



transversal
connecting people to knowledge

Case study



Sector:

Finance

Implementation:

Self service

Standard Life selected Transversal's IFA Answers solution to provide their network of **40,000 IFAs** with comprehensive and accurate online answers to questions relating to the upcoming Pension Simplification Scheme.

The company's two million pension customers can be confident that all Standard Life's IFAs will be able to quickly and accurately answer their questions surrounding the new pension initiative and explain how the new rules will affect them.

Transversal's IFA Answers solution uses a dynamic, self organising, self-learning knowledgebase of answers that is populated by Standard Life's staff. A simple, automated email workflow is used for creating, approving and submitting answers to the knowledgebase. Content approvers use a two click function to publish new content, which automatically relates and prioritises itself with other information in the knowledgebase. Content is instantly searchable using natural language questions, enabling IFAs to find the exact answers they require automatically online rather than calling Standard Life's advisers.



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