
The Day Trading Firm's Guide to Agentic AI

From an enquiry desk that cannot keep pace with a global, around-the-clock market to a digital worker that answers every enquiry, qualifies every lead, and knows exactly where the advice line sits.

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— FOREWORD

The market never closes. Your desk does.

More than 7.7 million Australian adults, around 38% of the adult population, held on-exchange investments such as shares and exchange-traded funds in 2023, up from 6.6 million three years earlier.¹ Behind that headline sits a louder, faster world: retail traders moving in and out of foreign exchange, futures, contracts for difference (CFDs) and crypto across every session of the global clock. Day trading, the practice of buying and selling within a single session to profit from short-term price moves, sits at the most active and most leveraged end of it.

The firms that serve those traders, the proprietary and funded-trader firms, the academies, the brokers, are not short of demand. They are short of capacity at the one point where demand arrives: the enquiry. A prospective trader compares three firms at midnight while the United States session runs. An applicant stalls halfway through verification. A funded trader has a question about a payout. Each is a moment where attention is for sale to whoever answers first, and most of them land when the desk is closed or already underwater.

This guide is about a specific, practical answer to that problem: an agentic artificial intelligence (AI) voice agent that works the enquiry desk and the routine administration around it, so your people can do the parts of the job that genuinely need a person. It is written for the owners and operators of trading firms who want to understand what this technology does, what it must never do, and how to put it to work without straying across the line that the Australian Securities and Investments Commission (ASIC) polices most closely.

We have tried to be honest throughout. There is a clear line we keep returning to, the line between giving information and giving financial advice, and a good deal of this guide is spent making sure the technology stays firmly on the right side of it.

Brad Riley

CEO, Agntic.ai

1. Australian Securities Exchange (ASX), Australian Investor Study 2023. The ASX reports around 7.7 million Australian adults held on-exchange investments, up from 6.6 million in 2020.

WHAT IS INSIDE

Contents

01	Agentic AI, in plain language	06
	What a digital worker is, how it differs from a chatbot, and the one thing it must never do.	
02	A day on the enquiry desk	09
	The hidden cost of an always-on market, told the way your desk lives it.	
03	The five jobs it does best	12
	Where an AI voice agent earns its place at a trading firm.	
04	What a slow enquiry desk really costs	15
	The four quiet leaks, totalled.	
05	The advice line, privacy and compliance	17
	General information, personal advice, and the boundary ASIC enforces.	
06	Under the bonnet	21
	How a digital enquiry desk actually works, in six parts.	
07	Before you switch it on	23
	The groundwork that makes the difference.	
08	Building the business case	25
	An illustrative model for leads, onboarding and hours.	
09	What you don't need	27
	The myths worth retiring before you start.	
10	In practice	29
	Three composite firms and what changed.	
11	Questions trading firms ask	32
	The honest answers to the common ones.	
12	Your first seven days	35
	A short, concrete path to a live agent.	

Agentic AI, in plain language

Before the benefits, the basics. What a digital worker is, why it is different from the chatbots you have already met, and the single boundary that makes it safe to use in a regulated market.



THE IDEA

A worker, not a chatbot.

You have used generative AI already. You type a question, it writes you an answer, and the conversation ends there. It is a clever tool, but it waits for you and does nothing on its own.

Agentic AI is the next step. An **agent** does not just talk. It is given a goal, a set of rules and access to the tools it needs, and it carries the task through from start to finish. For a trading firm, the goal is usually simple to state: answer the enquiry, understand what the person needs, and complete the request, whether that is qualifying a lead, moving an applicant through verification, or resolving a support question, the same way a capable desk officer would.

That is why we call it a **digital worker** rather than a chatbot. It speaks naturally on the phone and in chat, it listens, it asks the follow-up questions your team would ask, and then it acts: it logs the lead in your customer system, routes it to the right desk, sends the next step, and answers the routine questions from your own published rules. When something falls outside those rules, it hands over to a person.

A chatbot answers. A digital worker finishes the job, then knows when to step back.

The difference matters most outside business hours. A chatbot on your website might capture a message overnight. A digital enquiry desk actually picks up at 2am during the United States session, holds a real conversation with a prospect comparing you against two competitors, qualifies them, and books the next step before your team logs in.

