WMX (Wealth Management Accelerator)

Accelerate & Optimize Lead Acquisition Journey

publicis
sapient

Our Proposition

Enable Wealth Managers/RIA partnering with Lead provider firms to drive new client acquisition to

- Seamless experience
- Reduced time to market
- Scalable to several lead providers

Journey Maps

Customer journey maps	PS can help do Vendor Analysis based on Current State & Future State, overlaying Industry trends and future needs.
Workflow and Orchestration	PS can help integrate your current ecosystem with lead acquisition firm and automate processes.
Tech manifestation	PS can help in tracking the quality of leads and the conversion process in an automated way and help optimize the overall process.
Fintech/ partner list mapping	
Playbook	

Gen AI is ‘super-powering’ people and products

Automate

Task automation in all its forms from big to small

Synthesize

Data summarization, recommendation, insights, and decision support

Generate

Summarizing, creating, or optimizing content in its myriad forms

Develop

Creating, optimizing, and documenting design & code

Assist

Information, execution, or emotion support through cognitive agents

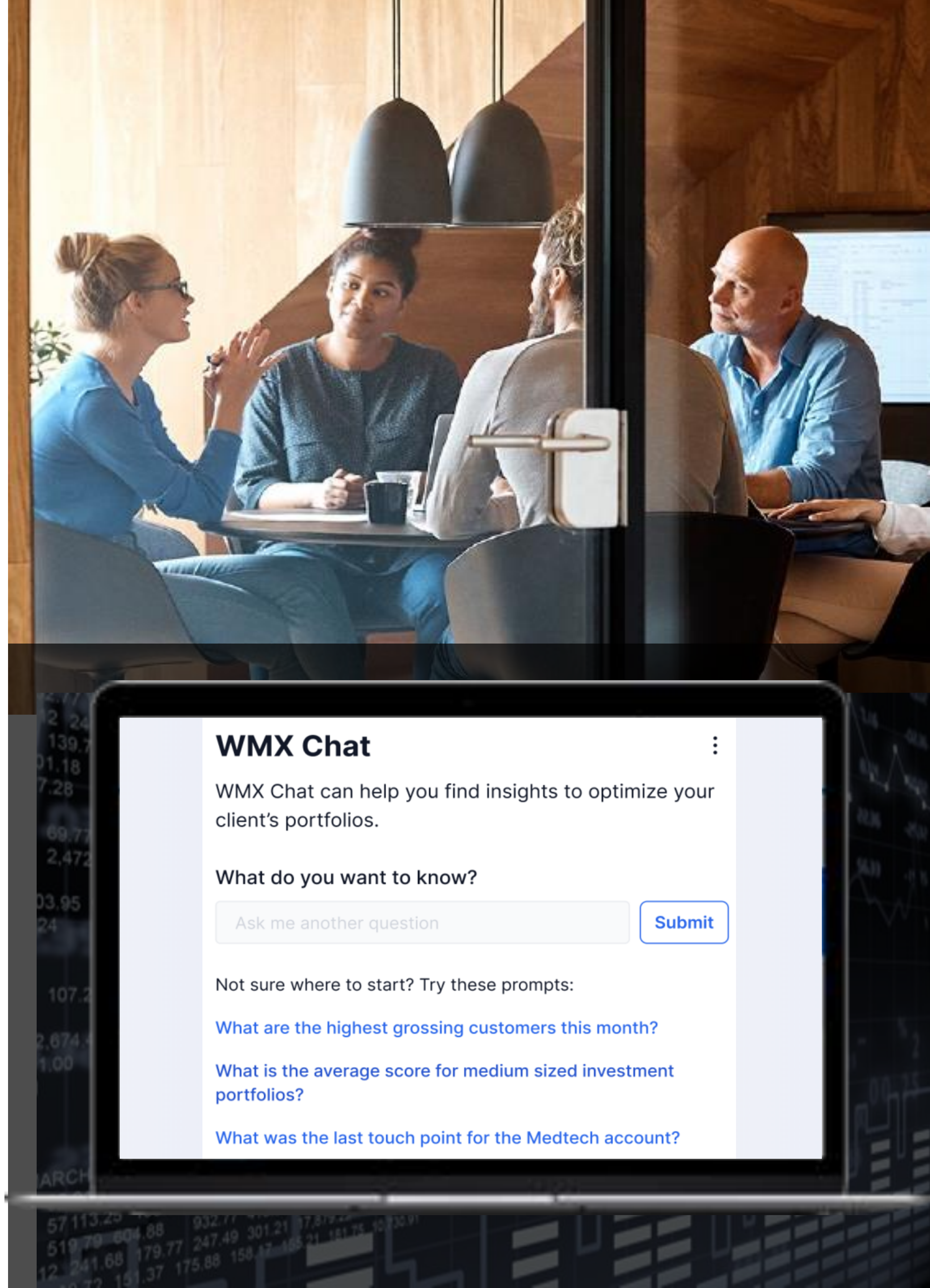
Empowering Advisor with next-generation conversational experience empowered with Generative AI Assistant

