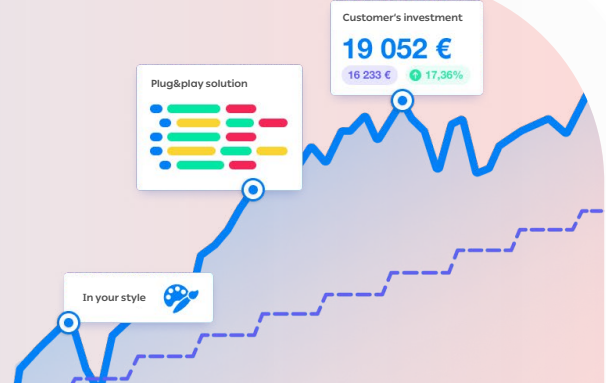






## About Finax



**Finax**, a leading passive investment platform, faced a common growth challenge in 2023: how to scale customer service across multiple European markets without compromising quality or increasing operational costs.

Operating in several EU countries, Finax offers passive ETF portfolios and financial products to a wide consumer base. However, each market has unique language and regulatory demands, making communication increasingly complex as the business expanded.



## The Need for Scalable, Efficient Communication

As Finax grew its presence across countries, including the Czech Republic, Poland, Hungary and Romania, the limitations of its fragmented communication tools became clear. Customer interactions were being handled across disconnected systems, and their previous voice solution could no longer meet the rising volume of enquiries.



*"Our main objective was to unify and streamline communication. We needed a single platform to consolidate all our customer interactions and offer automation options. Data security was non-negotiable given our industry."*

**Richard Hamrák**, Customer Experience Teamleader





The Daktela platform unified voice, email, webchat, and more into one easy-to-use interface - dramatically improving agent efficiency and visibility.



A key success factor was Daktela's open API and integration capabilities, which enabled Finax to connect customer interactions with their internal systems and workflows. The platform also met strict financial data security standards.



## The result?

**Up to 33 % of clients who would have called** found their answers through the chatbot.

The chatbot also resolved questions corresponding to **13 % of tickets** that would have otherwise gone to agents.



## Supporting Growth with Stability

Over two years, Finax saw significant growth in customer interactions without expanding the size of its support team. Thanks to process automation and omnichannel integration through Daktela, they maintained high service levels while scaling efficiently.



*"Daktela has transformed the way we work. Centralising all communication in one platform has streamlined many internal processes. Agents have instant access to customer history, enabling faster and more accurate responses. Automation and analytics save us time and help us understand what our customers really need. This has led to higher satisfaction and consistently high-quality support."*

**Richard Hamrák**, Customer Experience Teamleader



## Next Steps: Expanding Chatbot Capabilities

Finax plans to continue enhancing the chatbot and expanding its functionality across all markets. This will further personalise the customer experience and ensure consistent, high-quality service regardless of country or channel.



### Ready to Transform Your Customer Support?

Discover how Daktela can help your organisation scale efficiently, improve service, and prepare for growth.



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