

Next Best Topic

Personalized Conversations with Financial Advisors

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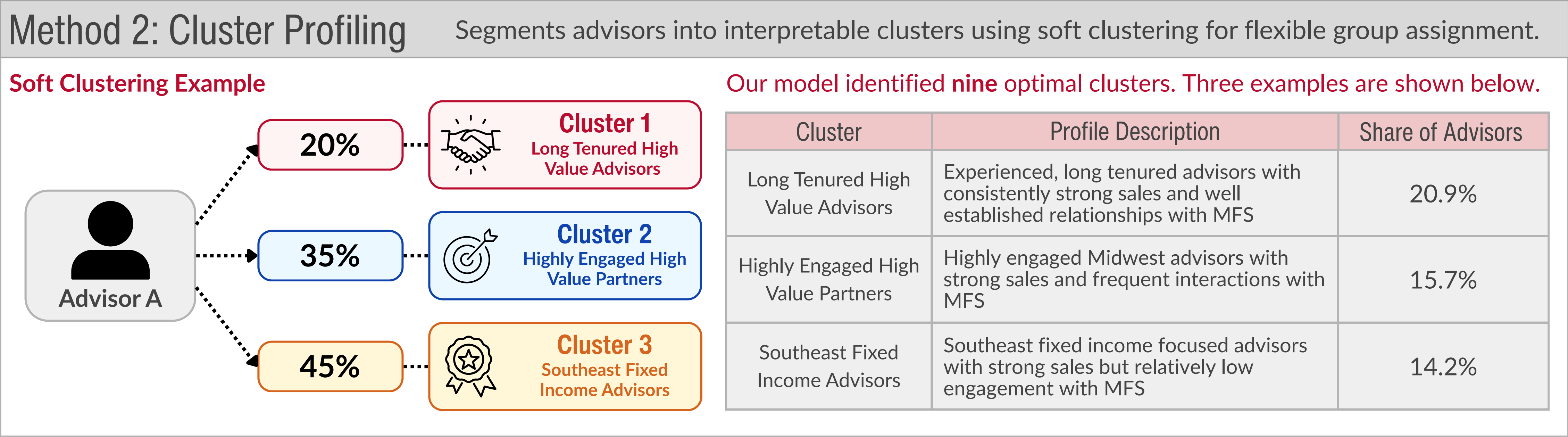
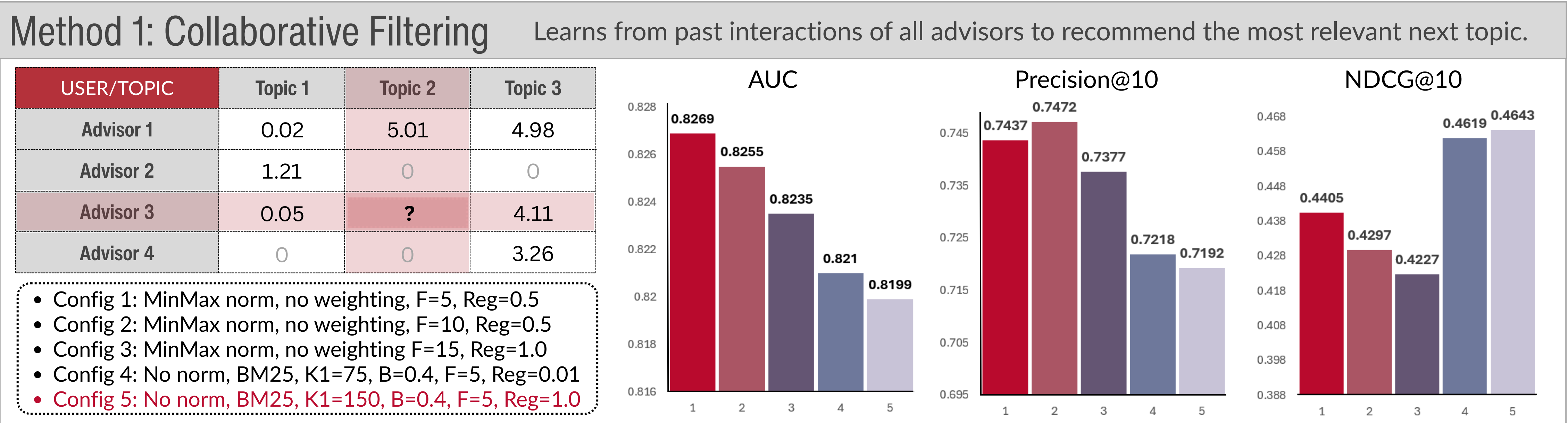
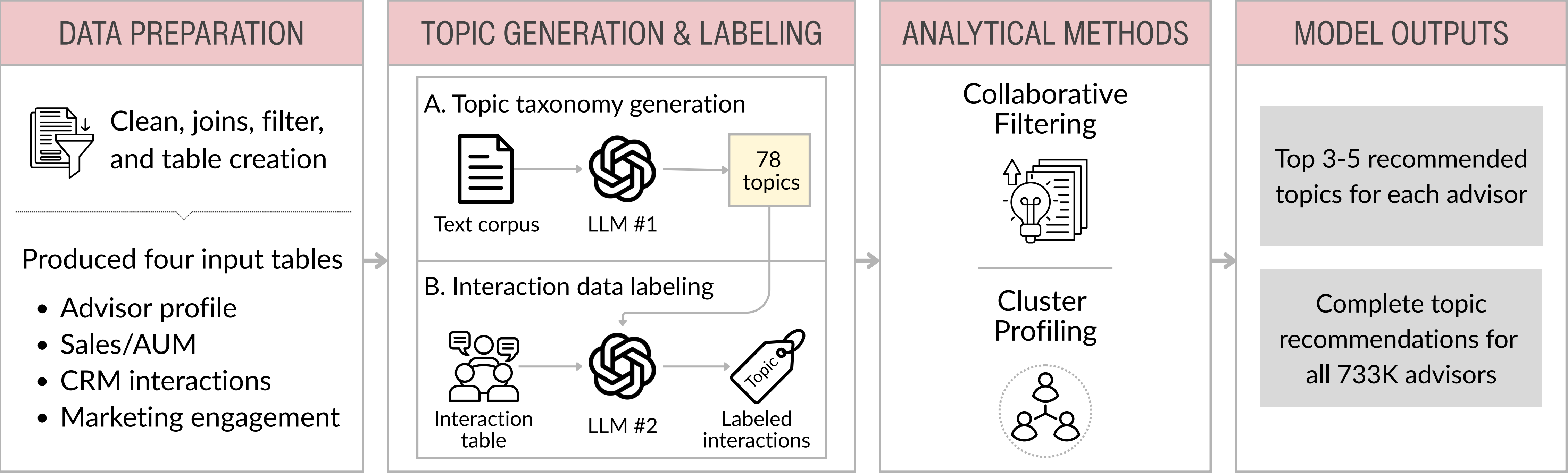
1. PROBLEM STATEMENT

