanced capabilities to Salesforce customers.”

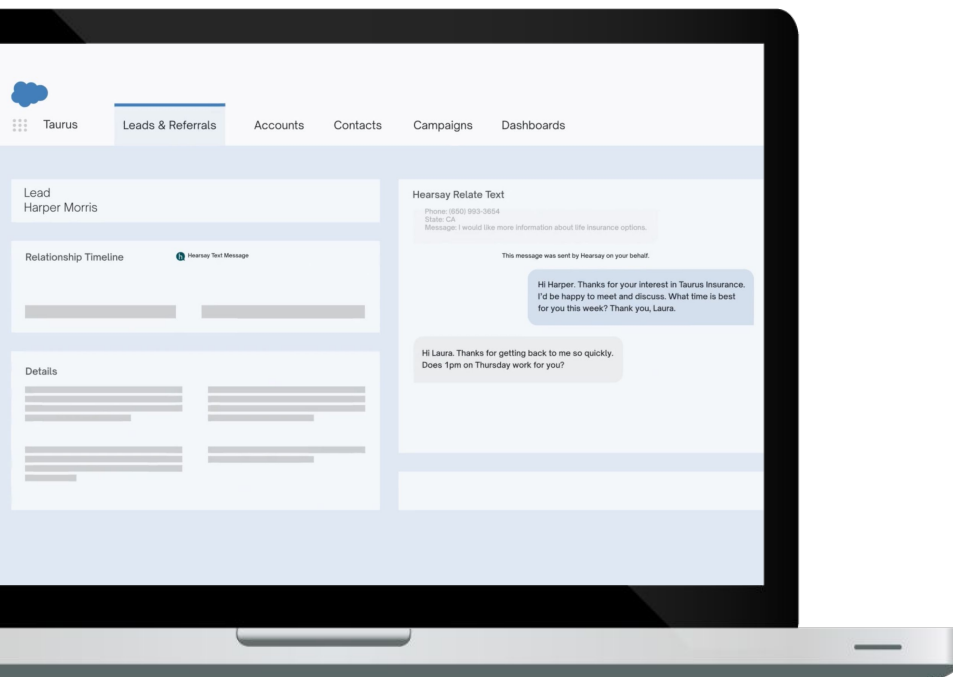


Bill Patterson
EVP of CRM Applications
Salesforce

BETTER CUSTOMER EXPERIENCES

“Fidelity leverages Hearsay's platform to enhance our customer focus by simplifying text messaging, which will integrate with our Salesforce CRM. Digitally-driven capabilities like these give our advisors more time to spend on what’s most important, serving their clients.”

David Dintenfass, CMO at Fidelity



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

VISIT hearsaysystems.com

EMAIL contact@hearsaysystems.com

CALL +1 844-556-4396

CONNECT [Facebook](#), [Twitter](#), [LinkedIn](#) and the [Hearsay blog](#)