None of this replaces your team. It removes the repetitive, interruptive work that stops your people from doing the parts of the desk that genuinely need a person: the judgement calls, the complex account, the conversation that has turned sensitive.

THE ONE RULE

What it must never do.

A digital enquiry desk at a trading firm is built around a boundary that does not exist in most other businesses. It handles the information and administration around your products. It does not, under any circumstances, give financial advice.

That means it does not recommend a product, a market or a strategy. It does not tell a caller whether they should trade, or how much. It does not predict prices, and it never implies a likely or guaranteed return. If a caller starts asking for a recommendation, the agent's job is not to give one. Its job is to recognise the moment, give the general advice warning your licence requires where relevant, and hand the conversation to a licensed person.

THE LINE, IN ONE SENTENCE

The agent gives information and handles process. Financial advice always belongs to a licensed person. It can explain how your product works, what it costs and what the rules are. It will not cross from general information into personal advice, because that is the line ASIC enforces and the one that protects both your licence and your customers.

This is not a limitation we apologise for. It is the design. A firm that adopts this technology should be able to say, hand on heart, that no prospect was ever advised, steered or promised a return by a machine. Everything in the rest of this guide is built on top of that promise, and Section Five sets out exactly how it is enforced.

A day on the enquiry desk

The cost of a desk that cannot keep pace with a global market does not appear on any report. It shows up as a cold lead, a half-finished onboarding and a prospect who quietly chose a competitor. Here is the day as your desk actually lives it.



SAM'S DAY · A MID-SIZE FUNDED-TRADER FIRM

A global market, a single timezone.

Sam runs the sales and support desk. The firm sells funded-account challenges to traders worldwide. The desk works one timezone's hours. The market does not.

OVERNIGHT (THE UNITED STATES SESSION)

- 1:40 A prospect in three browser tabs compares your challenge against two rivals. Your live chat is a contact form. One rival answers in seconds. The form is read at 9am.
-
- 3:15 An applicant stops halfway through identity verification, unsure which document to upload. No one is there to nudge them. The application sits, then expires.

THE TRADING DAY

- 8:05 **Inbox triage.** Forty overnight enquiries, mixed in with payout questions and platform tickets. Sam answers the loudest first, not the most valuable first.
-
- 11:20 A funded trader's payout query waits ninety minutes for a reply. By the time Sam answers, the trader has posted about the delay in a public forum.
-
- 2:30 **Follow-ups.** Sam meant to chase yesterday's stalled applicants. A fresh wave of enquiries arrives. The list rolls to tomorrow, again.
-
- 6:10 The desk closes. From now until morning, every enquiry meets a form or a recording, while the most active trading sessions of the global day are only just beginning.

THE INVISIBLE COST

None of it was anyone's fault.

Sam is good at the job. The firm is well run. And yet by the end of the day a handful of prospects went elsewhere, a few applications quietly expired, and a paying customer was left waiting long enough to complain in public.

This is the trap of enquiry-desk work. The losses are real but invisible. A lead that goes cold is not recorded as a lost lead; it is simply a form that was answered too late. A stalled onboarding does not announce itself; it just sits until it expires. A slow support reply looks like one impatient customer, not like the slow erosion of trust that decides whether they renew.

Because nobody can see the cost, nobody can justify staffing against it, and the desk is asked to absorb a little more each year. The work that gets dropped is always the same work: the overnight enquiries, the follow-ups, the patient chase. The work, in other words, that a digital enquiry desk is built to pick up.

The rest of this guide is about handing that specific layer of work to an agent, so the next day looks different: every enquiry answered, every lead qualified the moment it arrives, every stalled applicant nudged, and Sam free to do the human part of the job properly.

The five jobs it does best

Not everything should be automated, and a good deal of the desk never will be. These five jobs are where an AI voice agent is genuinely strong, and where trading firms see the change first.



— WHERE IT EARNS ITS PLACE

Five jobs, done properly, every time.

JOB 01**ANSWERED**

Answering every enquiry, every hour

Every call and chat picked up on the first ring, at every hour, including the overnight sessions when most of the global market is awake. No queue, no form, no prospect lost to the firm that answered first.

JOB 02**QUALIFIED**

Qualifying and routing leads

The agent asks your qualifying questions, captures what your team needs, and routes the lead to the right desk in your customer system, so a person picks up a warm, sorted enquiry rather than a cold form.