- Each MFS sales representative manages relationships with **4,000+** financial advisors in the U.S. retail market
- Currently no systematic use of past interactions to guide future conversations (relies on expertise and intuition)

2. BUSINESS OBJECTIVE

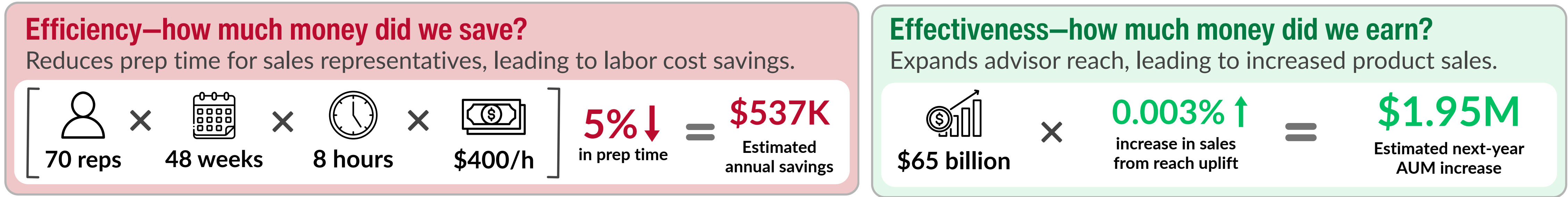
Our goal is to develop a data-driven recommendation engine that identifies the **Next Best Topic** for each financial advisor, enabling more personalized conversations and strengthening MFS’s relationship with advisors.

3. ANALYTICAL METHODS & RESULTS



4. BUSINESS IMPACT

Translating project outcomes into meaningful business value for the broader MFS Distribution Team.



5. FUTURE WORK & IMPROVEMENTS

- Model Comparison:** compare model performance by gathering user feedback and validate results through A/B testing
- Model Enhancement:** explore hybrid and ensemble models to further improve the robustness of recommendations
- Expand Topic Taxonomy:** incorporate additional data sources and expand the taxonomy to cover a broader range of financial topics