

## Power the Last Mile

Facilitate more personal client engagement with one-to-one compliant communications that automatically sync with your instance of Salesforce, including Sales Cloud, Service Cloud, Financial Services Cloud, and Marketing Cloud.

Advisors and agents must engage with clients and prospects on modern channels like social media, text messaging, and mobile calling while adhering to required regulatory standards. Connecting Hearsay to Salesforce bridges the gaps 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.

**Hearsay offers seamless options to connect your instance of Salesforce.**

1

Automatically sync with Salesforce via **Hearsay's Connectors**

Automatically sync Hearsay client contact information with last-mile text (SMS) and mobile calling activity within Salesforce, to ensure unified contact records are up-to-date with full visibility across channels.

Measure field productivity and uncover best practices by integrating Hearsay client engagement activity, enriching CRM insights to make Einstein analytics and reporting even more powerful.

2

Integrate "last-mile" engagement channels (text, mobile calls) with **Hearsay for Salesforce**

Integrate Hearsay's compliant text and mobile calling solution into workflows—Lightning Flows, Tasks, Action Plans and Journeys—to enable intelligent, automated outreach for client acquisition and servicing cases.

Embed compliant texting within the Salesforce user interface for instant client communication within your system of record, driving more value from CRM and enriching records.

hearsay + 

Seamlessly connect Hearsay, the leading client engagement platform for financial services, with your version of Salesforce.

### BENEFITS

- Empower advisors and agents to engage with clients on modern channels like social media, text messaging, and mobile calling while adhering to regulatory standards
- Sync "last-mile" engagement channels (text, mobile calls) and enrich Salesforce with robust client engagement data, embedded compliant texting capabilities and more powerful, configurable workflows
- Free up your field team's time for more strategic work, by automatically pushing last-mile interaction data into CRM, while driving adoption of your CRM investment

### INTEGRATE DATA FROM



Social

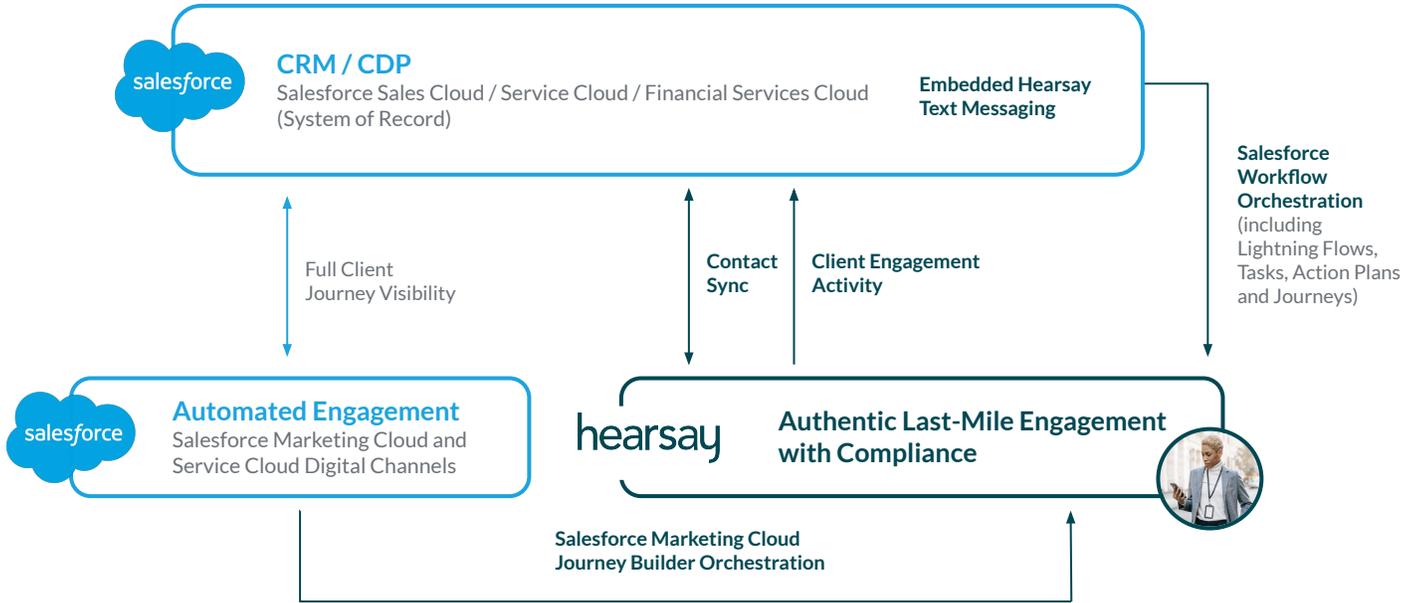


Relate



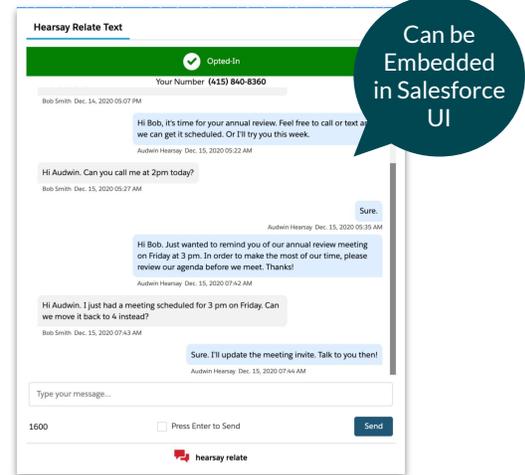
Sites

# Bridging the Last Mile Data & Action Gap



## Key Areas of Integration Between Hearsay & Salesforce

1. **Sync Contacts Between Salesforce and Hearsay**
  - Keep CRM and Hearsay client contacts up-to-date and ready for follow-up across platforms
2. **'Last-Mile' Client Engagement Activity Sync**
  - Gain visibility into advisor-client touchpoints and enrich CRM data
3. **Embed Hearsay Relate in Salesforce UI**
  - Optimize advisor efficiency and the client experience with last-mile compliant texting within Salesforce
4. **Intelligent Workflow Orchestration**
  - Integrate Hearsay into workflows—Lightning Flows, Tasks, Action Plans and Journeys—to enable intelligent, automated outreach for client acquisition and servicing cases



“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.com

### ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the human-client experience in financial services. The Hearsay Client Engagement Platform empowers over 200,000 advisers and agents to authentically and intelligently grow business relationships by proactively guiding and capturing the last mile of digital communications. The world’s leading financial firms—including Allstate, New York Life, Morgan Stanley, and Charles Schwab—rely on Hearsay’s SaaS platform to scale their reach, optimise sales engagements, and deliver exceptional client service in a consistent and compliant manner. Hearsay is headquartered in San Francisco, with globally distributed teams throughout North America, Europe and Asia.

Connect with us on [Facebook](#), [Twitter](#), [LinkedIn](#) and the [Hearsay blog](#).

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