

CASE STUDY

Manage wealth Better with CAI

softserve

Generational wealth is being transferred to digital native clients expecting a superior customer experience. **Are you ready to deliver?**

Our client is a financial advisor providing services across the United States including **wealth management, pension, and more** and needed a solution that:

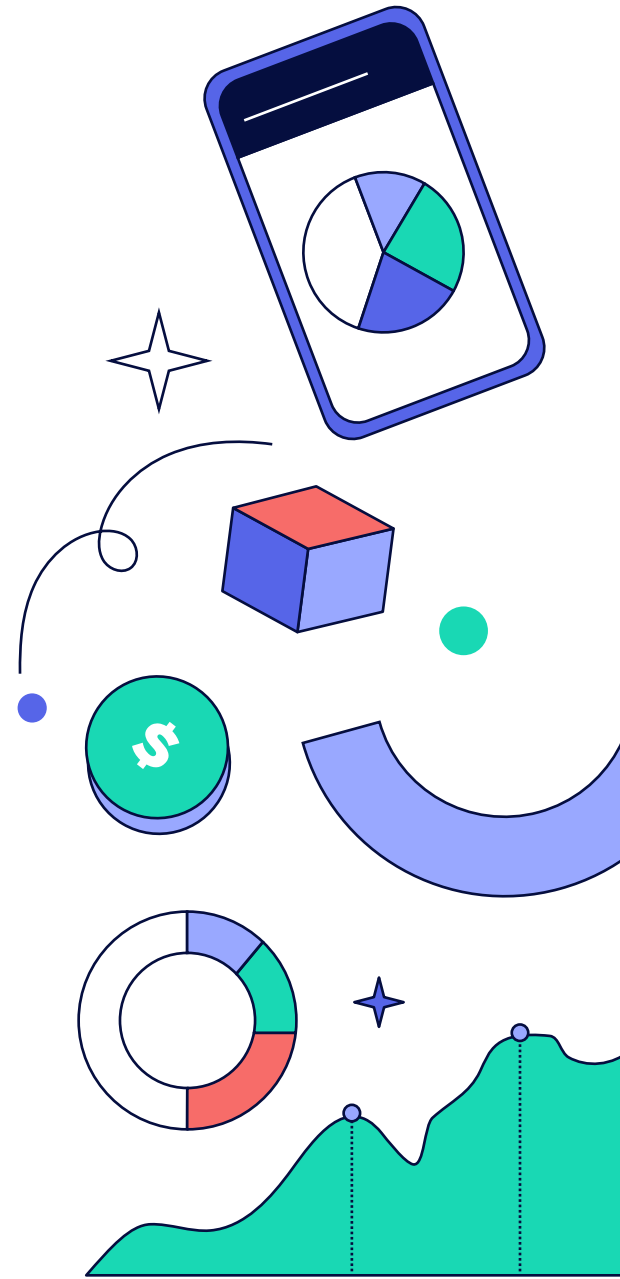
- Optimized internal processes
- Migrated all operational flow and client data into a single space
- Increased customer engagement

...While delivering **exceptional user experience**.

SoftServe identified leading global trends in the financial advisory industry, with focus on two key areas in need of improvement: **Optimizing internal workflows and improving digital experiences** for clients.

The result?

SoftServe delivered a solution that combines cloud with conversational AI to unlock the potential of digital engagement while providing an interactive and flexible client journey.



Introducing, CAI.