JOB 03**ONBOARDED**

Onboarding and verification intake

It walks a new applicant through registration and the know your customer (KYC) steps, explains which document is needed, and chases the ones who stall, so applications complete instead of expiring overnight.

JOB 04**SUPPORTED**

Account, payout and platform support

Routine questions about fees, rules, payouts, account status and how the platform works, answered from your own policies, around the clock, with anything unusual passed cleanly to a person.

JOB 05**FOLLOWED UP**

Following up the prospects who stalled

The slow, repetitive outreach that always gets dropped first: the applicant who paused at verification, the lead who asked one question and went quiet, the trader whose subscription is about to lapse. The agent works the list patiently and without fail, and hands a genuine conversation to a person when one is wanted.

 WHY THESE FIVE

High volume, low judgement, high stakes on speed.

The jobs worth handing over share a shape. They happen often, they follow rules you already have, and getting to them quickly is what wins the customer. That is precisely the shape an agent handles well, and where a person is wasted waiting for the next form to land.

7.7m

Australian adults held on-exchange investments in 2023, around 38% of the population and up from 6.6 million in 2020. Demand is large and still growing.

ASX AUSTRALIAN INVESTOR STUDY 2023

21x

more likely a lead is qualified when first contacted within five minutes rather than thirty. On the enquiry desk, speed is the product.

LEAD RESPONSE MANAGEMENT STUDY (INSIDESALES / MIT)

47 hrs

is how long the average business takes to follow up a web enquiry, and 58% never respond at all. The gap an always-on agent closes.

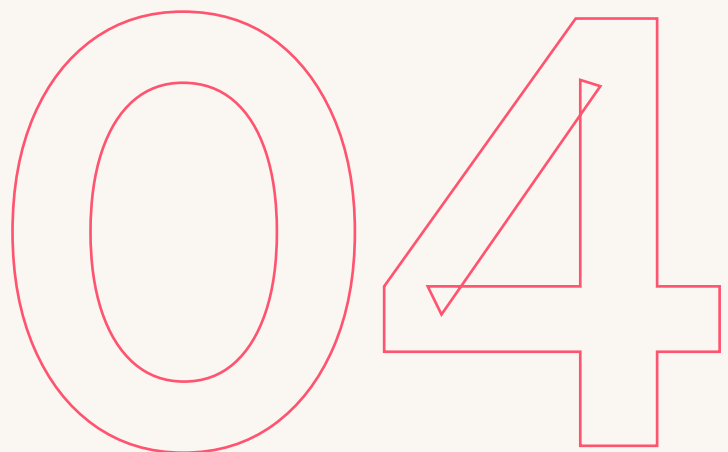
INSIDESALES LEAD-RESPONSE BENCHMARK RESEARCH

Read those numbers together and the case is straightforward. Demand is not the problem. The problem is the narrow set of moments where a prospect reaches out and waits, or reaches out overnight and meets a form. Hand those moments to an agent and you keep the business you were already winning, instead of handing it to whoever replied first.

Sources: ASX, Australian Investor Study 2023. Lead Response Management Study, Prof. James Oldroyd with InsideSales.com and the Massachusetts Institute of Technology (MIT), widely cited finding that contacting a lead within five minutes makes qualification around 21 times more likely than at thirty minutes. Follow-up timing: InsideSales.com lead-response benchmark research; see also Harvard Business Review, "The Short Life of Online Sales Leads," 2011.

What a slow enquiry desk really costs

A single late reply feels like nothing. A handful of them, every day, for a year, is a different story. Here are the four quiet leaks, and what they add up to.



— THE LEAKS LEDGER

Four leaks, one total.

The weekly figures below are illustrative drivers for a mid-size trading firm, not a quote. Every firm's numbers differ. The value of laying them out is that the leaks stop being invisible. We assume an average value of \$300 for a converted enquiry.

