

Global Financial & Wealth Management Firm Improves Client Service & Reduces Cycle Time



Company

**Global Wealth
Management Firm**

Industry

Financial

Application

Financial Advisors

“ExpeData enabled a significant return on investment. We are expanding from 7 to 30 forms applications.”

ExpeData Partner

Challenge

- Sr. Financial Advisor’s errors impacted client service and delayed transactions
- Financial Administrator’s processing delayed new accounts set-up and transactions
- Manual scanning and data entry further delayed transaction processing
- Bottom line - several day delay in opening new accounts and processing transactions resulting in:
 - Dissatisfied customers
 - Delaying revenue generation
 - Delayed commissions earned by advisors

Solution

- ExpeData Digital Writing Platform hosted by the client
 - Internationalized, interpreting French language
- Seven different forms deployed

Results

- Clients of the bank enjoyed improved customer service
- Sr. Advisors reduced errors and accelerated transactions
- Dramatically reduce the number of Financial Administrators to process paperwork
- Eliminated costly scanning and manual data entry
 - Digital image available in client’s document management system within minutes
- Total cycle time reduced from days to hours accelerating revenues