Key Challenge

- Advisors are unable to keep up with the large number of **research reports, internal documents, legal and compliance policies**, disclaimers and additional information that they have access to. There is no easy way to review and pull meaningful insights from all that content.
- Advisors' **clients' financial data** (accounts, transactions, statements, etc.) are spread across many inflexible, inconsistent, and disconnected systems.

Solution Approach

- Empower advisors with a **single, unified conversational interface** to query documents and client data using **natural language.**
- Applying Generative AI to derive **meaningful answers and insights** from this documentation and client data that Advisors can use to accelerate and increase the efficiency of their workflows.



publicis
sapient

publicis
sapient

WMX Key capabilities

Key Capabilities

Unified Interface

- **Q&A:** Provide question/answer based response based on documents ingested
- **Summarization:** Summarize research findings/insights based on natural language inputs
- **Clients Insights:** Ability to query the clients' financial information in natural language
- **Other use-cases:** *Prospect creation, Self-service, Statements, etc.*

Search

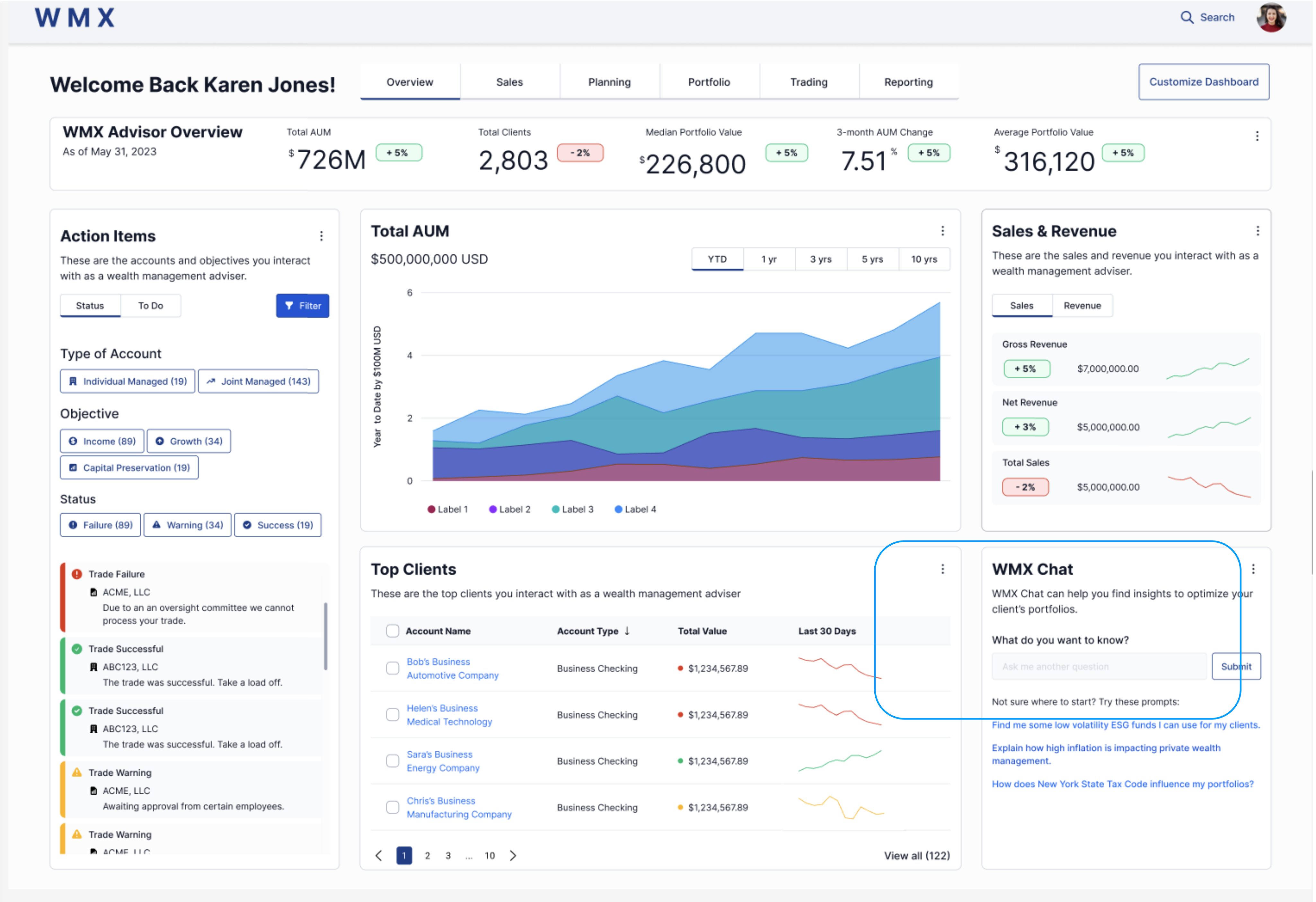
- **Semantic search:** Ability to provide the search results for text-based queries based on the context
- **Semantic ranking:** Ability to support ranked search based on established criteria
- **Type-ahead (autocomplete):** Ability to provide the suggestions as advisor/user type in the query

