

Day 2 | Wednesday, April 22, 2020

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Building Human Connection with Last-Mile Content

4.22.2020

Clara Shih
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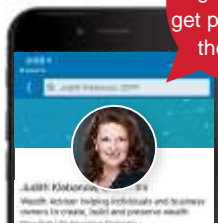
Medium

Messenger

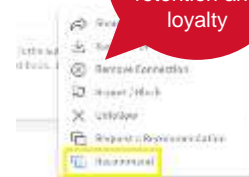
Message

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Goal: Help More Clients Through their Journey, Minimizing Friction and Maximizing Connection



Authentic engagement to get prospect on the phone



Continuously engage clients to boost retention and loyalty

1.

Lead / referral

Typically comes from existing client, social media, or search.

Social Signal Search

2. NEW

Digital validation & education

Prospect Googles advisor to validate experience, credibility, location.

Social Profile Advisor Website

3.

First call

Very hard to get prospects on the phone. Advisors must earn the right.

Advisor SMS Phone Call

4. NEW

Digital nurture

Content nurturing via email and social.

Connect on Social 1-1 Email

5.

Nudge and close

Combination of offline and digital nudges to close business.

Advisor SMS Phone Call

6.

Ongoing care, service & upsell

Engagement to retain and deepen relationship.

Social Posts Advisor SMS

7.

Advocacy & referrals

Happy clients offer reviews*, testimonials, and intros.

Social DM Advisor SMS

Medium

"Omnichannel" because this
gives customers choice
-brooke forbes
cio fidelity

Messenger

Message

Medium

Messenger

Advisors need to be an
"approachable authority"

-naveen agarwal
cmo prudential

Message

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Content Performance by Industry

Q2 2020 Social Selling Content Study

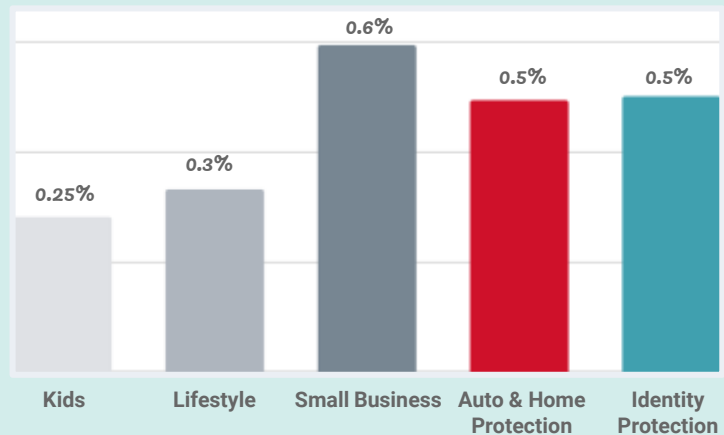
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Average Engagement Rates



Wealth Management

Average Engagement Rates



P&C Insurance



How to Navigate the Suspension of Student
wsl.com

My Oversubscribed Life

A journey to the tipping point of life optimization.

#PHILACADEMY

Esquire



WSJ.COM

A New IRA Donation Strategy Now Can Increase Your Tax Savings Later

How to Fix a Sedentary Lifestyle (Because It's Never Too Late to Get Moving)

There are simple solutions you can follow to stay healthy.

BY STEPHAN LEBRON, MS, RD, CDE, CNS



How to Help in the Coronavirus Crisis—and Why You'll Be Glad You Did.

wsl.com



The Pandemic Work Diary of a Video-Streaming C.E.O.

nytimes.com

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NEW

3rd-party Content Curation

Most Popular Channels

- Healthy Living
- Technology News
- Millennials & Money
- Economy & Investing
- *Create your own – Ask your CSM*

Most Popular Sources

WSJ Wall Street Journal World News
Technology

GH Good Housekeeping
Tech news

CDC COVID-19 Health and Wellness
Archive



Social Admin
 Discover, Curate, & Create Campaigns, Targeting, Tags
 - Posts & Links
 - Photos
 - Videos



