



Case Study

Contact Center Solutions Boosted Bottom Line and Overall Efficiency

Waddell & Reed is a publicly traded asset management and financial planning firm. For nearly 80 years, Waddell & Reed has provided proven investment and planning services to individuals and institutional investors all across the country.



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WADDELL & REED

CLIENT CHALLENGE



With a central campus consisting of 1,200 team members, and an additional 2,500 independent advisors nationwide, Waddell & Reed was looking for a trusted partner to improve on the performance of their in-house help desk. With up to 4,000 employee calls per month, they struggled with timely, accurate response to customer inquiries. The company's advisors relied heavily on the help desk for everything from updating customer information to technical assistance, so slow response times and lack of immediate action were especially problematic.

AUREON™ SOLUTION



Waddell & Reed wasn't merely looking for a phone answering service. They needed a provider who was flexible, accountable and responsive, who knew the value of building and maintaining relationships. Knowing that their in-house help desk was not the solution, they turned to Aureon™ Contact Center, an experienced, respected and U.S.-based outsourced contact center, for answers.

“Aureon provides us with the responsiveness, adaptability, and work ethic that allows us to stay focused on running our business.”

**ANTHONY GOBLE, ITSM MANAGER,
WADDELL & REED**

Aureon sent a team to Waddell & Reed's Overland Park headquarters to receive training and immerse

themselves in their business, familiarizing themselves with the client's needs firsthand. From there, Aureon became Waddell & Reed's trusted contact center partner, handling all tier 1 support calls from one of Aureon's four Iowa contact centers. Working closely with Waddell & Reed to redefine their key performance indicators, Aureon Contact Center was able to provide an immediate and quantifiable impact, increasing average speed of answer, reducing abandon rates and improving immediate need services. Their flexible and adaptable solutions, coupled with their white-glove customer service, proved to be a boon to Waddell & Reed, who was now able to focus their resources and time on running their core business.

“There is immense value in working with genuine relationship builders, and Aureon really hits the mark.”

**ANTHONY GOBLE, ITSM MANAGER,
WADDELL & REED**

BUSINESS IMPACT



In Waddell & Reed's world of financial services, it's all about the numbers; and the numbers they've seen since partnering with Aureon tell the whole story. Waddell & Reed has experienced the following results:

- Average speed of answer decreased from three and a half minutes to under 35 seconds.
- Calls no longer go to voicemail.
- First call resolution was increased significantly.
- Calls answered reached an all-time high of 96 percent.

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The impact has been felt across the bottom line as well: Waddell & Reed estimate that they saved nearly 25 percent on the time and costs associated with recruiting, onboarding and managing internal staff. Thanks to the expertise and client intimacy that Aureon provides, the advisors at Waddell & Reed now work more efficiently than ever before.

For more information, visit AureonTechnology.com or call 888-387-5670.