

SS&C Tier1 Bloomberg Agent Actions

An AI Agent that reads every Bloomberg Chat so your CRM doesn't have to

Nearly half of your most valuable client conversations happen on Bloomberg Instant Messaging. The Agent brings every one of them into your CRM so you can:

- Gain complete client relationship visibility
- Capture every commercial opportunity
- Eliminate manual reporting burdens
- Stay audit and regulation ready

The Solution

Every Bloomberg interaction that doesn't reach your CRM is a conversation that can't support your next commission allocation or CSA submission. The Agent ensures nothing is left on the table.

SS&C Tier1 Bloomberg Agent uses Agentforce, Salesforce's AI technology to automatically transform Bloomberg chat activity into structured, CRM-ready intelligence.

From Blind Spots to Captured Value

WITHOUT THE AGENT

No CRM record when trades, mandates, or research requests are initiated in chat

Sales and analysts spend hours manually logging Bloomberg interactions

No way to reconstruct the full client conversation record in an audit

WITH THE AGENT

Every trade, mandate, and research request captured as a clean CRM interaction

Interactions logged automatically with zero manual effort

Complete, audit-ready conversation record always on hand

Meet the Agent:

- 1. READS** every Bloomberg IM, in real time, hundreds of thousands of chat rows a day
- 2. UNDERSTANDS** trader shorthand, tickers, and context the way a human analyst would
- 3. RESOLVES** shorthand and aliases to the correct account and contacts. No lookup required
- 4. DECIDES** which 200–300 conversations actually matter, and files them as clean CRM records

The Agent supports both native Salesforce and Tier1-managed deployment models, giving your team flexibility to choose the integration path that best fits your existing technology stack.

Agent Actions:

- Processes hundreds of thousands of Bloomberg chat rows daily
- Automatically creates clean, audit-ready interactions in Salesforce
- Resolves trader shorthand and aliases to the correct accounts and contacts
- Extracts tickers, sentiment, topics, and client intent
- Eliminates manual data entry and reporting
- Filters hundreds of thousands of daily chat rows down to the 200–300 interactions that actually require attention—without a single manual step

Business Impact

- More complete CRM coverage
- Higher-quality client intelligence
- Improved relationship management
- Greater revenue and monetization opportunities
- Stronger compliance and audit readiness

Seamless Adoption

- No new user interface
- No workflow changes
- No manual entry
- No disruption to existing processes

KEY BENEFITS

Complete Relationship Visibility

Create a true 360° view of every client interaction across channels.

Protect Your Broker Vote and Wallet Share

Capture previously invisible conversations and convert them into actionable CRM intelligence.

Increase Sales Productivity

Reduce administrative work and allow teams to focus on client engagement.

Improve Data Quality

Ensure consistent, structured, and audit-ready records in Salesforce.

Close the Bloomberg Retention Gap

Unlock historical client engagement data that would otherwise remain inaccessible.



Ready to See What the Agent Finds?

Discover the value hidden in your Bloomberg conversations. Contact your SS&C Tier1 Account Executive today to schedule a Bloomberg Agent Proof of Concept (POC).