

8x8[®]

Connecting Advisors and Clients Through Secure Voice Workflows

Unified Communication for
Investment Services with
8x8 Voice





Investment advisory is built on trust, and trust depends on communication that is fast, clear, and secure. When a client cannot reach their adviser during a market shift, or when a compliance record is incomplete, the cost extends well beyond a single conversation.

The Communication Gap Putting Client Relationships at Risk

The numbers reveal how serious the problem has become. Globally, 67% of [corporate, institutional, and commercial banks](#) have lost clients due to inefficient communication processes. At the same time, global consumers expect financial services firms to deliver personalized communications.

In the APAC region, the pressure is amplified. The wealth management market is projected to reach [US\\$50.80 trillion by 2030](#), yet [66% of financial services engagement](#) leaders report that clients are not opening or reading communications from their institutions. Firms that cannot close this gap risk losing clients to those that can.

8x8 Voice API: Secure, Scalable Communication for Investment Firms

The [8x8 Voice API](#) gives investment firms programmable voice capabilities they can embed directly into client-facing and internal workflows, without managing telephony infrastructure. Advisers connect from any device, compliance is built in, and auditability can be enabled with configurable logging and recording.

- **Crystal-Clear Voice Quality**
High-definition audio ensures advisers and clients communicate without distortion or dropped calls, essential when discussing portfolio strategies or time-sensitive market updates.
- **Security and Compliance Features**
Call recording, encrypted calling, retention policies, and audit-ready event logs keep firms aligned with financial services regulations without adding manual overhead.



- **Any-Device, Anywhere Connectivity**

Advisers can connect via PSTN, SIP, WebRTC, or mobile from any location, supporting hybrid and remote advisory models without relying on legacy systems.

- **Intelligent Call Routing**

Configurable IVR menus, forwarding rules, and escalation logic ensure every client call reaches the right adviser promptly, even during peak market volatility.

- **Actionable Communication Analytics**

Insights from platforms like 8x8 Connect provide visibility into call performance and service levels, helping firms continuously improve client experience.

Make Every Client Conversation Count

Voice communication is not a support function for investment firms; it is core to how trusted financial advice gets delivered. With 8x8 Voice API, firms gain the speed, compliance infrastructure, and scalability to serve clients at the standard they expect.

Continue reading the full article here:

[Communication for Investment Services: How 8x8 Voice Powers Modern Advisory Firms](#)