<p>Leads that go cold before first contact</p> <p>~10 a week who would have converted, lost because a competitor replied first while the form sat unread (\$300 each).</p>	\$3,000 /wk
<p>Overnight enquiries lost</p> <p>~8 a week arrive during the global sessions after the desk closes; the motivated ones sign up elsewhere by morning.</p>	\$2,400 /wk
<p>Stalled onboardings never recovered</p> <p>~6 a week begin verification, pause, and expire because nobody nudged them through the next step.</p>	\$1,800 /wk
<p>Slow support, lost renewals</p> <p>Existing customers who do not renew or upgrade after a poor support experience, valued conservatively.</p>	\$1,200 /wk
The combined leak	\$8,400 /wk

That is roughly \$400,000 a year leaking quietly through four holes, none of which shows up on an invoice. You do not need these exact numbers to act; even at half the assumptions the annual cost dwarfs the price of closing it. A digital enquiry desk addresses all four at once: it answers the leads that would go cold, it works the overnight sessions, it chases the stalled applications, and it keeps support fast. Section Eight builds the full model with your own numbers.

Speed-of-response basis: Lead Response Management Study (InsideSales / MIT) and InsideSales benchmark research, cited in Section Three. Converted-enquiry value of \$300 is illustrative and rounded; replace with your own.

The advice line, privacy and compliance

This is the section that matters most for a trading firm, and the one most guides skip. Where general information ends and financial advice begins, how personal data is protected, and exactly how the agent is kept on the right side of the line ASIC enforces.



INFORMATION IS NOT ADVICE

The line ASIC enforces.

In Australia, the moment you give financial product advice to a retail client you enter a regulated activity. Advice is split in two. **Personal advice** is given when you have considered, or a reasonable person would expect you to have considered, the client's objectives, financial situation or needs. All other financial product advice is **general advice**. Both require an Australian financial services (AFS) licence or an authorisation under one; personal advice also triggers a general advice warning, a statement of advice (SOA) and the best interests duty.²

This is not a theoretical concern for the firms that serve day traders. ASIC has made the sector a priority. In its January 2026 report on CFD issuers it found that 133,674 retail clients lost money trading contracts for difference in the 2023 to 2024 financial year, with net losses of more than \$458 million including \$73 million in fees, and that only 32% of retail clients were profitable after fees.³ Alongside that work, ASIC has run a sustained crackdown on so-called finfluencers who promote high-risk products such as CFDs, or who suggest guaranteed returns, while providing unlicensed advice.

A digital enquiry desk has to be built to that standard, not retrofitted to it. The agent stays on factual, published ground: how your product works, what it costs, what the rules are, how to complete a step. It does not recommend, predict or promise. The moment a conversation turns toward what a person should do with their money, the agent recognises it, gives the warning your licence requires where relevant, and hands over to a licensed human.

The safest desk is one that never has to guess where the advice line is, because the line is written into how it works.

Consistency is the point. A human desk under pressure at 2am might stray across the line to be helpful. The agent will not, because it has no incentive to and every rule against it. Every word it says is logged, so you can show exactly what was and was not said, on any enquiry, at any hour.

2. ASIC Regulatory Guide 244, Giving information, general advice and scaled advice; RG 175, AFS licensing: Financial product advisers; Corporations Act 2001 (Cth) s766B. 3. ASIC, Report 828, "Risky business: Driving change in CFD issuers' distribution practices," 20 January 2026.

THE BOUNDARY, ENFORCED

How the line is held.

Section One set the rule: the agent gives information, never financial advice. This is how that rule is enforced in the way the agent is actually built.

THE AGENT WILL

- + Explain how your product, challenge or course works, and what it costs

- + Walk a person through your published rules, eligibility and verification steps

- + Give the general advice warning where your licence requires it

- + Recognise a request for a recommendation and hand it to a licensed person

- + Log every conversation in full for review

THE AGENT WILL NOT

- Recommend a product, market or strategy to a person's circumstances

- Predict prices or imply a likely return

- Promise, guarantee or hint at profits

- Tell a caller whether they should trade, or how much

- Cross from general information into personal financial advice

HUMAN IN THE LOOP

A licensed person is never removed. The agent is a layer in front of routine information and administration, with clear escalation paths back to your team and a standing instruction to hand over the moment a conversation turns to advice. You set the rules; the agent keeps to them; you can see everything it did.

PRIVACY AND GOVERNANCE YOU CAN SHOW

Built to be inspected.

Trading firms collect sensitive material: identity documents, financial details, the personal information gathered during onboarding. Under the Privacy Act 1988 (Commonwealth) and the thirteen Australian Privacy Principles (APPs), that information must be collected only for a clear purpose, with consent, and held securely. The agent tells people plainly that they are speaking with an automated assistant, collects only what the task needs, and handles it under your own privacy policy.

