

Enhancing Digital Onboarding: A Seamless Transition to a New Investor Platform

THE SITUATION

An asset manager needed to upgrade their investor platform to meet growing demands for better digital experiences. The new platform included multi-factor authentication (MFA) for added security. During the rollout, the manager anticipated most investors would adapt smoothly to the new sign-on process but expected a surge in call volumes from those with questions. Customer dissatisfaction could potentially result in:

- Loss of customers due to delayed responses
- Limited adoption of new self-service features
- Insufficient staffing to handle the increased call volume

THE SOLUTION

To address these challenges, the asset manager turned to SS&C Flex for supplemental customer care support. The Flex team rapidly deployed resources to handle urgent requirements, which included:

- A fully scripted call center supporting both investors and registered representatives
- A dedicated toll-free line for website-related inquiries, routed from the main customer service line
- Assistance with MFA setup, web navigation, password resets and non-transactional queries
- Redirecting calls outside the event's scope to the asset manager's primary service team

THE RESULTS

- Reduced agent talk time by resolving login and navigation issues quickly
- Enhanced customer experience, enabling investors to transition smoothly to the new platform
- Minimized business disruption, allowing the asset manager to focus on normal operations
- Optimized service levels by flexibly adjusting staffing as volumes fluctuated
- Successfully introduced new self-service functionality, supporting the manager's broader goals for a connected service experience

SS&C Flex: Unmatched global support for business events

SS&C has 30+ years' experience in helping companies respond to seasonal, disruptive or extraordinary business events, with proven expertise in best practices, processes and systems.

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