



# Smarter Support with GenAI: Building Better Experience

## SUMMARY

Our partner, a leading player in the financial services industry, engaged the Source Allies team to address several operational challenges in their call center and broader technology environment. One priority was to reduce the volume of inquiries to their support team on their most frequently asked questions—queries that not only took a disproportionate amount of time but also required high consistency and accuracy. Training new hires to handle these calls proved difficult, as ensuring correct responses was both labor-intensive and error-prone. Compounding the issue was the need for domain-specific knowledge, which users often lacked, making self-service options unreliable. The partner also wanted to modernize the tools available to their financial planners, making workflows more efficient and scalable. With limited GenAI expertise among their internal team, we knew winning stakeholder trust in any AI-driven initiative was essential for adoption and long-term success.

## SOLUTION

We collaborated closely with their internal team to develop a generative AI solution that enables end users to independently access the most commonly requested information with minimal effort, and without needing specialized industry knowledge. We took a metrics-driven approach to ensure the solution remained accurate and user-friendly throughout development. The AI system was built with tailored agentic capabilities — prompting users for context and consistently maintaining professional, compliant communication. Trust was key, so we used structured evaluations and integrated Phoenix, an open-source tool, to monitor the system's performance. In less than four months, our partner's team was fully onboarded and equipped with the skills to manage and evolve the GenAI solution independently, ensuring the sustainability of the project.

## RESULTS

**60 Days**

Project moved from  
concept to prod  
deployment in under  
60 days

**90%**

AI solution maintained  
over 90% accuracy

**<4 Months**

Upskilled partner  
team to ensure  
sustainability <4  
months