

Voice Automation in Banking & Finance: Driving Engagement & Conversions

Challenges Faced by Fintech Sales & Support Teams



Manual Follow-ups Can't Scale

Leads go cold due to late or missed follow-ups, especially during off-hours and weekends.



Compliance & Quality Monitoring

Manual calls often deviate from scripts. Tracking consent and pitch accuracy is difficult.



Time-consuming manual data entry

Agents spend valuable time filling CRMs instead of closing deals

How Can Our Voice Agents Solve This?

Our AI voice agents handle every lead end-to-end — from the first call to the CRM update — with smart, scalable automation.

Instant response to every inquiry, 24x7

Auto-qualify leads via conversational flows

Multi-lingual support

Auto-detects lead status based on conversation

CRM integration for seamless data entry

Escalation to human agents when needed

From Call to Insight - No Manual Effort Needed

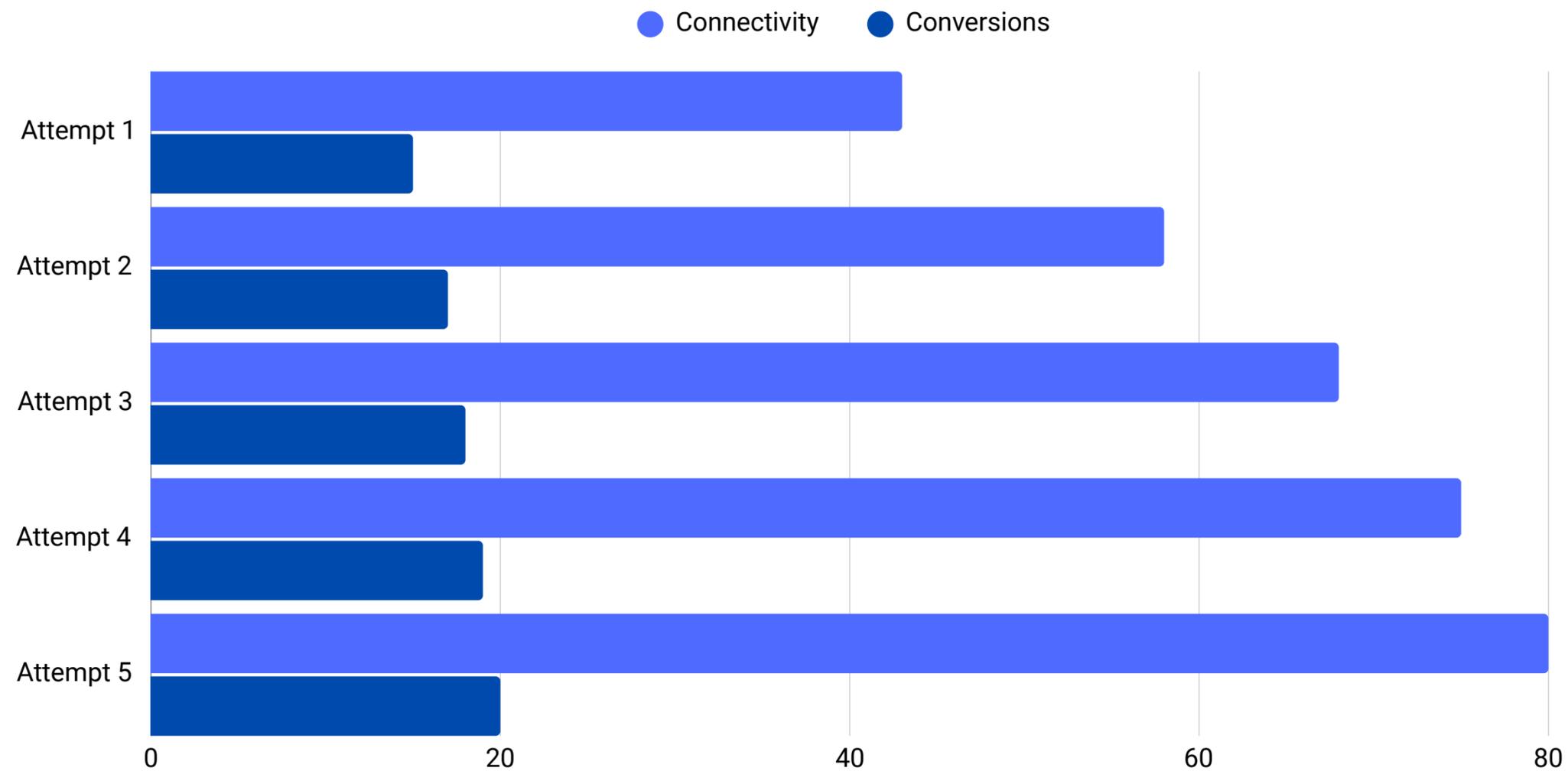
- Connects with 72%–85% of leads instantly
- Qualifies interest through natural conversation
- Qualifying metrics like loan amount, income, city, etc
- Filters out low-intent leads automatically
- Auto-updates CRM with call outcomes and lead status