Advisor/Agent
 Set Cadence, Interests, & Journeys

Last-Mile Content Management

Brand Content

3rd-party Content



any DAM

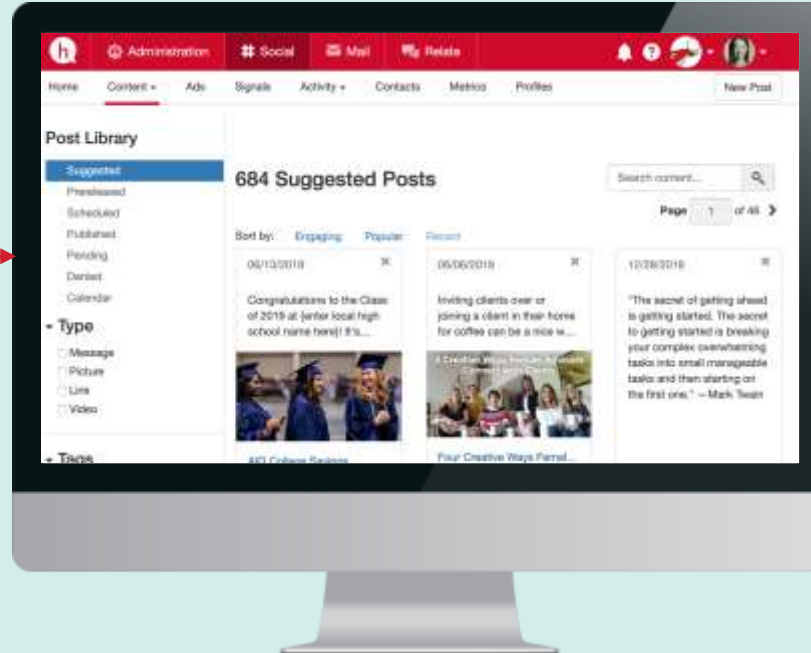


any source

Best of Your Field's Posts

Automated Ingestion

RSS / API



Marketing posts on behalf of

AI Matching

Auto-sorted

Guided Personalization

Custom

Dynamic Campaigns

Personalized Suggestions

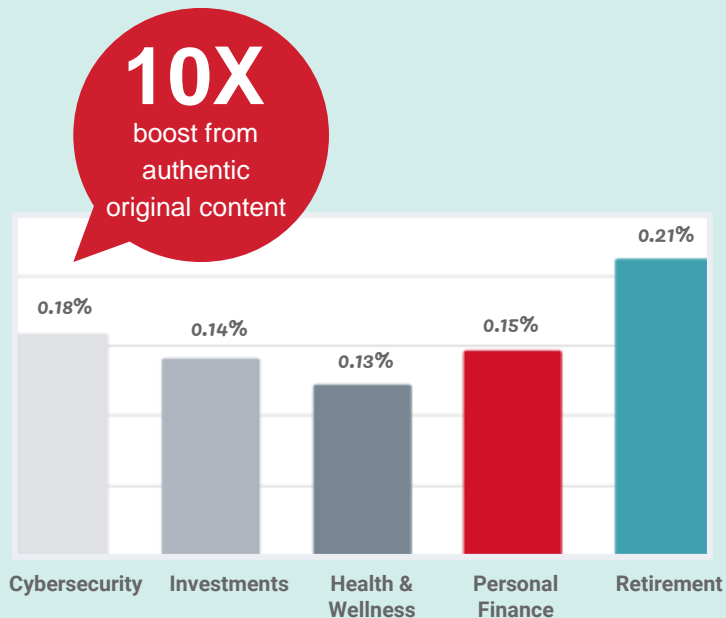
Personalized Library

"Mad Libs"

Advisor-Composed

Measurement Considerations

- Reach vs. Engagements vs. Clicks
- It's a recipe, not one ingredient
- Trade-off authenticity vs. adoption



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Josh Feyen
@joshuafeyen
American Family

"Not all agents and advisors will be at the same level of mastery with social selling and digital. We developed a maturity model- crawl, walk, run, soar."

Social Click Performance

Social Post and Campaign UTMs

50% lower bounce rate

3X more page views and time on site per visit

\$M value of traffic driven from organic social

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Source / Medium

- hearsay_campaign/covid19
- google/organic

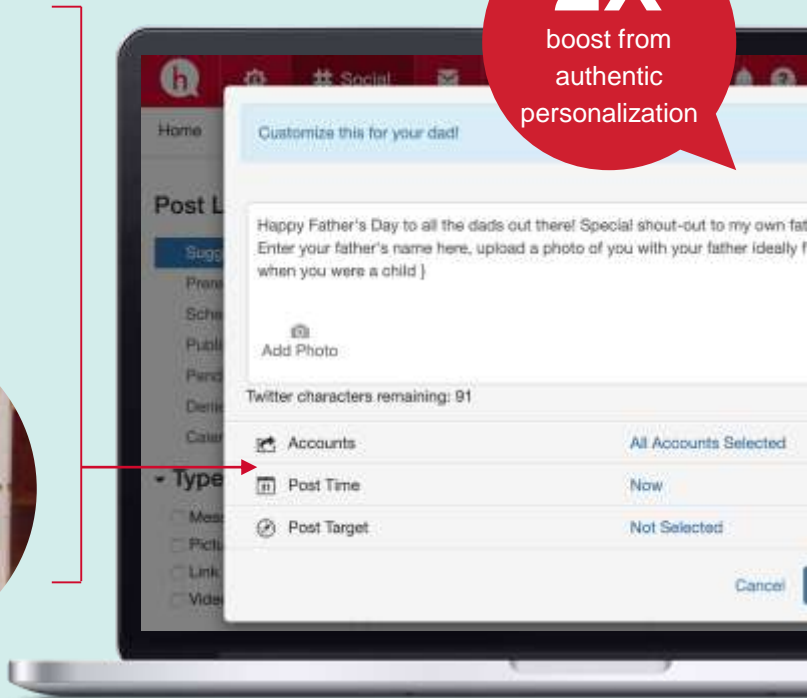
† Hearsay Content Study, 2020; 173K agents and advisors, 23M engagements

