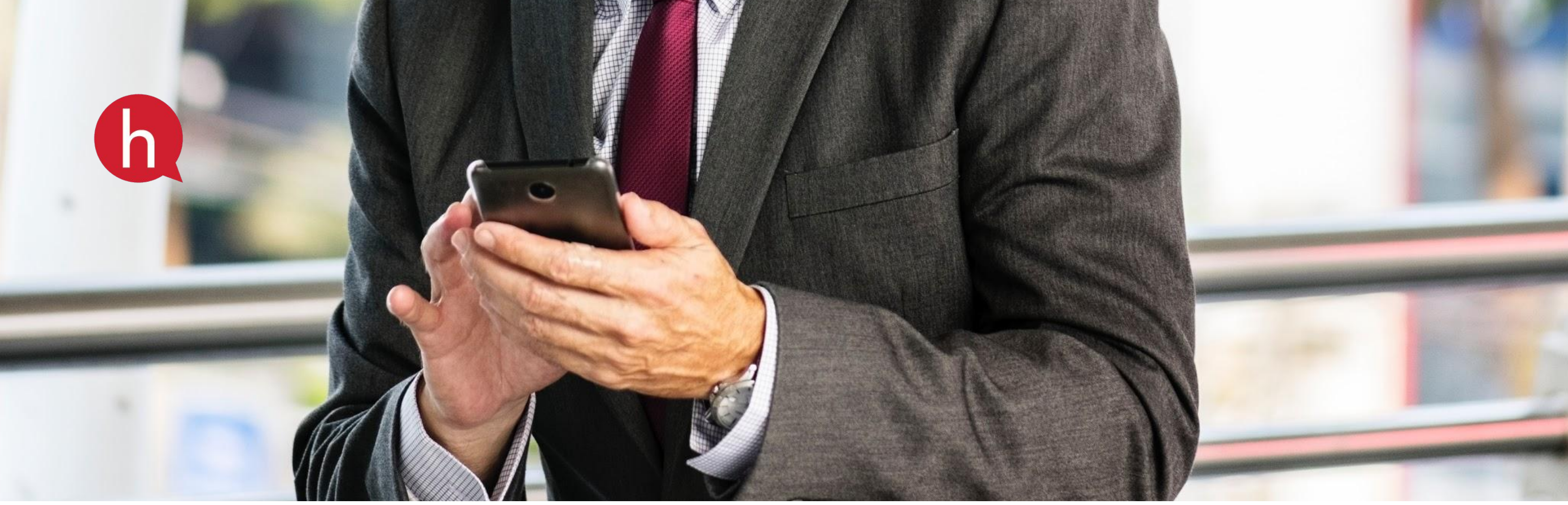
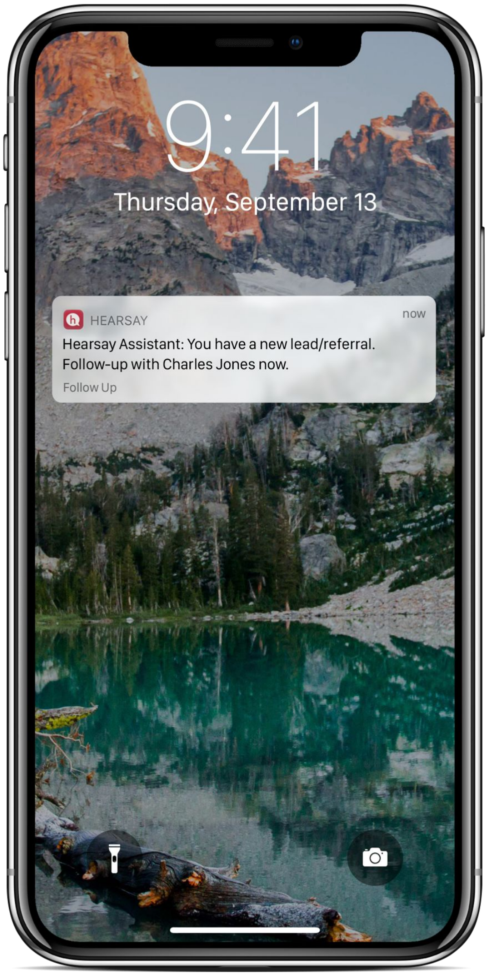


Advisor Actions Lead Follow-up

CONVERT MORE LEADS WITH TRIGGERED LEAD FOLLOW-UP BUILT FOR WEALTH ADVISORS

Wealth management companies invest heavily in lead generation, spending millions annually on activities like ads and SEO/SEM. But opportunity can quickly turn into a challenge when leads don't get the rapid response required to convert them into new business.

As advisors are out and about tending to their current clients and meeting with new ones, new leads can languish: an average of 4 days elapses before an advisor connects with an inbound lead. By that point, it's too late - their call goes straight to voicemail just like 96% of cold calls.



Using triggered workflows, Hearsay's Advisor Actions can automatically push a new lead via mobile notification, email or text message in real-time. The advisor has instant access to relevant background information from your CRM system and pre-scripted outreach engages leads quickly and effectively with just a single click. Since an advisor can follow-up from their mobile device and doesn't need to return to the office, outreach can happen within the 3-hour window that leads to a 40% higher conversion rate.

And, because all activity is captured and fed back to core systems, leadership has real-time insight into field activities. Now they can know:

- How quickly advisors are following up on leads
- What communication channels and content templates are most effective
- And ultimate conversion rates by agent, office, lead type, and distribution channel

Heads of sales have instant access to everything happening in the field to manage leads, can accurately measure the return on lead programs and can track all that business coming in. And marketing knows their lead generation budget is being spent wisely too.

To improve your lead follow-up process and conversion rate today, contact us at:

VISIT hearsaysystems.com

EMAIL contact@hearsaysystems.com

CALL +1 415-692-6230
+1 888-990-3777

ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the client experience in Wealth Management, Insurance and P&C with compliant digital communications and workflow solutions. Over 150,000 advisors and agents at the world's largest financial services and insurance firms leverage Hearsay to engage with customers and build stronger relationships to grow their business.

With Hearsay Cloud for financial services, advisors and agents provide real-time, personalized and seamless client experiences across the right channel - social, texting and mobile - at the right moment. Automated, pre-built industry workflows for insurance and wealth management provide one-click actionable suggestions for targeted engagement. Built for the enterprise, Hearsay Systems connects data and every client interaction to corporate CRM systems and digital marketing programs – all on a secure, compliant enterprise-ready platform.

Hearsay is headquartered in Silicon Valley with locations throughout North America, Europe and Asia. Connect on Facebook, Twitter, LinkedIn and the Hearsay blog.