

INDUSTRY | FINTECH

Fintech company



- 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.

- **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.