Guided Social Personalization

Mad Libs (Modification Required)



2X
boost from authentic personalization

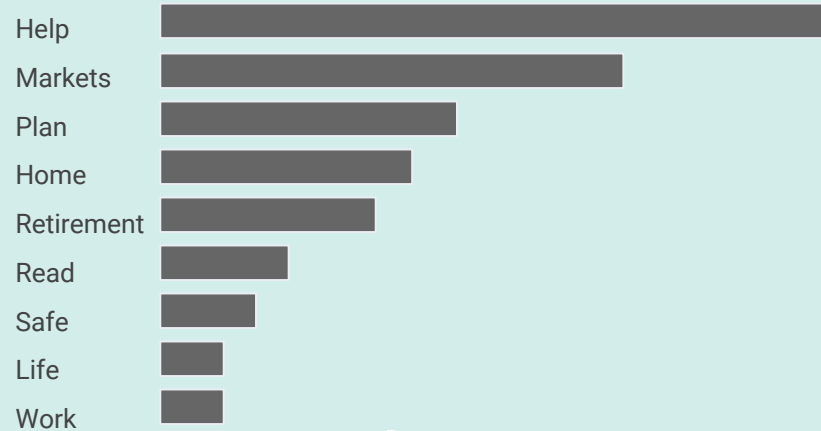


Client Text Message Themes

 hearsay relate™



Top Keywords & Sentiments, March 2020



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Brad Auerbach
Head of Industry

FACEBOOK

How Facebook,
Instagram, and WhatsApp
Are **Helping the World**
Stay Connected in
Extraordinary Times

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Staying
informed

Staying
positive

Staying
occupied

Staying
healthy

FACEBOOK

In Italy, we've seen...

+70% increase in time spent across our apps

—

2X increase in Instagram and Facebook views in a week

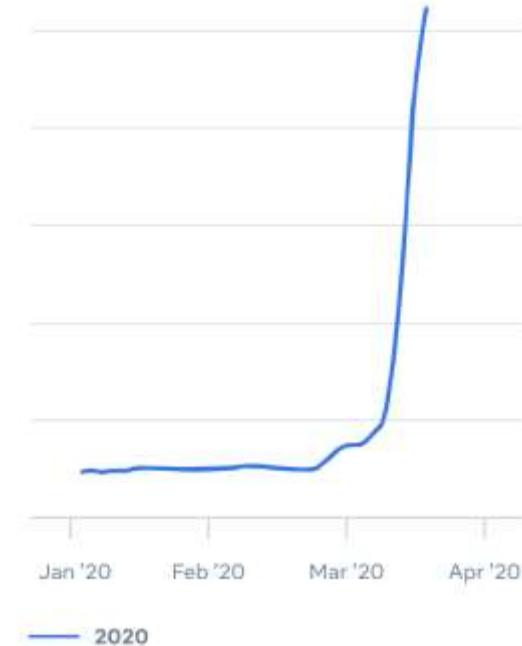
—

+50% increase in messaging

—

>1,000% increase in group calling time*

Group Call Time (minutes) in Italy





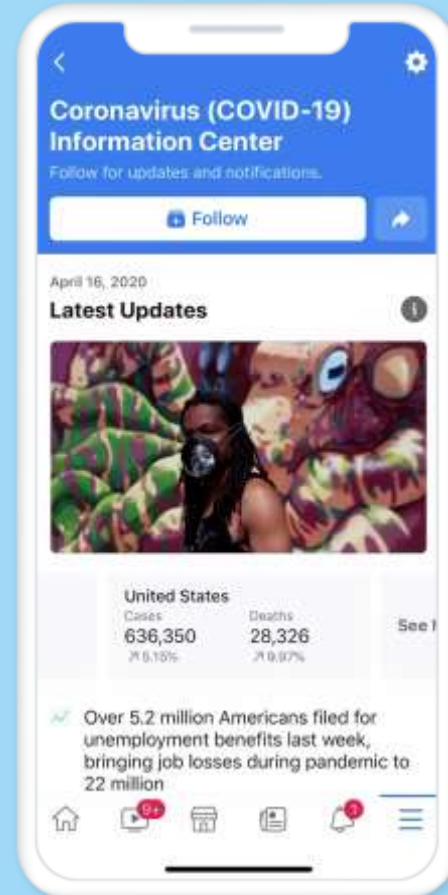
Steps Facebook is taking to respond to the coronavirus (COVID-19)

Helping to ensure that everyone has access to accurate information and removing harmful content

Supporting health and economic relief efforts

Helping to keep people connected

FACEBOOK



@clarashih
#hearsaysummit2020

Thank you

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