



AI Trusted Advisors – Voice AI Case Study

■ Banking / Financial

Client Challenge: Credit unions and small banks had overloaded call centers with balance inquiries and appointments.

Voice AI Solution: Voice AI automated balance checks, answered FAQs, and scheduled advisor meetings.

Results in 30–60 Days: 25% reduction in call center costs, ROI in 45 days.

How They Benefited:

- Reduced live agent load
- Faster member service
- Higher satisfaction
- Freed advisors for complex cases

Key Benefits:

- Lower call center costs
- Better member experience
- 24/7 account access
- Improved advisor productivity

“Our members get instant answers without waiting on hold.”