



Unleashing your Marketing Potential

Jo Gilbey – Marketing Director



Digital Marketing – a necessary evil for advisers?

- No time
- No expertise
- Regulation makes it too difficult
- It's too expensive



'I only deal with
HNW clients and
they expect face to
face contact'

My clients are older
- they don't engage
with social media'

'I'm going to sell my
business in a few
years, so I don't
need to do this'

'I've got enough
clients, I don't need
to get involved'



- An off the shelf marketing system
- Designed for the busy adviser, NOT a marketing expert
- Simple to use
- Helps with compliance – FCA and MIFID II
- Supported by Intelliflo's Marketing team



THE DIGITAL ADVISOR

How Social Media & Digital Are Transforming How Financial Professionals Hire & Sell

Chris Andrew

Managing Director, Hearsay Social Europe

Luca Warshaw

Customer Success Manager, Hearsay Social Europe



TODAY'S AGENDA

- ABOUT HEARSAY SOCIAL
- WHY SOCIAL BUSINESS AND DIGITAL MATTER
- BRIEF DEMO
- THE INTELLIFLO-HEARSAY SOLUTION
- Q&A

COMPANY HIGHLIGHTS



- Based in Silicon Valley with customers in 18 countries
- Differentiated platform combining omnichannel advisor applications and predictive engine with embedded compliance, reporting, and enterprise architecture
- Market leader with 122 enterprise customers, including 7 of 10 largest global financial firms
- Large and growing market opportunity driven by global growth in social, mobile, digital and enterprise need to drive relevance and productivity of sales rep channel
- Proven customer ROI
- Trusted by C-suite, loved by reps

PROVEN MARKET LEADERSHIP ACROSS FINANCIAL SERVICES

INSURANCE



of 10 global
financial
firms

WEALTH/BANKING



SOCIAL AND MOBILE TECHNOLOGY ARE CHANGING THE WAY WE LIVE





NOT JUST MILLENNIALS—
EVERYONE IS ONLINE

70%

of online adults
have social
media profiles

50%

Of millionaires
over 65 use
Facebook

BEFORE

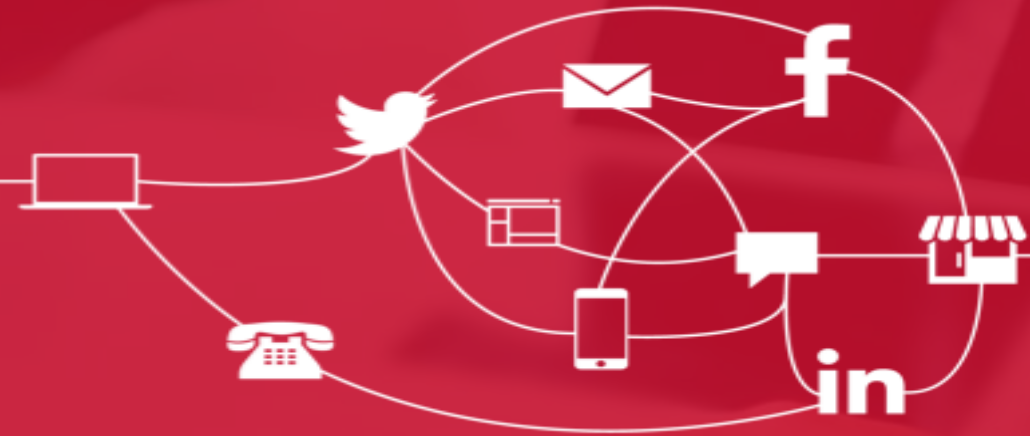
HOW ADVISORS SOLD



Advisor-led, linear, few offline channels

TODAY

HOW CLIENTS DECIDE



Client-driven, digital and multi-channel

We must help advisors adapt to today's social, mobile customer.

SOCIAL MEDIA AND DIGITAL ARE AN EFFECTIVE MEDIUM FOR



Future proofing your business
with new leads from -
Children/grandchildren of current
clients, Affluent millennials



