

## IMPLEMENTATION CASE STUDY

# Driving quality assurance efficiency with NLP-powered innovation

**Aveni is working closely with one of the UK's leading equity release advisory firms to transform its Quality Assurance monitoring capabilities with enhanced coverage, speed and accuracy.**

## Age Partnership

Age Partnership is one of the UK's leading equity release advisory firms. It's the only equity release advisor of its size to provide multi-product advice covering later life lending options to find the right solution for its clients.

Age Partnership places client experience and outcomes at the forefront of its priorities. Each client's unique situation is carefully assessed, and the firm finds the best product and plan for their individual requirements. This unwavering commitment to client-centric practices reflects the company's steadfast dedication to its core values and forward-thinking approach to fintech innovation.

## The challenge

The time taken for a quality assurance (QA) assessor to review a call manually can be lengthy. An assessor might also listen to a whole call which may contain no issues. Age Partnership's QA and compliance teams were looking for a solution to address several areas: speed up their QA process, increase oversight of client interactions, and provide data-

led evidence of compliance to meet FCA Consumer Duty regulations. They needed something that was easy to use, could be integrated with their existing in-house CRM system, and that would provide them with actionable insights following a QA assessment.

## The solution

Age Partnership implemented Aveni Detect, an AI solution that uses natural language processing (NLP) to automate the QA process. Aveni Detect listens to and transcribes calls, identifies key phrases and topics, and flags any potential issues, allowing Age Partnership's QA team to focus on the most important aspects of calls and quickly identify any potential problems for further action.

Age Partnership's QA, Compliance and IT telephony teams worked closely with Aveni to implement Aveni Detect, ensuring it integrated seamlessly with the CRM system. Set-up was fast with Age Partnership able to access the platform to port in calls in a matter of weeks.

After training, Age Partnership's dedicated super-users met with

Up to **30%**  
faster to complete a  
fact find review

**75%** automation  
target in 6 months

**2** weeks set-up to  
begin uploading calls

**AI**

Aveni's customer success team on a weekly basis to ensure a smooth on-boarding process and provide an opportunity to quickly address any questions from users. It also allowed Age Partnership to learn more about the platform and its capabilities, and continue to update its Supervisors on progress and results.

## The results

Close communication between the Aveni and Age Partnership teams has meant a speedy and smooth implementation of Aveni Detect. Feedback from users is that the platform is easy to use, with it resulting, in some cases, up to **30% faster review time**. Time savings were attributed to features such as machine checks of certain QA questions as well as the ability to quickly and easily navigate calls, pinpointing areas of interest on the searchable transcription through the use of timestamps.

Aveni Detect has also helped Age Partnership gain greater visibility and oversight, especially from a Consumer Duty standpoint. It allows their compliance teams to provide additional evidence to the regulator on how they're identifying vulnerable customers.

Gavin Syson, Head of QA from Age Partnership, explains the next stage is, "to build the confidence of all Supervisors to navigate around the calls to make full use of the system, which will further increase efficiency and allow us to concentrate on key suitability issues."

On choosing Aveni, Gavin continues, "Working with Aveni has been a pleasure. Communication and regular meetings throughout the implementation process have been excellent and it has been easy to catch up on an ad hoc basis when required. They're an exceptionally knowledgeable team with a can-do attitude which is invaluable when deploying tech solutions of this nature."

## What's next?

Age Partnership is now looking to roll-out Aveni Detect to its Mortgage and Wealth departments as well as:

- Use the adviser dashboard to capture the monitoring undertaken on the cases that its QA team doesn't review, therefore enhancing coverage by providing a degree of monitoring on all cases.
- Build the remaining QA questions into the process
- Add suitability report checking
- Introduce Sales managers as users to review adviser metrics such as talk time and pace to improve performance and reporting

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**Gavin Syson, Head of QA,  
Age Partnership**