

What's next



Dragon Professional

The race to go digital in financial services

From capturing and turning data into meaningful insights, using digital tools like robo-advisors to augment customer service, to new applications backed by artificial intelligence, the delivery of financial information today is being shaped by technology. While the opportunities for embracing new tools are boundless, putting customers at the heart of your digital strategy is the best approach.

Mark Geremia

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The race to go digital has many industries like financial services looking at new technologies,

such as those backed by artificial intelligence, to help transform their business. While the opportunities for embracing digital tools are boundless, racing towards the finish line isn't always the best approach.

We recently had the opportunity to speak at the [Ai4 Finance](#) conference last month in New York City. The conference, which is a first-of-its-kind for the industry, brought together business leaders, data practitioners, and pioneers, all of whom were meeting to explore how applying technology, such as artificial intelligence can help them solve problems and create opportunities across the spectrum of their services – from the use of robo-advisors to augment customer interactions, help with fraud detection and credit scoring to new approaches to better meet compliance.

For financial advisors in-particular, many of whom are looking at digital tools to help meet increasing regulatory requirements, the question becomes [how best to implement technology](#) in a smooth and effective way, while also putting customers first. It's this client-first thinking that wins the day.

Technology, for all its powerful possibilities, should be viewed as an additional asset to help advisors do their jobs better, not a replacement for [one-to-one human interactions](#). The advisor-client relationship, like all customer relationships, boils down to delivering a consistent and engaging customer experience that is built on trust. Adding a digital side to financial services amplifies these drivers.

Shifts, like those resulting from increased regulations where advisors need to demonstrate that they are serving as a fiduciary, make it even more important to keep a consistent client/advisor interaction, where advisors not only have to deliver the attentive, personalized services that clients seek but also [document these interactions clearly and accurately to help mitigate risk](#).

Conferences like Ai4 Finance remind us of the scores of new technologies that can help maintain trust and loyalty with customers, and also how important the human-side of going digital in today's technology culture remains.

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About Mark Geremia

Mark Geremia is Vice President and General Manager for Dragon Professional and Consumer and oversees the product and marketing strategy for Nuance's Dragon speech recognition and documentation workflow portfolio. Mark has held various leadership roles within the Dragon business over the last decade, and with his team continues to expand Dragon's reach across enterprise, legal and law enforcement markets, transforming productivity and documentation accuracy for professional individuals and large organizations. Prior to joining Nuance in 2005, Mark held key marketing management positions at both large and small technology companies. He holds a Bachelor of Science Degree in Business Management from Bentley College.

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