Total Leads = 1050

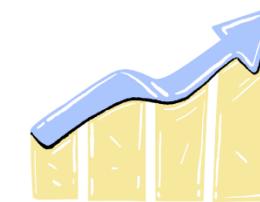
Connected = 839 (79.9%)

Interest = 166 (15.8%)

Attempt-wise - Cumulative Connectivity Vs Conversions



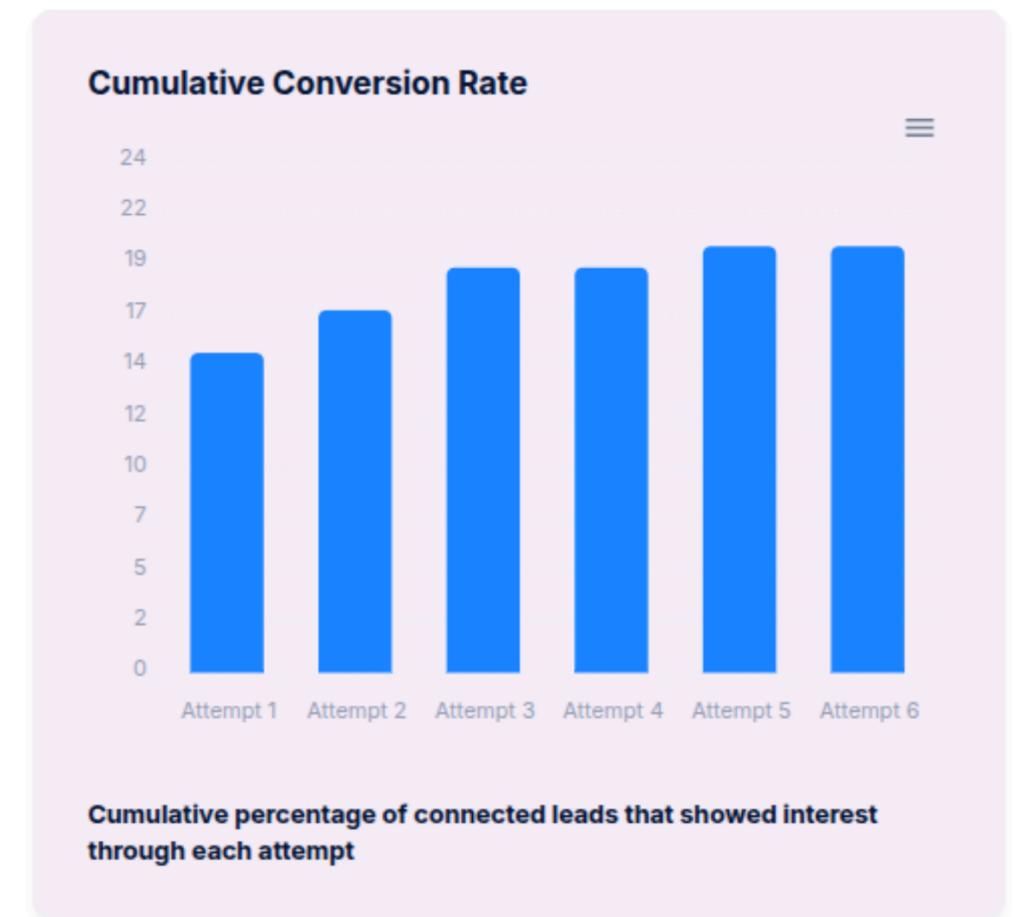
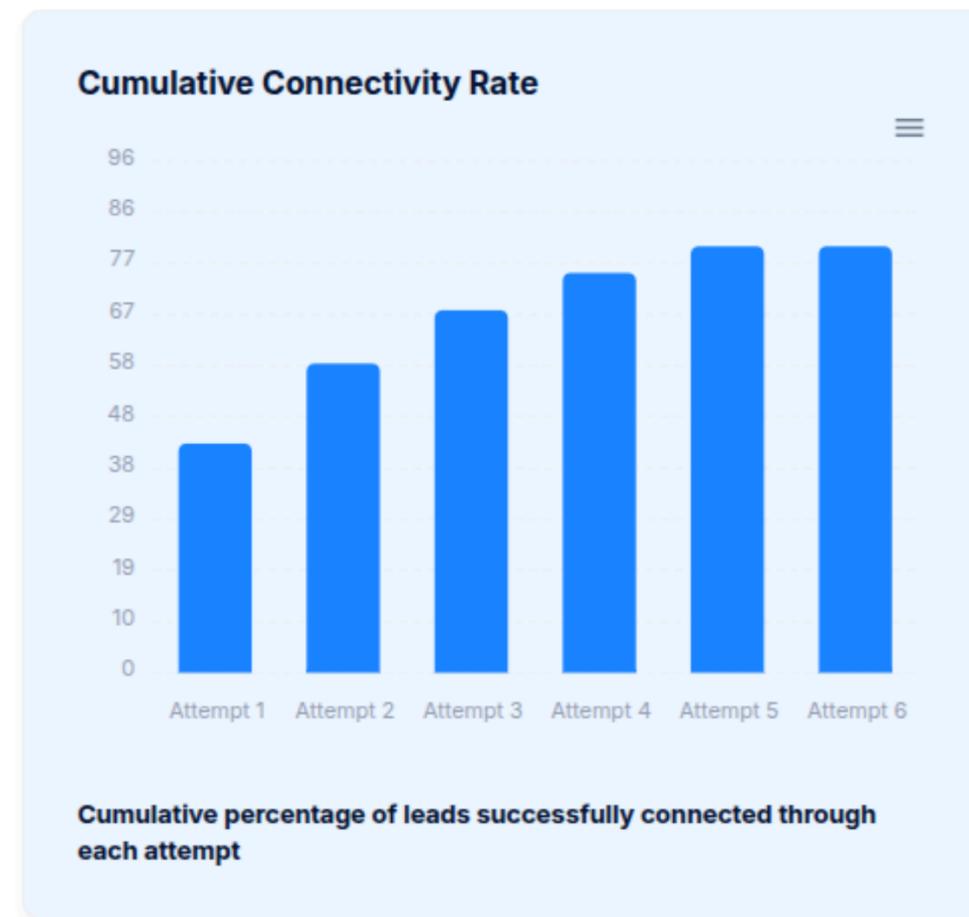
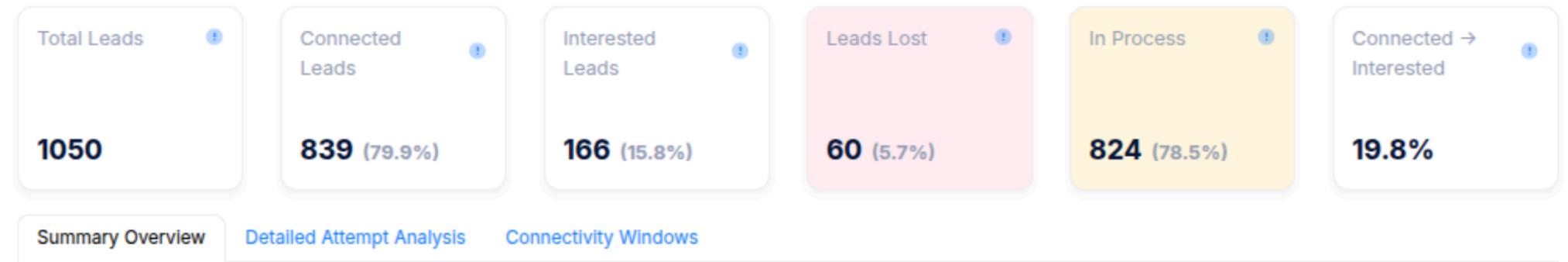
80% Connectivity



