



hearsay
SUMMIT
Transforming data into action
APRIL 30 – MAY 01 2019

Get Recognized and Increase your Value with Hearsay Certification

At this year's Hearsay Summit, you have the opportunity to become one of the first marketing or compliance professionals certified on Hearsay! Increase your value and industry credibility with proven competence in managing the most widely-used digital engagement social media platforms by enterprise financial services and insurance firms. By taking one of these admin certification programs, you will scale your abilities and get the most out of the Hearsay Social platform.

You'll learn to automate complex business processes, create reports & dashboards, and train advisors/agents on using Hearsay *and* demonstrate your ability to lead advisor and agent digital transformation. Hearsay Social Admin Certification will give you the tools to help your team stay efficient and on point while assisting them in monitoring their customer relationships and ever-increasing successes.

GET CERTIFIED AT SUMMIT

Hearsay Admin Certification will formally launch in Fall 2019. We're running the pilot program at Summit with some significant benefits.

NOTE: Space for certification at Summit is capped and will fill up quickly! Secure your spot today.

Compliance and Marketing Certification Run Concurrently at Summit

| | Hearsay Social Admin Certification at Summit | Program Launch (Fall 2019) |
|--------|--|---|
| Who: | <ul style="list-style-type: none"> Compliance Professionals Marketing Professionals with 3 years of Hearsay Experience | <ul style="list-style-type: none"> Compliance Professionals Marketing Professionals - 3 Levels (Beginner, Intermediate, Advanced) |
| What: | <ul style="list-style-type: none"> 1.5 hours of instruction Certification exam Provide feedback on the content and exam questions | <ul style="list-style-type: none"> 4 hours of instruction Certification exam(s) |
| Price: | Free with Hearsay Summit admission | \$1,000 |

CERTIFICATION GOALS AND CONTENT

Each certification program will address the following themes:

- The state of the industry, including current trends and how they influence your Hearsay program
- How to define role relationships between marketing, sales and supervision so it's clear who needs to focus on which tasks (e.g. who owns demand gen vs lower funnel conversion; best practices for compliance policy and legal)
- The four pillars of the Hearsay framework and how each helps you to optimize your social program
- The ROI of social media and how to sell your program to internal stakeholders
- Helping change-averse advisors and agents leverage digital channels to promote their businesses

SAMPLE TOPICS COVERED FOR MARKETING ADMINS:

- Building and maintaining a robust social media library
- Dynamic Campaigns and automated content
- DIFY Campaigns and Hearsay Content
- Social profiles best practices
- Special/underutilized features
- Leveraging Insights and key reports

SAMPLE TOPICS COVERED FOR COMPLIANCE ADMINS:

- Building custom dashboards and compliance queues
- Saved searches and sampling
- Suggested profiles and best practices for managing approval requests
- Reviewing configurable compliance settings
- Special/underutilized features
- Leveraging Insights and key reports

For more questions about the program, please contact your Customer Success Manager.

ABOUT HEARSAY SYSTEMS

Hearsay Systems offers the Hearsay Advisor Cloud for financial services, empowering advisors to efficiently and compliantly use social media, websites, text and email to engage with customers, build stronger relationships and grow their business. Its prescriptive technology processes and prioritizes data from across digital channels and data systems, providing actionable suggestions for advisors on how they should engage with clients next. Built for the enterprise, Hearsay connects these advisor-client interactions and data to corporate CRM systems and digital marketing programs, and provides efficient compliance supervision and review workflows – all on a secure, enterprise-ready platform.

Hearsay is used by more than 150,000 advisors and agents at the world's largest financial services and insurance firms. The company is headquartered in Silicon Valley with offices throughout North America, Europe and Asia. Connect on Facebook, Twitter, LinkedIn and the Hearsay blog.

