

# # hearsay social™

# hearsay social™ Yesterday

Dynamic Campaigns: Your post was just successfully shared

# hearsay social™ Now

Your LinkedIn post has 2 comments. Reply to them now.

## The leading social selling solution, built for financial services

More than 225,000 financial services professionals at the world's most successful firms rely on Hearsay Social to attract prospects, retain clients, and grow their business.

We make it easy to nurture clients and prospects with personalized content—and to connect 1-to-1 in the moments that matter.

As the only platform designed to support the *entire* social selling journey, Hearsay Social is purpose-built to:

- Demonstrate *individual* personality and specialization
- Build credibility through profiles, content, and messaging
- Activate and encourage 1-to-1 engagement
- Deploy at scale, with programs in the tens of thousands

Built for the enterprise, Hearsay Social includes robust compliance and supervision functionality, seamless integration with critical applications like CRM, and data and analytics to demonstrate program ROI.

### BENEFITS

- Expand corporate marketing reach and brand governance
- Help field teams drive new business and build client loyalty
- Mitigate risk with AI-powered compliance and supervision
- Achieve rapid time to value with quick implementation, deployment, and onboarding
- Integrate with core enterprise systems: CRM, archive, & more

### INDUSTRIES SERVED

- Asset management
- Banking
- Life insurance
- P&C insurance
- Wealth management



# 79%

Of US-based millennials and Gen Z'ers have gotten financial advice from social media

Source: *Forbes Advisor*

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

## MAXIMIZE CLIENT ENGAGEMENT

- Engage clients and prospects more effectively across Facebook, LinkedIn, Instagram, and Twitter
- Use campaigns to enable your field team to automatically post approved content to social channels
- Fuel agent and advisor success with personalized content recommendations, curated to engage target clients

## ENCOURAGE AUTHENTICITY

- Simplify social by providing your field team with publishing tools that make it easy to create compliant original and modified content
- Use AI-powered 'Netflix-style' recommendations to deliver user-specific curated content
- Embrace modern mediums like video with confidence, using Hearsay's AI-powered pre-review capabilities
- Streamline agent and advisor profile updates with leading profile management tools

**"Being on social has helped our agents strengthen and build relationships. Clients don't want an anonymous person on the other end of the phone. Hearsay Social allows them to learn about agents as real people, not just a brand. It builds trust."**



Katie Piretti  
AVP of Client Experience  
American National

## STREAMLINE AND SIMPLIFY COMPLIANCE

- Efficiently capture, monitor, and archive all your agent and advisor's social activities
- Rest easy with built-in compliance for FINRA, SEC, IIROC, FCA, and MiFID II-regulated firms
- Leverage time-saving pre-approval workflows, real-time alerts, supervision and approval trails, and infraction resolution

## UTILIZE INTEGRATIONS TO MULTIPLY VALUE

- Add critical synergistic sales channels—like sites and compliant text messaging—to customize your all-in-one engagement hub and supercharge outreach
- Seamlessly integrate with other systems (including CRM) to unify data, drive efficiency, and increase conversion across your business
- Rely on AI to effortlessly curate top-performing content and add it to your post library with [Content+](#)

## PARTNER FOR SUCCESS

Delivering a successful field marketing program requires technology and process adoption, regular engagement, and a strong support team with experience in serving high-volume growing organizations.

Hearsay's **Client Services** team helps accelerate your program's time to value, while our **value consultants** help you incorporate best practices and optimize ROI.

[Learn more](#)

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

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