

**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