

Home & business productivity, Financial services

Making time to deliver an excellent client experience

Nuance Communications

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The ability to foster strong customer relationships is a crucial differentiator in financial services, and advisors who can build trust with their customers have a definite leg up on the competition. But when mundane tasks fill up the day, it can be challenging to find time to dedicate to building customer rapport. New productivity solutions can help automate tasks and free up time to build stronger relationships.

Financial advisors, like many professionals in service-related fields, spend a lot of time on administrative work. They need to keep up with daily paperwork, meet regulatory compliance requirements, and deliver the right products and services to clients. For advisors, a considerable part of providing an excellent customer experience is their ability to mitigate the degree of risk clients feel when making financial decisions.

Building this level of trust requires even more time fostering strong client relationships. A [recent survey](#) found that 88% of financial advisors say mastering “soft-skills” like communication and time-management are even more important than their technical knowledge of financial products.

But trust-building takes time. It takes phone calls, face-to-face conversations, and spending that extra twenty minutes to make sure clients understand the decisions about their investments. When advisors have so many of their hours tied up with admin tasks like paperwork, it can be tough to build a solid foundation with the customer.

Today, more advisors are turning to digital automation solutions to help them complete their

administrative work faster and free up time. In the same survey, 58% of advisors indicated that [digital automation in financial services](#) has the potential to free them from mundane tasks and improve client service.

There is no question, financial advisors have a lot to keep up with, and there are only so many hours in the day. But if they can make time to curate genuine trust in client relationships, it can make all the difference to both their client's success and their own.

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