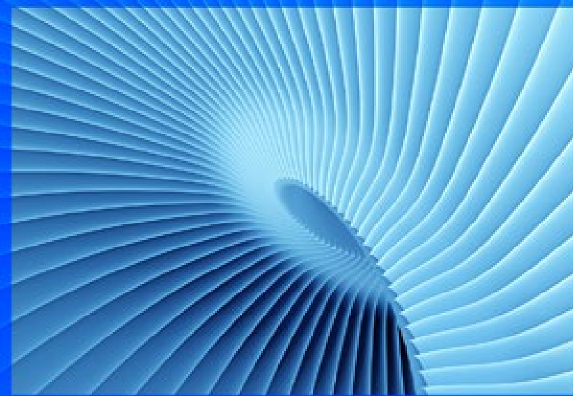
KPMG

The agentic edge



Redefining customer service in asset management

Transforming client experiences with agentic-powered solutions

In asset management, exceptional client service is not just a differentiator—it is a fundamental requirement. Advisors and investors depend on rapid, clear responses to inquiries related to transactions, product details, and regulatory guidance. The integration of agentic transformation into customer service operations is revolutionizing client interactions by reducing response times, streamlining query resolution, and offering seamless self-service.

Key challenges of traditional customer service[1]

Latency and productivity loss

Service reps spend 1–3 minutes resolving simple inquiries and up to an hour navigating complex queries across multiple systems. This decreases overall efficiency and results in suboptimal client experiences.

Inconsistent answers

High service rep turnover, varying experience levels, and the pressures of managing difficult customer interactions lead to inconsistent answers and diminished client satisfaction.

High escalation rates

Routine inquiries are escalated unnecessarily due to service reps lacking expertise or system access, increasing operational costs and creating bottlenecks in query resolution

The most time-intensive inquiries include:

- Complex transactions and fund transfers
- Distribution schedules and dividend processing
- Regulatory clarifications
- Account-specific concerns requiring multisystem verifications.

[1] *KPMG LLP, proprietary data, 07/30/2026.*

The agentic framework: A blueprint for service transformation[1]

Implementing an agentic framework in asset management service centers improves key service metrics by fundamentally redesigning service processes through an agentic lens, with artificial intelligence (AI) enabling more efficient, consistent, and scalable operations.

Metric	Before AI	After AI	Improvement
Average lookup time	1–3 minutes	5–10 seconds	**Up to 9X faster**
Response accuracy	80%–85%	93%–98%	**+10–15 percentage points**
Junior service rep productivity	Baseline	+30%–50%	**Significant increase**
Customer experience score (CSAT)	Moderate	High (consistently positive feedback)	**Marked improvement**

Four-step agentic framework for asset management service centers

An agentic-based framework optimizes client interactions through a structured, intelligent approach:

Intent detection

Automatically analyzing incoming inquiries to understand customer needs.

Intelligent routing

Directing complex queries to the most appropriate human service reps or specialized digital workflows immediately.

Rapid retrieval

Giving system interfaces the power to securely access internal policy, compliance, and client databases for rapid response times.

Compliance assurance

Building automated guardrails into every conversational interaction to guarantee adherence to rigorous regulatory standards.

Beyond efficiency improvements, agentic-driven solutions provide:

- Significant reduction in cost-per-inquiry
- Shorter onboarding and training periods for new service reps
- Enhanced customer sentiment insights through real-time analytics.

[1] *KPMG LLP, proprietary data, 07/30/2026.*

Implementation considerations for agentic-driven customer service

Successful deployment of agentic-powered service centers requires thoughtful, structured execution:

Secure knowledge base

Consolidate historical call data, prospectuses, and operational procedures into an AI-ready, secure data base.

Robust traceability

Ensure that agentic interactions are logged effectively to maintain transparency and traceability to meet compliance requirements.

Frontline coaching

Establish robust, intelligent exception handling protocols to facilitate a seamless, high-context handoff from the digital agentic capability to human service reps when human empathy or complex reasoning is needed.

Evaluation

Assess agentic responses against verified answers to detect factual errors and biases before deployment, requiring every output to reference the curated knowledge base to minimize hallucinations and maintain traceability.

Pilot and learn

Start by applying an agentic solution to FAQ-type use cases such as withdrawals and regulatory clarifications, using real call logs for training

Continuous optimization

Regularly review performance data—response times, accuracy levels, and CSAT scores—to refine agentic capabilities.

Lessons learned from recent agentic-powered customer service deployments

1

User experience (UI/UX)

Agentic solutions must prioritize intuitive interfaces to maximize adoption and client satisfaction.

2

Training service reps

Training call center service reps to effectively utilize agentic-driven frameworks is critical for seamless adoption.

3

Change management

Transitioning from legacy service models to agentic-driven systems requires clear communication and structured implementation.

Conclusion: Digital concierge service as the new standard

Agentic-powered customer service is rapidly becoming an industry standard rather than an emerging innovation in asset management. By dramatically reducing response times, improving service representative productivity, and eliminating unnecessary call escalations, an agentic approach delivers measurable, bottom-line operational benefits.

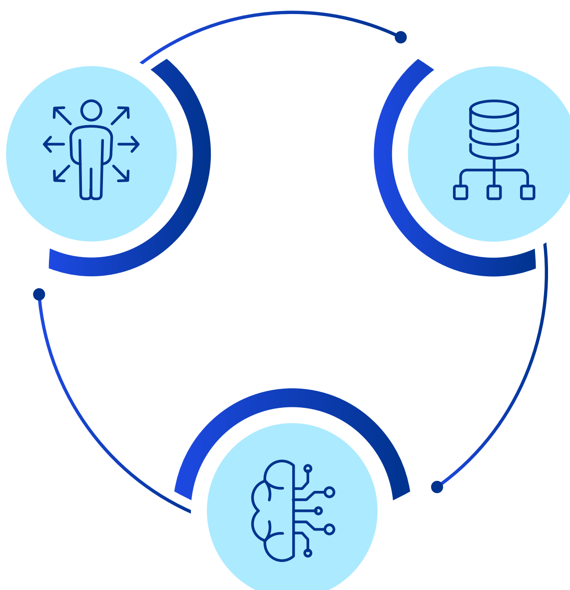
Firms that embrace agentic-driven transformation are setting new standards, while others risk falling behind. The question isn't whether change is coming—it's whether you are leading it.

How KPMG can help

With industry-leading innovation leveraging AI for asset management, KPMG LLP helps asset managers accelerate their adoption of agentic technology to drive real business outcomes.

Deep industry experience

Extensive experience helping asset managers and other financial services firms build and deploy agentic solutions for their service center operations.



Prebuilt solutions/ accelerators

Our industry subject matter professionals have built agentic AI solutions and accelerators for asset management service operations, which are tried and tested, accelerating time to value.

Leading AI alliances

Our leadership in enterprise AI is strengthened by a robust ecosystem of strategic alliances. Through these alliance relationships, we collaborate closely with leading AI innovators and their technical specialists to develop innovative solutions that help address our clients' most complex business challenges. By leveraging a broad range of AI capabilities and technologies, we help ensure we bring the right solutions to meet each client's unique needs.

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