

INDUSTRY | FINANCIAL SERVICES

Financial services company



This company provides venture capital data and portfolio management solutions to asset allocators.

Challenge

The client's financial asset management platform, built on Experience Cloud, faced challenges in providing users with seamless access to real-time insights about their investment portfolios. Customers required detailed, up-to-date portfolio performance summaries and strategic financial guidance, but the existing solution lacked the ability to offer these insights in an easy-to-navigate and automated manner. Without an intelligent assistant to streamline these processes, customers were left without timely or personalized financial information.

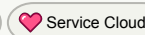
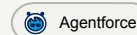
- Users struggled to access live, up-to-date analytics about their investment portfolios.
- Customers had difficulty finding comprehensive and easily digestible performance summaries for their investments.
- The platform lacked an intelligent assistant capable of providing users with actionable, strategic insights tailored to their unique financial needs.
- Navigating the platform for detailed financial information was cumbersome and time-consuming, leading to frustration and reduced satisfaction.

Solution

To address their challenges, we implemented the following solution:

- **Portfolio Management Assistant** – Developed an AI-powered assistant within the Experience Cloud portal to provide real-time portfolio insights.
- **Actionable Insights** – The assistant analyzes portfolio data to offer tailored recommendations and investment strategies.
- **Performance Tracking** – Allows users to track and analyze investment performance trends over time.
- **Interactive Q&A** – Users can ask specific questions about their holdings and receive data-driven answers in real-time.
- **Enhanced User Engagement** – The solution empowers clients to make informed decisions by providing easy access to critical financial information, improving overall user experience.

PRODUCTS USED



Outcome

By the end of the project, our client could:

- Provide clients with **real-time, data-driven** insights into their investment portfolios.
- Enable customers to **track and analyze** portfolio performance trends effortlessly.
- Deliver **AI-powered**, actionable investment recommendations within the Experience Cloud portal.
- **Enhance user engagement** and empower clients to make informed, strategic financial decisions.
- **Streamline portfolio management** by offering interactive, personalized support directly within the platform.