**20% Conversion to
Connected Calls**

Our Dashboard provides

- Comprehensive summary of connected, interested, and lost leads
- Connected to Interested %
- Attemptwise connectivity and conversion



Capture Structured Data from the Transcript

- Capture details like Car Model, On Road Price, Purchase Timeline
- Capture customer information like city, age, salaried or self employed, residence status, etc
- Capture intent, required loan amount and callback time

currentDate	2025-08-05
currentDayTime	Tuesday, August 5, 2025 at 01:53 PM UTC
loan_amount_required	800000
car_model	Tata Punch
onroad_price	1050000
employment_type	salaried employee
no_interest_reason	
buying_timeline	next month
city_age	{ "city": "Delhi", "age": 38 }
residence_status	own
itr_amount	
income	100000
Callback_time	2025-08-06T18:00:00+05:30
Accepted_referral	
nextCallbackRequestTime	2025-08-06T18:00:00+05:30
Time	8/5/2025, 7:16:39 PM

Know Your Connectivity Success Rate by Day & Hour

	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22
Su									36%	39%	39%	44%	48%	29%	45%	43%	41%	45%	45%	100%			
Mo									42%	39%	42%	58%	43%	57%	37%	48%	31%	14%	32%				
Tu									34%	26%	35%	43%	38%	38%	37%	29%	33%	23%	30%				
We									34%	34%	35%	46%	41%	32%	35%	32%	32%	36%	40%				
Th									37%	37%	35%	40%	49%	42%	39%	49%	29%	45%	49%	49%			
Fr									40%	0%	43%	47%	43%	35%	40%	47%	41%	37%	31%	54%			
Sa									38%	35%	41%	40%	42%	34%	41%	43%	43%	47%	47%	50%			

Curious? Get In Touch

Email

shraddha@heroteck.com

Website

<https://uservox.ai>

Call us

+91-8826226333

