



# THE NEXT DIGITAL FRONTIER FOR FINANCIAL SERVICES

Growing Business on Social & Digital

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# ENABLING ADVISORS TO SUCCEED IN THE DIGITAL AGE

**100,000+** Users

**20+** Countries

**PROVEN** Success

SEQUOIA 

NEA.

LIMRA  
Elite Strategic Partner

sifma  
Invested in America

GAMA  
INTERNATIONAL

Efma

*“With Hearsay Social, I turn every client relationship into 5 – 10 new client relationships.”*

—Insurance agent user



## PREDICTIVE SOCIAL SUITE FOR ADVISORS & AGENTS

- ✓ For advisors, agents, wholesalers, and marketers
- ✓ Attract, retain, deepen and grow relationships via digital
- ✓ Enterprise governance & corporate compliance

hear say social.

# THE INDUSTRY STANDARD



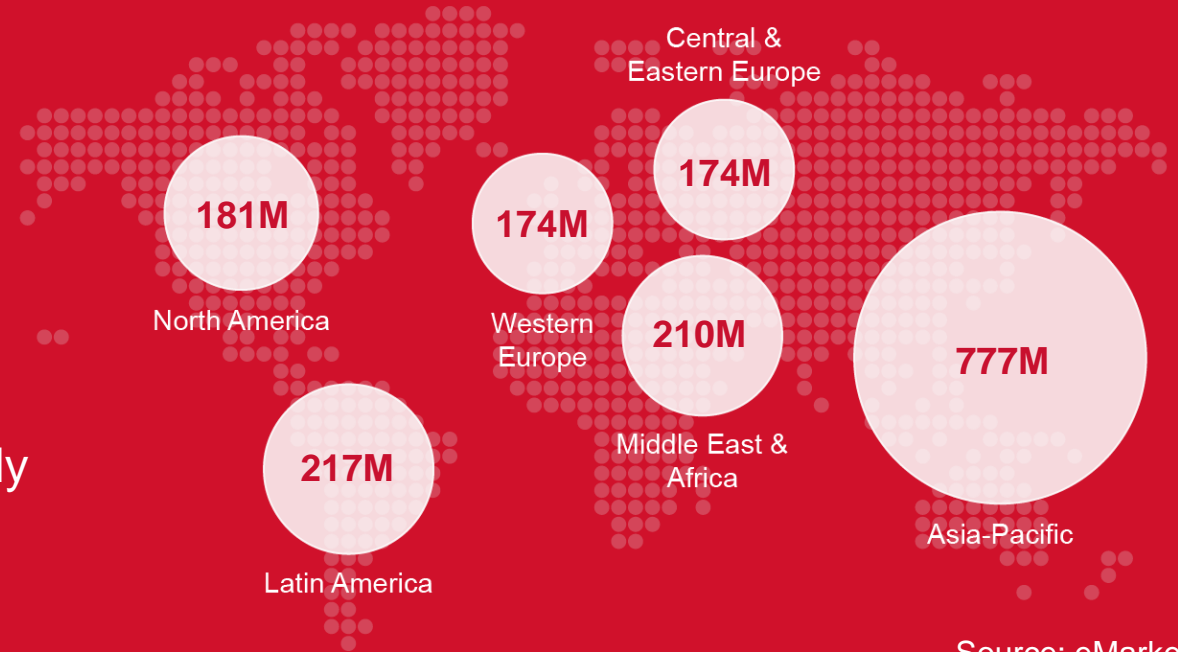
CONFIDENTIAL



# THE WORLD HAS GONE DIGITAL

- 3B+** People with internet access
- 2B+** Active social media accounts
- 7B+** Hours spent on social networks monthly

## Monthly active social users



Source: eMarketer

**87%**

Millennials always have their smartphones on them

**#1**

Social is top Internet activity, surpassing email

**6**

Hours average American spends per day on social, mobile, digital

SOCIAL AND MOBILE TECHNOLOGY ARE  
CHANGING THE WAY WE LIVE

2005

2013

# SOCIAL AND MOBILE TECHNOLOGY ARE CHANGING THE WAY WE LIVE



# TECHNOLOGY HAS CHANGED CLIENT EXPECTATIONS

- Online sources influence offline purchases
- Personalized and personal service
- Ability to communicate on their terms

TRADITIONALLY, THE CUSTOMER JOURNEY  
LOOKED LIKE THIS



Limited channels, linear progression





CLIENTS HAD TO GO THROUGH ADVISORS  
TO ACCESS AND TRANSACT ON PRODUCTS

# TODAY, THE CUSTOMER JOURNEY LOOKS LIKE THIS

Numerous, mostly digital channels, nonlinear engagement



THE OLD WAYS OF REACHING CLIENTS AND PROSPECTS ARE NO LONGER WORKING



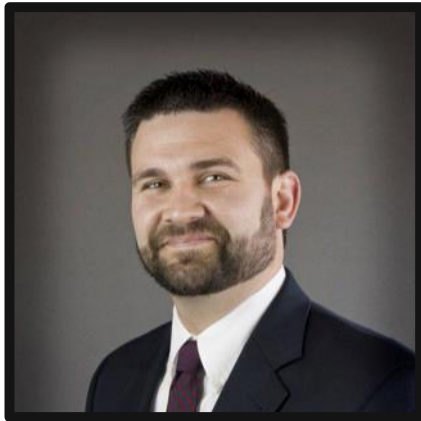
## **OBSOLETE ADVISORS** (*n.*) :

a) spend their time doing tasks that software algorithms can do better and faster

a) have not adapted to engage when and how clients prefer

# WILL THE ADVISOR SURVIVE?

**TRAVEL AGENT**



**ADVISOR**



BUT HOPE IS NOT LOST

There's an explosion of opportunities... where you need to know **how to relate to other people**, and that's something that **we can cultivate and encourage to a greater extent**, and where humans still have a huge edge **over machines**.

—Erik Brynjolfsson, Author of *The Second Machine Age*

## THE AGE OF THE TRUSTED ADVISOR

- High-Touch at Scale
- Personalized and Personable
- Informed by Data, Built on Relationships



# TECHNOLOGY-EMPOWERED ADVISOR



# 1 – ENGAGE CUSTOMERS AT SCALE

STRONG TIES



WEAK TIES



Makes it possible to stay in touch and top of mind with valuable weak ties.



## 2 - RECRUIT THE NEXT GENERATION

### 3 - HELP AGENTS BUILD THEIR BUSINESS FASTER

*“Social media is the natural tool for me to reach out to my contacts to start building my book of business.”*

*– 1<sup>st</sup>-year Agent*

AND YOUR ADVISORS HAVE NEVER  
NEEDED YOU AS THEY DO TODAY



hearsay social.

# HOW TO LEAD YOUR TEAM TO SUCCESS IN THE DIGITAL AGE

- ① Time to reflect, re-tool, respond.
- ② Lead by example – sign up for social, understand digital.
- ③ Enable your champions for innovation in your organization.
- ④ Resist the naysayers.
- ⑤ Be the innovation curator to connect the dots and prioritize.



THANK YOU!

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