

Case Study:**How a Global Investment Management Company Utilizes Technology to Meet the Needs of Busy Clients****Introduction**

This top-tier financial services company offers a wide range of investment and retirement products to individuals, financial advisors, and institutions. With over 70 years of experience in the industry, the company has established itself as a trusted and reliable partner for its clients. However, customers are increasingly looking for digital-first solutions that offer fast and reliable services, resulting in a need for the company to enhance its digital capabilities and identify operational efficiencies that can minimize servicing costs.

Challenge

To meet customer expectations, the company needed to find a product that would:

- Simplify and automate the document creation and storage process to increase efficiency
- Elevate the online experience and provide customers with more convenient and personalized services
- Address the needs of time-constrained customers with enhanced digital capabilities
- Reduce operational costs by minimizing reliance on call center support and enhancing self-service options

Solution

This global investment management company implemented EngageOne Vault, from Precisely, a digital archiving product that integrates with companies' business systems to retrieve customer communications in their original form. EngageOne Vault provided the financial services company with a:

- Centralized archive for all customer communications
- Organize and store regulatory customer communications for quick access
- Empower customers with anytime access to communications
- Client service representatives (CSR) have real-time access to the right information to service customers

**Client**

Top-tier financial services company

Industry

Financial Services

Solution

EngageOne Vault

Benefits

With the implementation of EngageOne Vault from Precisely, this investment management company has dramatically increased efficiency, customer experience, and cost savings. The company has realized the following benefits:

- Rapid implementation time of less than three months for faster time to market
- Quick access to customer communication information has improved compliance and governance
- Online availability of customer communications diverted customer inquiry self-service, reducing call volume
- Real-time access to customer information accelerated customer service representative (CSR) response time to a customer inquiry