What’s next

Dragon Professional

Making time to deliver an excellent client experience

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.

Mark Geremia
Posted August 13, 2019

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 feels 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’ success and their own.

Tags: Dragon Voice Recognition

More Information

Streamline financial documentation

Discover how to boost documentation productivity, while improving compliance and customer service – all by voice.

Learn more

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.

View all posts by Mark Geremia