**Engaging with referral
ecosystem**
(accountants, lawyers etc)



**Marketing your
business at scale**
(continuous interaction at scale)

CHALLENGES OF DIGITAL MARKETING FOR IFAS



Not enough time

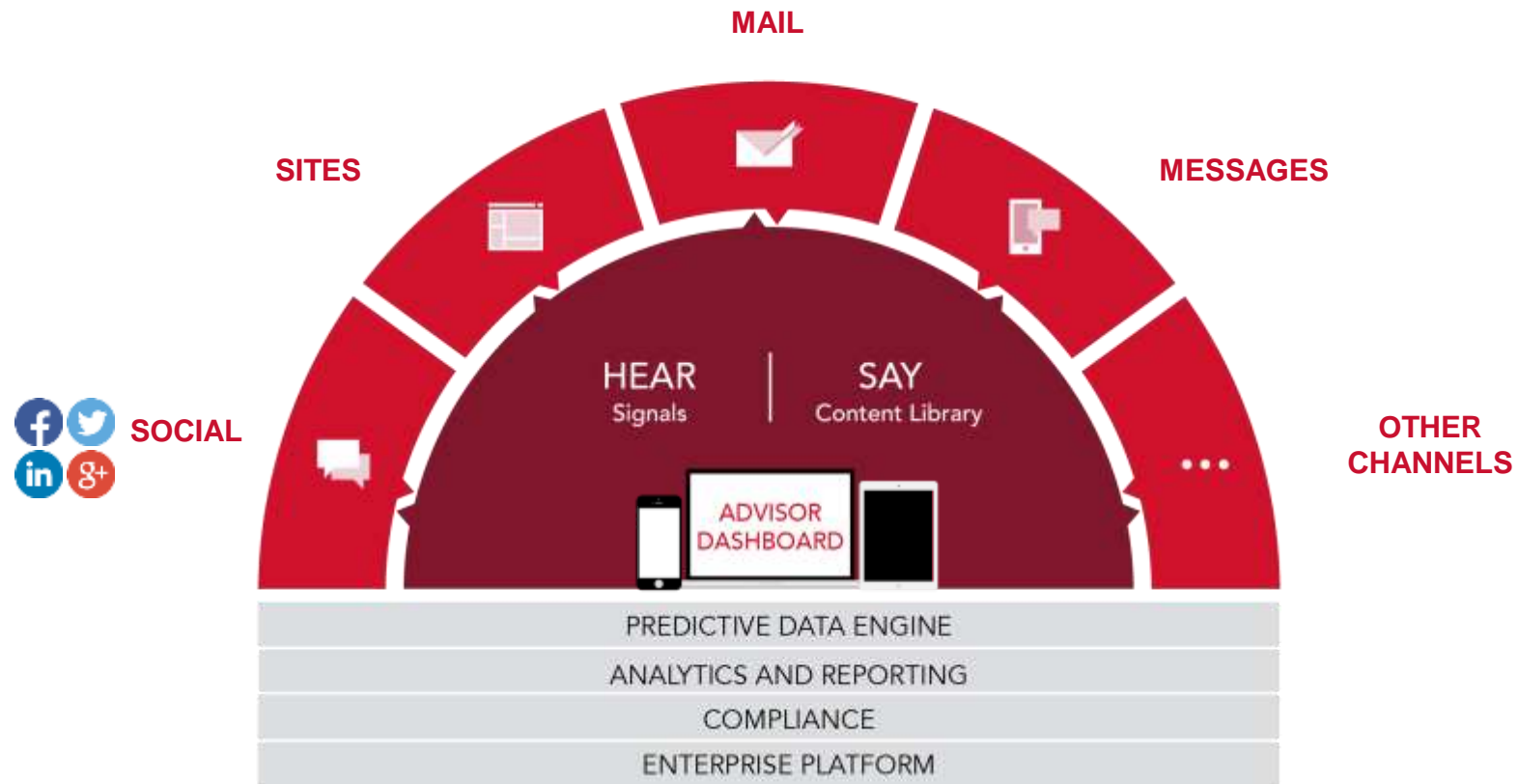


Advisors are not sure
what to say or do



Complex regulations
and company policy

HEARSAY SOCIAL'S DIGITAL SALES AND MARKETING SUITE FOR ADVISORS



PREDICT → PRESCRIBE → PERSONALIZE



DEMO OF HEARSAY SOCIAL



TRANSLATING YOUR OFFLINE
SKILLS TO DIGITAL FOR THE
SOCIAL ERA

Just like the Yellow Pages, being
listed isn't enough

PROVEN ROI FOR WEALTH MANAGEMENT FIRMS

The average firm on Hearsay Social has **900+ advisors on social**. The average advisor has **375+ connections, 16 posts** per quarter.

Wealth Management
Firms Report

9-22%

higher production for
advisors using Hearsay
Social

“17% higher client acquisition”

– Leading diversified financial services firm

**“11% more referrals than non-Hearsay
Social advisors”**

– Leading US wealth management firm

**“14% higher production rate for advisors on
Hearsay Social in comparison to overall advisors”**

– Leading US Wealth Management Firm

“22% sales uplift”

—Fortune 500 financial services fraternal organization

*“I find it really easy to use and it’s great
having Compliance-approved messages
available at the click of a button.”*

—DONNA, WEALTH ADVISOR, UK

*“I’ve received a mortgage & protection
appointment from one of the Hearsay
Social posts on my Facebook Page,
pretty chuffed for first week!”*

—CLAIRE-ANNE, WEALTH MANAGEMENT ADVISOR, UK

THE INTELLIFLO/HEARSAY MARKETING SOLUTION

- ✓ **Digital suite of tools**
 - ✓ social platform to engage across multiple social media networks,
 - ✓ SEO optimised, mobile friendly advisor websites
 - ✓ 1:1 email marketing tools
- ✓ **Easy to use**, unified dashboard for all your client marketing and communication across multiple channels
- ✓ **Pre-populated content library** to help you build your brand and engage with prospects and clients at scale
- ✓ **Training** to upgrade your digital skill set
- ✓ **Compliance** functionality for FCA and MIFID II compliance

WHAT YOU CAN DO TODAY

- ✓ **Visit** the Hearsay Social exhibition stand
- ✓ **Register your interest** in participating either in the pilot or full rollout –
at the booth or via the online submission form
- ✓ **Email us at intelliflo@hearsaysocial.com** with any questions

First 5 firms
to signup for
pilot get first
**3 months
free!!**

So having heard about social and content marketing, we'd like to gauge your interest in this topic via the app please. Is social/content marketing an area which:

1. You've already got covered in your business?
2. Is of interest to you in the near future i.e. during 2016?
3. Is of interest further out – say 12 months+ ?
4. Not of interest at all

