

CASE STUDY

FINANCIAL ADVISOR GROUP

Liveware Labs played a pivotal role in assisting a large financial advisor group in overcoming challenges related to growth, reducing operational expenses, and enhancing customer service.

A Success Story of Outsourced Support for a Large Financial Advisor Group

Introduction:

Liveware Labs played a pivotal role in assisting a large financial advisor group in overcoming challenges related to growth, reducing operational expenses, and enhancing customer service.

This case study highlights how Liveware Labs' comprehensive suite of services help them scale and optimize their business process.

Results Statistics

The implementation of the strategies led to significant improvements in their operations:



30+

Customer Service Agents



< 17 MINS

Average Handling Time



80%

Net Promoter Score



www.livewarelabs.com

[livewarelabs](https://www.linkedin.com/company/livewarelabs)

contactus@livewarelabs.com

CHALLENGES

As the financial advisor group experienced rapid growth, it encountered several hurdles that necessitated expert guidance and specialized support. The primary challenges faced by the company were: growth strategies and reducing operational expenses.

ACTIONS TAKEN

We have implemented the following strategies to overcome the challenges and continue delivering exceptional services:



Scaling the Team

The size grew to 30 people and is on track to be 60.



Quality Strategy

facilitating strategic discussions



Performance Management

Streamlining communication and KPIs

RESULTS

Enhanced Growth

1

The strategic guidance provided by Liveware Labs' consultants resulted in the successful execution of growth initiatives, helping the company expand its market reach and boost profitability.

Improved Operational Efficiency

2

KPI structuring facilitated data-driven decision-making, enabling the firm to optimize operational efficiency and improve overall performance. Our dedicated customer service agents provided superior support, boosting client satisfaction and strengthening customer relationships.

Cost Savings

3

Through the outsourcing of customer service agents and other non-core functions, the financial advisor group achieved substantial cost savings, enabling them to reinvest in the business.



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