

BOSTON FINANCIAL KnowledgeBase

keeping knowledge current

... and flowing

delivering

the *right information*

at the *right time*

to the *right people*

to better service your customers

Improves quality and speed of responding to investor inquiries

Boston Financial has embraced knowledge management as a critical practice for providing consistent, high quality service to our clients and their investors. Our knowledge management journey has led us to extract deeply held, highly individualized knowledge about our processes and procedures, and regulations. We've embedded this collective knowledge in a tool that distributes the right information to the right people at the right time.

Enhances and simplifies associate training

being in the know is easy...

Delivers information in a consistent, intuitive, easily-accessible format

Our best representative used to be the one who knew all the answers; today, the best representative is the one who can access information and communicate the answers most effectively. Our knowledge management tool has dramatically transformed the role of our Customer Service Representatives who now have access to a "knowledge database" to help them retrieve the information they need to be as effective and efficient as possible. By cataloging our collective knowledge assets and delivering information in a convenient, accessible format, our knowledge tool enables associates to resolve inquiries faster and enhance service to your customers. We are excited about the potential benefits this new tool will provide to our clients in 2009.



BOSTON FINANCIAL
DATA SERVICES®