

The Hearsay Dynamics 365 Connector

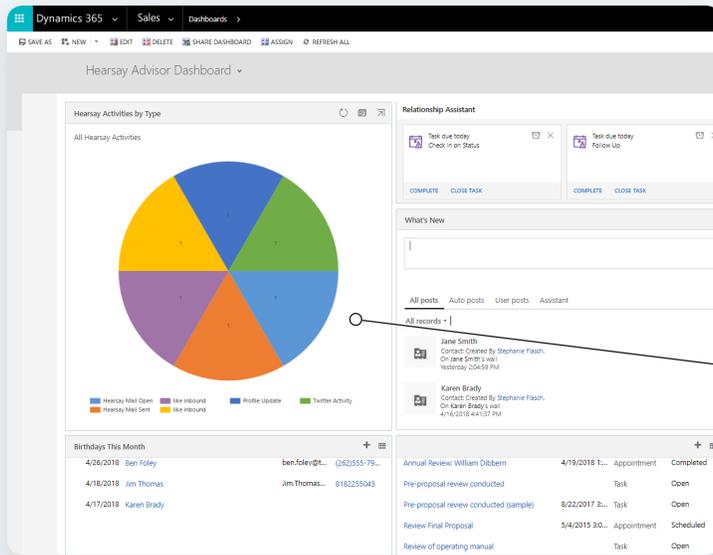
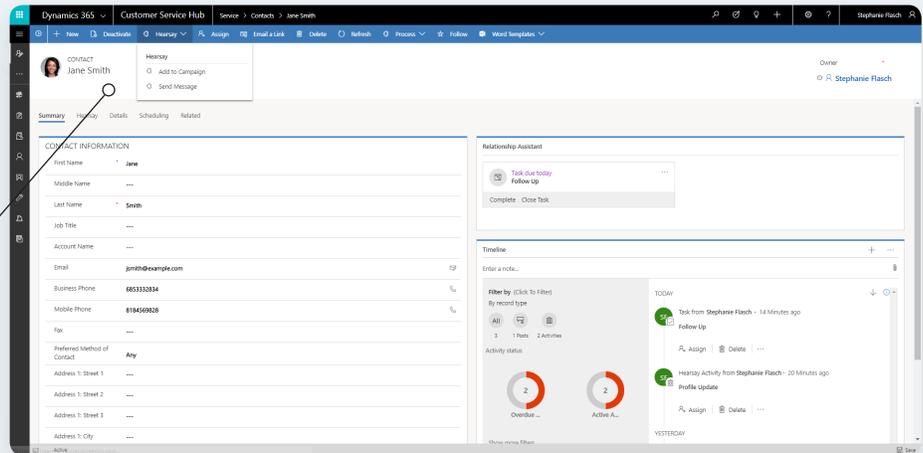
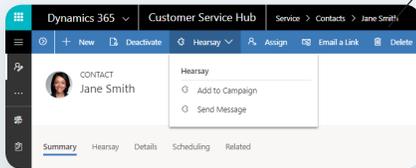
Client engagement at your fingertips.



Hearsay seamlessly integrates with Microsoft Dynamics to capture essential data about advisors' client engagement activities. The insights from this data can help firms make informed decisions to accelerate advisor production, increase CRM adoption and improve the client experience.

Prescriptive workflows

Built into the Dynamics UI to drive efficiency.



Critical advisor activities

Captured across channels instantly.

Integrating with Hearsay can boost data in your system 10-15x

Hearsay and Microsoft have partnered to develop the Hearsay Dynamics 365 Connector, an integration that dramatically accelerates advisor production through automation and advisor-specific workflows. The Hearsay Dynamics 365 Connector enables corporate sales and marketing teams to quickly acquire a deeper understanding of their advisor's client engagement activities. Data from field activities can now flow seamlessly into and out of Microsoft Dynamics, dramatically increasing the value and utility of your CRM.

Key Takeaways



- Increase data captured in Dynamics by 10-15x
- Instantly record high-quality field-level activities across Social, Sites, Messaging and Voice
- Drive prescriptive workflows specifically designed for financial services
- Intelligent “Next Best Actions” to guide client and prospect follow-up
- Nurture cross-sell and up-sell opportunities within Dynamics
- Gain insights to make intelligent SLAs for your field

Seamless integration maximizes your Dynamics investment



Hearsay's integration can be tailored to your specific Dynamics configuration, data requirements, and compliance standards. Increase the volume and accuracy of your client engagement data points to enrich your existing sales, marketing, and analytics campaigns.

Better insights drive stronger business practices



Measure field productivity by looking at advisors' response time, frequency of touch and relevance of specific digital channels across the client lifecycle. By analyzing advisor-client activity and data, you can develop best-in-class SLAs to guide the development of your field.

Drive field production



Simplify your advisors lives to make them more effective. Enable prescriptive financial services workflows that drive the most vital actions and automate record keeping to free up time.

Hearsay respects the Dynamics UI



Drive workflows that are built into Dynamics and complement the existing experience, thereby enabling a single system of record to combat disparate digital initiatives spread throughout your organization.

Enrich client outreach efforts across your business



Simultaneously sync with other core systems to drive more targeting, lead scoring and persona based efforts across Dynamics, Marketing Clouds, and any Data and Analytics platforms.