That framework is tightening. The Privacy and Other Legislation Amendment Act 2024 began the most significant overhaul of the Act in its history. From 10 December 2026 it requires organisations to disclose in their privacy policy when decisions that significantly affect a person are made by substantially automated means. A firm using an AI agent should plan for that disclosure now rather than scramble for it later.

Because every interaction is logged, transcribed and summarised, you have a clearer record of front-line activity than most firms keep today, when a phone call leaves no trace at all. That record supports the obligations you already meet: your licence conditions, your design and distribution obligations (DDO), your handling of personal information under the APPs. If you decide the agent should never discuss a particular topic, or should always escalate a particular kind of enquiry, that change is made once and applied to every conversation from then on.

This guide is general information, not legal, financial or compliance advice. Before you go live, your own licence conditions and privacy obligations should be confirmed with the appropriate adviser. What the technology gives you is an enquiry desk that is easier to govern, not harder.

Under the bonnet

You do not need to be technical to use this, but it helps to know what is happening when an enquiry lands. Here is the whole thing, in six parts.



HOW IT WORKS

Six parts, one conversation.

PART 01**It answers and identifies itself**

The agent picks up by phone or chat, on the first ring, and tells the person they are speaking with your firm's automated assistant. It understands ordinary speech, accents and interruptions.

PART 03**It qualifies and routes**

It asks your qualifying questions, captures what a person needs, and routes the enquiry to the right desk, so a human picks up something warm and sorted rather than a cold form.

PART 05**It holds the advice line**

When a conversation turns toward a recommendation, it gives the general advice warning where required and hands over to a licensed person. It never offers advice, a prediction or a promise itself.

PART 02**It works from your rules**

Your products, fees, eligibility, published terms and the advice line: it works from the rules you set, in plain language, not from guesses about markets or returns.

PART 04**It writes to your systems**

It connects to your customer system, onboarding and ticketing tools through permissioned access, logs the conversation, and moves the applicant or ticket to the next step. No double entry.

PART 06**It reports back**

Every conversation is logged, transcribed and summarised. You see volumes, outcomes and anything escalated, and you tune the rules from there.

Before you switch it on

You can stand up a working agent quickly. The firms that get the most from it spend a little time first, getting the groundwork right. Here is what to map.



— THE GROUNDWORK

An hour of mapping saves a month of patching.

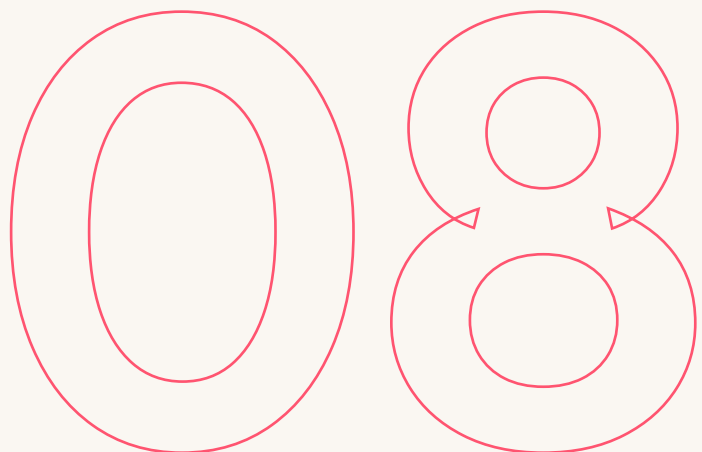
Getting an agent live is fast. The difference between a good launch and a frustrating one is whether you have written down the things your desk currently holds in its head. Work through this list before you go live.

- Your top ten reasons people contact you, in order
- Exactly where general information ends and advice begins, for your licence
- What must always go to a licensed person, and to whom
- Your payout, refund and account policies
- Which systems the agent may read and write
- Your products, fees and eligibility rules in plain language
- The general advice warning wording you are required to use
- Your onboarding and verification (KYC) steps, in order
- Consent and privacy wording for collecting personal information
- Who owns the agent's rules and reviews its reports

This is a short piece of work, not a project. Most of it is writing down decisions you have already made informally. Once it is on paper, the agent can be configured to match exactly how your firm already runs, which is the whole point: it should sound and behave like your desk, on its best day.

Building the business case

An illustrative model, not a promise. Plug in your own numbers and the shape of the return tends to hold: it pays for itself on captured leads alone, before you count the hours.



