

Wealthsimple improves knowledge access and enhances efficiency with Glean

98%

Of Wealthsimple employees have utilized Glean to find crucial knowledge

90%

Of users reported that Glean saved them greater than 15 minutes every week

\$1.03M

In yearly cost savings as a result of the time saved with Glean

About Wealthsimple

Wealthsimple is a financial company on a mission to help everyone achieve financial freedom. Using smart technology, Wealthsimple takes financial services that are often confusing, opaque and expensive and makes them simple, transparent, and low-cost. The company was founded by a team of financial experts and technology entrepreneurs, and is headquartered in Toronto, Canada. To learn more, visit www.wealthsimple.com.

The challenge

After facing exponential growth, Wealthsimple employees expressed that finding information was a pressing challenge. **"Within R&D surveys, pulse surveys, and 'ask us anything' sessions—anytime there was an opportunity for feedback, employees were voicing that finding the knowledge needed to do their jobs was a struggle,"** said Kathleen Cauley, Knowledge Manager at Wealthsimple. **"The lack of accessibility was causing a lot of frustrations."**

As a remote-first organization, workers had access to the tools needed to do their jobs, but unlocking crucial information was an arduous and manual process. Tenured employees who had the most historical knowledge at the company found themselves spending significant time acting as sources of wayfinding. The most senior leaders within the organization spent considerable time helping others find information, which blocked them from focusing on more pressing initiatives.

To increase innovation, get products to market faster, and improve the employee experience, Wealthsimple needed to make knowledge easily accessible for all.

The solution

Glean created a one-stop shop for information discovery by connecting Wealthsimple's core applications, such as Google Docs, Github, Jira, Slack, and more. By centralizing organizational knowledge within Glean, employees unlocked the ability to search and quickly uncover answers independently. By empowering individual contributors to find answers on their own, tenured leaders were able to shift valuable time away from wayfinding and back toward business growth.

“ People find information faster with Glean. By looking from a 10,000 foot level, you see the deeper compounding effect this has—Engineers solve incidents faster, leading to improved customer experiences, less down time, and an overall better experience for everyone involved.



Kathleen Cauley
Knowledge Manager, Wealthsimple

Employees' frustrations around information access also drastically improved. In pre-Glean surveys, information retrieval consistently surfaced as a top pain point. Post-Glean, mentions of the topic had stopped. "If you did the back of napkin math around how much time people saved with Glean, using the lowest metrics and salaries, it paid for itself," said Cauley.

By expanding their access to critical knowledge, Wealthsimple employees were empowered to lean into their curiosity, make better-informed decisions, and work more efficiently towards their goals.

Improving product and support response times

Within highly technical R&D roles and customer-facing support roles, Glean was a game-changer for productivity. Their ability to save time when uncovering answers resulted in faster response times and more efficient support.

With the integration of Glean into their daily workflows, members of Wealthsimple's Client Experience team could quickly uncover answers and respond to their incoming customer's questions faster. As a result, average handle times decreased, which lowered the cost of calls and chats overall. **"I love Glean so much—it's been my lifesaver! Whether I'm on a call with a client or trying to solve a complicated ticket, it's my go-to,"** Shared Helena Daoud, Registered Investment Agent at Wealthsimple. **"Glean's helped me be more efficient and has been instrumental in improving my daily productivity,"** added Malika Welsh, Client Experience Representative at Wealthsimple.

"Glean has made an incredible impact in improving our employees' workflow. Project briefs, technical how-to's, and organizational structure can all be found through Glean. Glean helps us find accurate and relevant information quickly and easily; reducing effort, toil and wasted time."



Anne Steptoe

VP of Infrastructure, Wealthsimple

With 73% of their engineers actively using Glean, the R&D team experienced similar improvements. Whether answers were buried within past Slack conversations, Google Docs, or Jira tickets, Glean made them quickly accessible. By eliminating their need to search individual systems for answers, support engineers were able to solve incidents faster. This allowed them to focus more energy back on building, which led to less downtime and an overall better product experience for everyone involved.

"Our main goals were to increase innovation, get products to market faster, and improve the employee and customer experiences," said Cauley. **"At a base level it may not be evident, but when you extrapolate what Glean delivers by decreasing disruption to people's workflows and empowering them to find the information they need when they need it— Glean enables all of the above."**

73% of Engineers

Use Glean most frequently to find information

Enhancing the onboarding experience

Glean's understanding of natural language and intuitive search interface made the barrier to entry very low, which required little to no training to ensure employees utilized it effectively. The dynamic AI-powered search attracted Wealthsimple to Glean initially, but additional features, such as Org Chart, unlocked additional value—specifically for new hires.

Before Glean, LinkedIn was one of the key channels for new employees to learn about their peers. However, it only provided insight into a fraction of their experience, and the quality of information gathered varied greatly depending on an individual's activity level. By leveraging Glean's Search and Org Chart functionalities instead, they were able to gather deeper and more relevant insights. Glean gave them visibility into the projects their peers had worked on, their teammates, who they reported to, etc., and allowed them to form stronger working relationships.

After being equipped with Glean, new hires could jump into workflows faster. **"New people come in and are immediately wowed when they can find what they need when they need it,"** said Cauley. Glean empowered both new hires and tenured employees alike by providing a clear starting point and streamlined approach to knowledge discovery.

About Glean

Glean searches across all your company's apps to help you find exactly what you need and discover the things you should know. Powered by next-generation AI, Glean delivers highly personalized results based on who you are, what you're working on, and who you're working with. With Glean, new hires onboard faster and employees quickly find the answers they need—or the people who can help. Glean is easy to use and ready to go: setup is quick and doesn't require professional services or manual fine-tuning.

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