



Pacific Life

Offering insurance since 1868, Pacific Life provides a wide range of life insurance products, annuities, and mutual funds, and offers a variety of investment products and services to individuals, businesses, and pension plans.

CHALLENGE

Pacific Life was looking to empower their field and internal wholesalers in the Retirement Solutions Division to stay top of mind and engaged with the advisor community they serve to drive awareness and business opportunities.

SOLUTION

Partnering with Hearsay Systems, Pacific Life deployed a social media solution to their entire sales team to enable them to compliantly engage with advisors on LinkedIn.

RESULTS

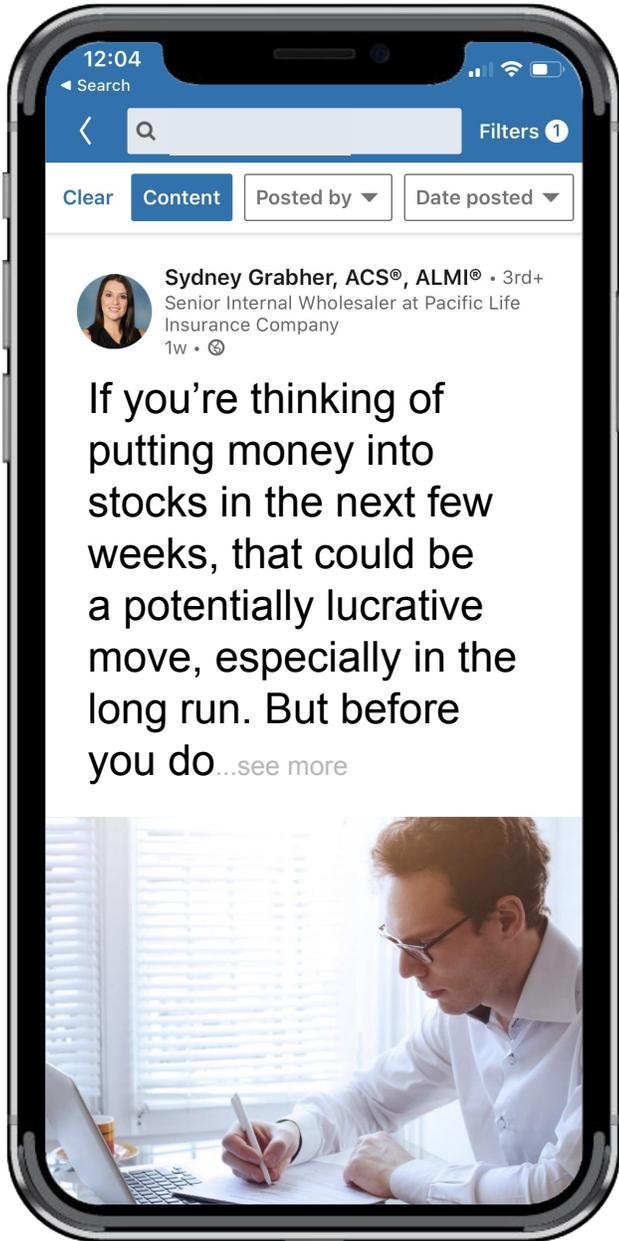
- With 150 wholesalers (both internal and external) using Hearsay Social, Pacific Life conducted a survey to measure the value of the program. The key takeaways from the survey proved there is value in the use of social media to drive sales activities and an increased comfort level and proficiency on the use of social media for business.
- 1 in 2 wholesalers have been able to reach new advisors whom they couldn't connect with before the program. In addition, sales activity attributed to social media led to an average of 3.8 meetings and 1.6 new sales per wholesaler using LinkedIn and Hearsay.
- When it comes to comfort and proficiency in the use of social media for business, 72 percent of wholesalers felt comfortable interacting with advisors on LinkedIn and 79 percent have a good understanding how to use LinkedIn for business. Most wholesalers were posting content multiple times a week and primarily leveraged LinkedIn to learn more about advisors before an appointment.
- Overall, this initial data suggests real and perceived value of social media use for business. Pacific Life hopes to use the main takeaways from this survey to help identify ways to improve its social media efforts and to serve as a benchmark for future analysis.

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Using Hearsay Social, Pacific Life wholesalers averaged **3.8 new meetings** and **1.6 new sales**

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hearsay social™



“I know that many firms are embracing LinkedIn and encouraging advisor to use social media more and more in practice. I see LinkedIn and Hearsay as a growing business interest and an effective and easy tool to leverage the gathering of information and foster relationship building.”



Pacific Life
Wholesaler

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

VISIT hearsaysystems.com

EMAIL contact@hearsaysystems.com

CALL +1 844-556-4396

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.

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