Common Features

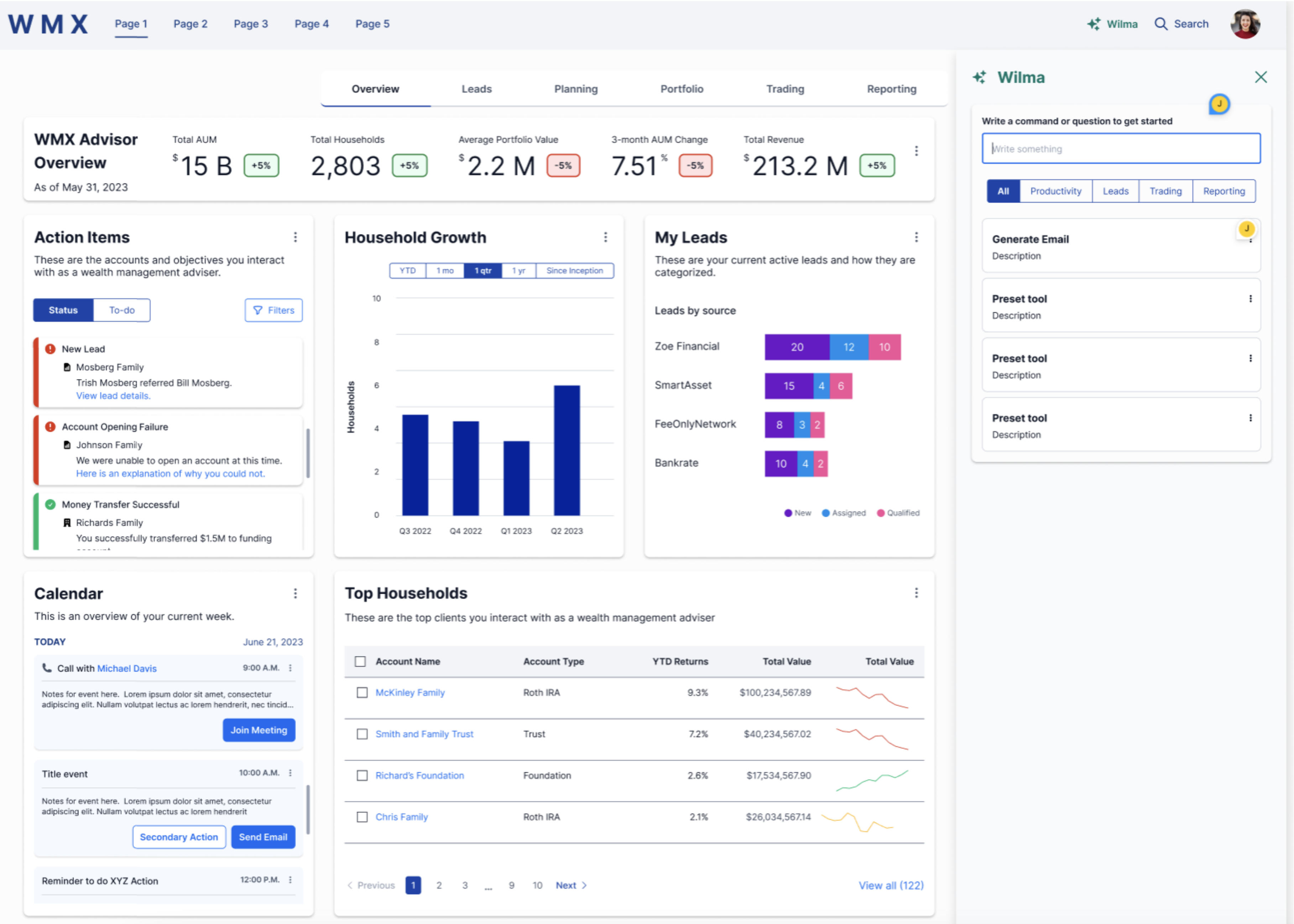
- **Content ingestion:** Ability to ingest unstructured documents (PDFs, Word documents, Text Documents) in an incremental manner, and index it for contextual search
- **Role/permission-based search:** Ability to control the access to the documents and results data with advisor/user in context
- **Legal & compliance check:** Ability to check pre & post processing of response from legal & compliance perspective

