

Client Servicing Back-Office Agent

Resolve client requests faster,
with full process control

Trask Client Servicing Back-Office Agent helps back-office teams handle high volumes of client requests, complaints, and operational tasks quickly and consistently. It classifies incoming requests, validates the required information, and supports decisioning end to end, so teams can keep service levels under control even during demand spikes. Everything runs inside your secure environment, with your business rules, approval process, and audit requirements in place.

The Result

Faster resolution, fewer backlogs, more consistent decisions, and better control over back-office operations.

What Changes When the AI Agent Takes Over?

The team shifts from processing every case manually to supervising a controlled decision flow. Standard requests are handled automatically, while exceptions are routed to the right specialist with the necessary context already prepared. This keeps service quality stable during volume peaks and gives managers a full audit trail for every decision.

Four Benefits for High-Volume Client Servicing



**From days
to minutes**

Faster case handling reduces processing time.



**Lower
operational load**

Automates repetitive back-office steps so teams focus on cases that need judgment.



**Consistent
decisions**

Reduces decision variance across shifts, branches, and reviewers.



**SLA
protection**

Keeps turnaround times stable during demand spikes, without extra headcount.

By automating classification and decisioning, the agent helps back-office teams run predictable, compliant, and scalable client-servicing operations.

Best fit: Designed for all industries.

How It Works: A Controlled Path from Request to Resolution

- 1 Request Intake.** Client request enters via standard front-office channels – branch, internet banking, call center, mobile, partner and is added to a unified queue with attached documents.
- 2 Document & Data Checks.** Agent validates attached documents and case data against internal records, flagging missing or inconsistent inputs before classification.
- 3 Case Classification.** LLM-based classifier assigns the case to the appropriate outcome path. Low-confidence cases route to a human reviewer with the gathered context.
- 4 Decision Logic Execution.** Agent executes the decision through existing back-office APIs: posts entries, updates records, triggers downstream workflows, notifies dependent systems.
- 5 Final Output & Handover.** Customer notified. Full decision record logged and archived for audit. Case posted to the unified queue for the responsible team.

Why Trask?

Trusted enterprise partner

30+ years in banking, insurance, telco, energy, automotive, and manufacturing. We understand complex environments and systems at scale.

AI-enabled engineering

AI supports how our 1,100+ engineers deliver, from analysis to operations. Faster delivery, with quality and control.

Production-ready AI

We build AI solutions for enterprise use, from RAG and smart search to AI agents. Secure, governed, and integrated.

Ownership beyond go-live

Trask designs, integrates, runs, and improves business-critical systems through Managed Services. Reliable and relevant after launch.



Need Faster Client Request Handling?

We'll test the agent on your back-office process and show how it helps resolve cases faster, reduce backlogs and keep service levels under control.

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