— AN ILLUSTRATIVE MODEL

Where the return comes from.

A worked example to show the mechanism, not a quote. The numbers are illustrative and rounded; replace them with your own. The point is that the returns stack, and the first one usually covers the cost by itself.

THE SCENARIO · A MID-SIZE TRADING FIRM

Takes roughly 600 enquiries a week across sales and support, spanning every global session, with the desk staffed mainly in one timezone's business hours. Average value of a converted enquiry, conservatively, \$300. We assume forty-eight working weeks in the year.

Where the return comes from	Illustrative annual figure
Captured and qualified leads ~10 leads/wk that previously went cold or arrived overnight, now answered within seconds × \$300 × 48 weeks. The biggest line, and after-hours enquiries alone often cover the fee.	\$144,000
Recovered onboardings ~5 stalled applications/wk chased through verification to completion instead of expiring × \$300 × 48 weeks.	\$72,000
Desk hours returned About 15 hours/wk no longer spent on repetitive enquiries and follow-up chasing, valued at a fully-loaded rate. Capacity, not cash, but real.	\$30,000
Cost of the agent Indicative annual platform cost for a firm of this size, plus the groundwork time in your first fortnight.	(\$24,000)
Net illustrative return Recovered revenue and returned hours, less the cost of running it.	\$222,000

Read it conservatively and the case still holds. Halve every assumption and the model clears the cost of the agent several times over, on captured leads alone, before the returned hours and the better customer experience are counted. We will build this with your real numbers in a short call rather than ask you to take a generic figure on faith.

What you don't need

Some of what holds firms back is not cost or risk, but a set of assumptions that are simply not true. Here are the ones worth retiring before you start.



— MYTHS WORTH RETIRING

Less than you think.

YOU DON'T NEED

- To replace your sales and support team. The agent takes the repetitive layer, not the people

- To let it anywhere near financial advice. By design, it stays in general information

- To rip out your customer or onboarding systems. It connects to what you already run

- To be technical. The rules are written and changed in plain language

- A long IT project. A working agent is a matter of days, not quarters

YOU DO NEED

- + A clear picture of why people contact you, and your published rules

- + Agreement on exactly where the advice line sits

- + Your privacy and consent wording confirmed

- + One owner inside the firm who watches the reports

- + A willingness to start with one job and grow from there

The honest summary is that the barrier is smaller than the reputation of "AI in a regulated market" suggests. You are not rebuilding your firm. You are adding a reliable, well-governed layer to the enquiry desk and keeping a firm hand on what it is allowed to do.

In practice

Three composite firms, drawn from the kinds of deployments this technology suits. The names are illustrative; the situations are not.



COMPOSITE CASE STUDIES

What changed, and how fast.

COMPOSITE ·
FUNDED-TRADER FIRM

A challenge-based prop firm

Global customer base, most enquiries arriving outside local hours.

Overnight

enquiries now answered and qualified instead of lost to morning

The overnight window, kept.

The firm's busiest enquiry hours were the worst covered, the overnight sessions when prospects compared it against rivals. The agent now answers every chat and call at those hours, explains how the challenge works, and books the next step.

Within the first fortnight the stalled-application list, which had been quietly expiring, was worked through by the agent in the quiet hours, and the team noticed more completed onboardings arriving by morning.

COMPOSITE · TRADING
ACADEMY

An education and coaching business

High lead volume from social campaigns, slow to first contact.

5 min

from enquiry to a qualified first response, every time

The cold lead, warmed.

Leads poured in from campaigns but waited hours for a reply, by which point most had moved on. The agent now responds within minutes, answers factual questions about the course and fees, qualifies the lead, and hands a warm conversation to a coach, without ever straying into advice about whether the person should trade.

COMPOSITE ·
MULTI-PRODUCT BROKER

A retail brokerage

Shares, foreign exchange and
CFDs, one shared support line,
inconsistent answers.

3→1

product lines, one consistent
desk, the advice line applied the
same way everywhere

One desk for three product lines.

Enquiries about different products were handled differently by whoever picked up, and the advice line was held more carefully on some calls than others. The agent gave the broker a single, consistent front line: it routes to the right product and desk, answers from the same published rules, and applies the same general advice warning and the same escalation everywhere.