Key Outcome

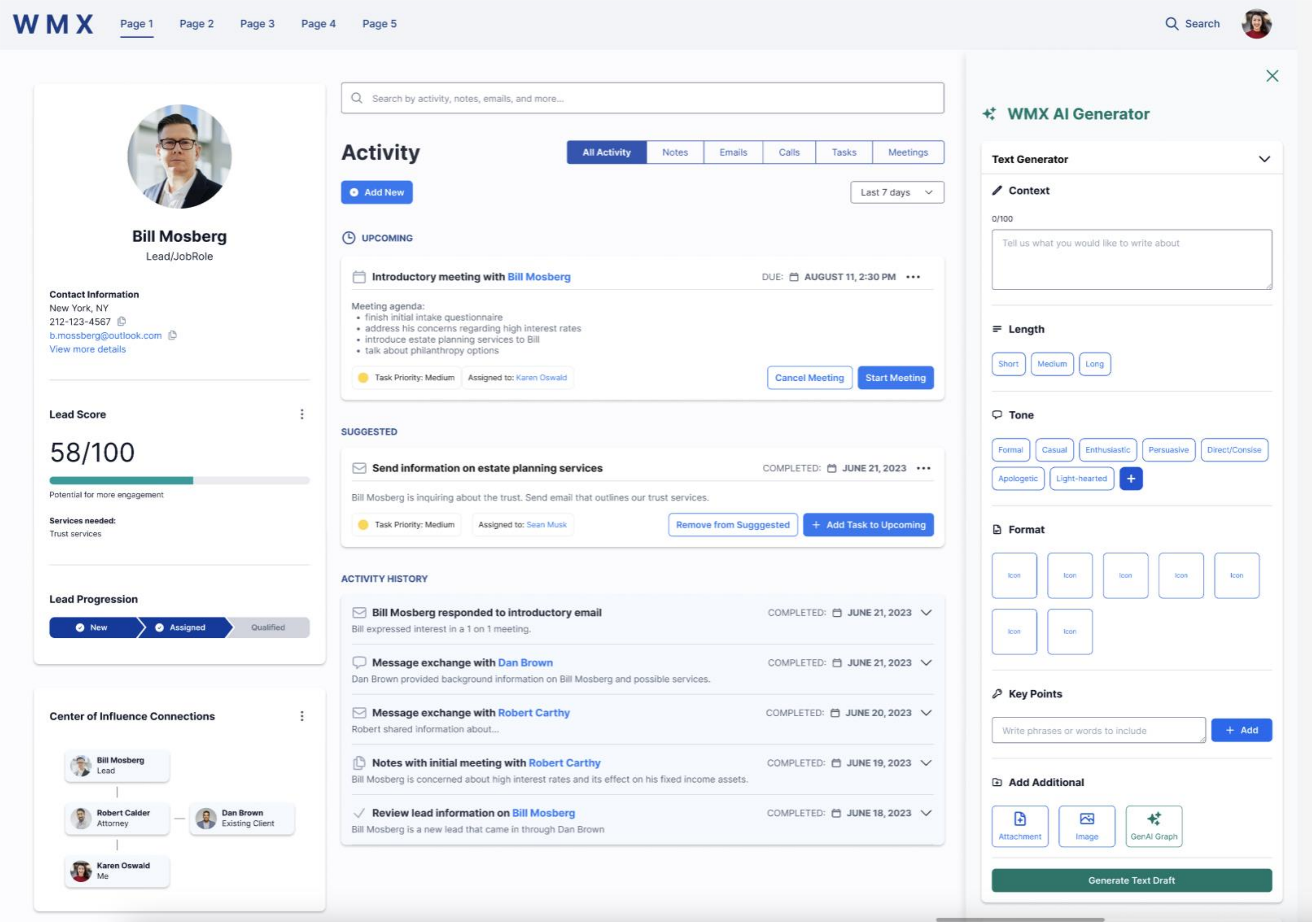
Relevant and meaningful response using Microsoft Azure OpenAI with enterprise data in context; providing insights to the advisors with improvement loop based on advisor feedback



publicis
sapient



publicis
sapient



publicis
sapient

publicis
sapient