INDUSTRY | FINTECH

## Fintech company



The client offers technology and tools designed to help financial advisors achieve better outcomes. Their mission is to make independent financial advice better, more affordable, and more accessible

## Challenge

Advisors rely on knowledge articles to find critical information through the portal, but the current system makes it difficult to locate the right content efficiently. Poor searchability and organization lead to frustration, wasted time, and potential errors in client interactions.

- Difficulty in finding relevant knowledge articles quickly.
- Poor search functionality and content organization.
- Inefficiencies leading to longer resolution times and frustration.
- Need for a more user-friendly and intuitive knowledge management system.

## Solution

To enhance knowledge accessibility for financial advisors, we implemented an external Agentforce service agent that:

- Searches and Delivers Answers Finds relevant knowledge articles and provides step-by-step solutions.
- Improves Search Efficiency Quickly retrieves the most relevant information from the portal.
- Enhances Advisor Support Reduces time spent searching for answers, improving response times.
- Automates Escalation Transfers inquiries to a live agent when the service agent cannot resolve
  the issue.
- Ensures Seamless Assistance Provides a smoother, more efficient support experience for financial advisors.





**PRODUCTS USED** 





## **Outcome**

By the end of the project, our client could:

- Improve Knowledge Accessibility Advisors can quickly find relevant information without frustration.
- Enhance Efficiency Reduced search time leads to faster resolutions and improved client interactions.
- Provide Step-by-Step Guidance –
   Clear, structured answers directly from
   knowledge articles.
- Automate and Streamline Support –
  Routine inquiries are handled by the
  service agent, freeing up live agents for
  complex cases.
- Ensure Seamless Escalation When needed, advisors can effortlessly connect with a live agent for further assistance.