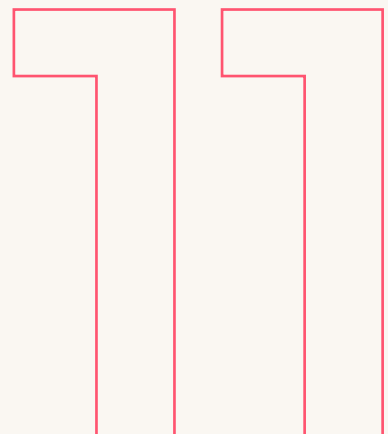
Support staff were freed from the repetitive enquiries, and the firm could finally see, in one place, how many enquiries came in and what happened to each one.

A NOTE ON THESE EXAMPLES

These are composites built to illustrate common patterns, not named clients. Your firm's results depend on your enquiry volume, your products and how you choose to use the agent. We are happy to talk through a realistic picture for your specific business.

Questions trading firms ask

The questions that come up in almost every first conversation, with straight answers.



FREQUENTLY ASKED

The honest answers.

Will people know they are talking to an AI?

Yes, always. The agent tells callers plainly that they are speaking with your firm's automated assistant. Transparency is a requirement, not an option, and they can ask for a person at any time.

Can it give trading or financial advice?

No. By design it stays in general information: how your product works, what it costs, what the rules are. It does not recommend, predict or promise, and it escalates anything advice-shaped to a licensed person. The whole guide is built on that boundary.

Does it work with our customer and onboarding systems?

It connects to common customer, onboarding and ticketing tools through permissioned access, logging conversations and moving applicants to the next step. We confirm compatibility with your specific systems before you commit to anything.

Where does our customer data go?

It is handled under your privacy policy and the Australian Privacy Principles, collected only for the task, encrypted, and held within boundaries you control, which for Australian firms typically means Australian data centres. Every interaction is logged.

Will it replace our team?

No. It takes the repetitive, interruptive layer of the work so your team can focus on the conversations that need a person. Firms generally redeploy their people onto higher-value work rather than reduce them.

How does it sit with the rules ASIC is enforcing?

The agent is built to keep to the advice line and your licence conditions. It never guarantees or implies a return, the conduct ASIC has targeted in its finfluencer and CFD work, and every conversation is logged so you can show exactly what was said.

How long until it is live?

Days, not quarters. The groundwork in Section Seven is the main task, and most of it is writing down how your firm already runs. After that, configuration and testing are quick.

Can it work the overnight markets?

Yes, and this is often where firms feel the change first. The overnight sessions, when most of the global market is awake and your desk is closed, are exactly where an always-on agent earns its place.

What if we want to change how it behaves?

You change the rules in plain language and the change applies to every conversation from then on. Consistency becomes a setting. You can also listen back and read transcripts whenever you like.

Your first seven days

A short, concrete path from reading this guide to a live agent working your enquiry desk. Three steps, one week.



FROM HERE TO LIVE

Start with one job. Grow from there.

DAYS 1-2**Map the basics**

Work through the Section Seven checklist. Pin down your top enquiry reasons, your published rules, your escalation points and, above all, where the advice line sits. This is the real work.

DAYS 3-5**Configure and test**

We set the agent up to match your rules, connect it to your systems in a controlled way, and test it together against real enquiry scenarios until it sounds like your firm and holds the line every time.

DAYS 6-7**Go live on one job**

Start with a single job, often the overnight enquiries or first-response to new leads, watch the reports, then widen its remit once you trust it. Small start, fast confidence.

THE ONE DECISION TO MAKE THIS WEEK

You do not need to commit to a full rollout. Pick the single job that hurts most right now, the overnight window, the leads that go cold, or the onboardings that stall, and let an agent take just that. The rest follows from what you learn.

When you are ready, the best next step is a short walkthrough where we build a realistic picture for your firm: your numbers, your rules, and a clear view of what the agent would and would not do. No generic figures, no pressure.

Answer every enquiry. Never cross the advice line.

A digital worker that handles your sales and support desk around the clock, qualifies every lead and stays firmly clear of financial advice. Built for Australian trading firms.

TALK TO US

Agentic.ai
Book a 20-minute walkthrough for your firm

ABOUT THIS GUIDE

General information only.
Not legal, financial or compliance advice.
Confirm your obligations with the appropriate adviser.