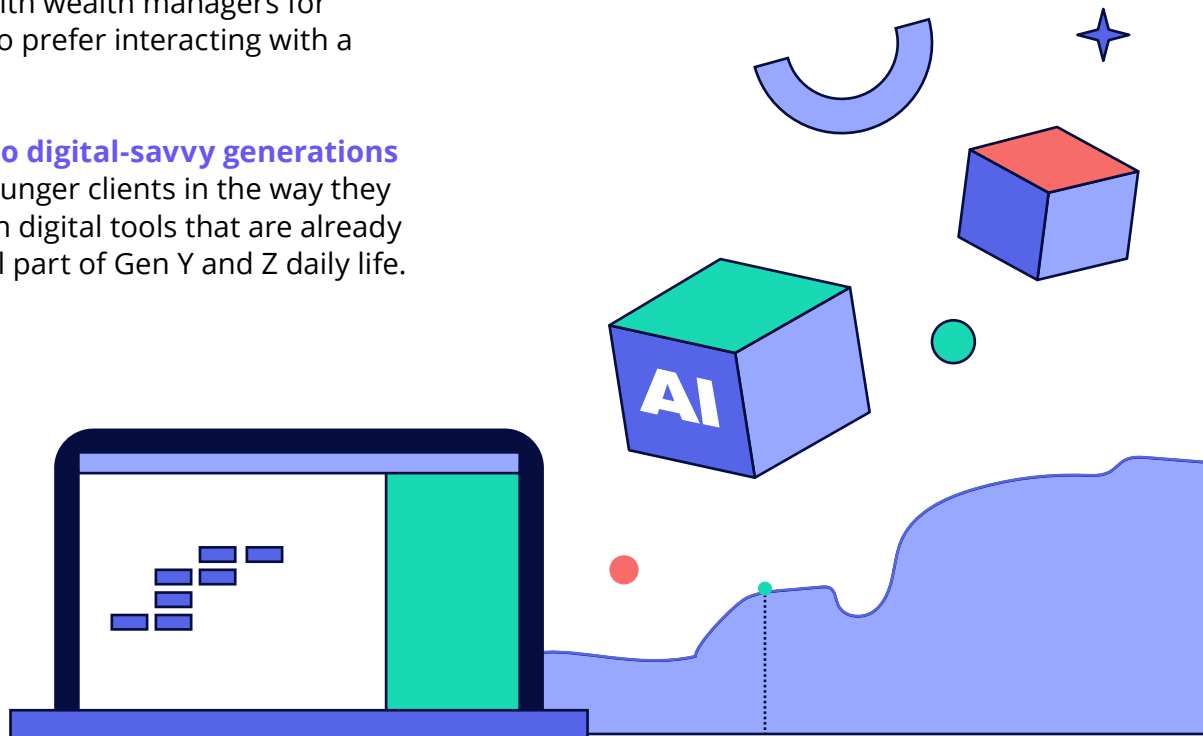
CAI makes wealth management easier for companies and their clients with:

- **Improved workflow efficiency** by organizing existing and incoming client information to improve workflows. All documents are structured and stored, so client data won't be lost or mishandled.
- **More time to focus on qualified leads** because CAI intercepts all non-relevant and non-qualified leads, giving wealth managers more time to spend with viable prospects.
- **Increased client satisfaction** through human-centric chat that onboards, consults, and provides data collection and simple guidance—or instantly connect with wealth managers for clients who prefer interacting with a human.
- **A bridge to digital-savvy generations** serving younger clients in the way they prefer with digital tools that are already an integral part of Gen Y and Z daily life.

Forward thinking wealth managers can leverage CAI for...

- First point of contact for incoming client communication
- Administrative assistance with operational tasks
- Saving time on account maintenance, data management, and planning calls

[LET'S TALK](#) about how CAI can help you serve the next generation of wealth management clients and deliver exceptional engagement through the power of AI-driven digital.



ABOUT US

SoftServe is a digital authority that advises and provides at the cutting-edge of technology. We reveal, transform, accelerate, and optimize the way enterprises and software companies do business. With expertise across healthcare, retail, energy, financial services, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe delivers open innovation, from generating compelling new ideas, to developing and implementing transformational products and services.

Our work and client experience is built on a foundation of empathetic, human-focused experience design that ensures continuity from concept to release.

We empower enterprises and software companies to (re)identify differentiation, accelerate solution development, and vigorously compete in today's digital economy. No matter where you are in your journey.

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