

Doubling Appointments While Cutting Manual Calling Effort by 40–50%

How a financial services advisory team used AgentCallback AI to automate lead qualification and reclaim time for face-to-face selling.

INDUSTRY Financial Services	COMPANY SIZE 20 people	USE CASE Lead Qualification & Appointment Booking
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For a 20-person financial services advisory team, the biggest drain on the day wasn't paperwork or admin — it was the phone. Two to three agents spent hours every day calling the same leads, delivering the same script, fielding the same questions, and trying to lock in appointments. All before they could even think about sitting down with a client. They knew there had to be a better way to spend that time. AgentCallback AI gave them one.

The problem with doing it manually

Financial services is a relationship business. The real value an advisor brings is in the meeting — understanding a client's situation, building trust, and presenting the right solution. But before any of that can happen, someone has to make the call, get through to the lead, answer their initial questions, and convince them to show up. That part is repetitive and time-consuming.

The team was running two to three people on outbound calls every single day, working through the same script, call after call. It wasn't difficult work — it was just relentless. And it was eating into the time they could have been spending face-to-face with clients.

Getting started with AgentCallback AI

Like most people encountering AI voice technology for the first time, the team had doubts. Would it sound like a robot? The AgentCallback team worked closely with them to build and refine the script over multiple iterations — every objection mapped out, every edge case considered. By the time the AI went live, it was polished.

The voice itself was a surprise. The team had braced for something clinical. What they got was natural, conversational, and locally attuned — and that made a real difference in how leads responded.

"Sanchit made the voice very natural, very local. I was really quite surprised — and they were very prompt to implement objection handling and fix all the bugs. Very fast and very efficient."

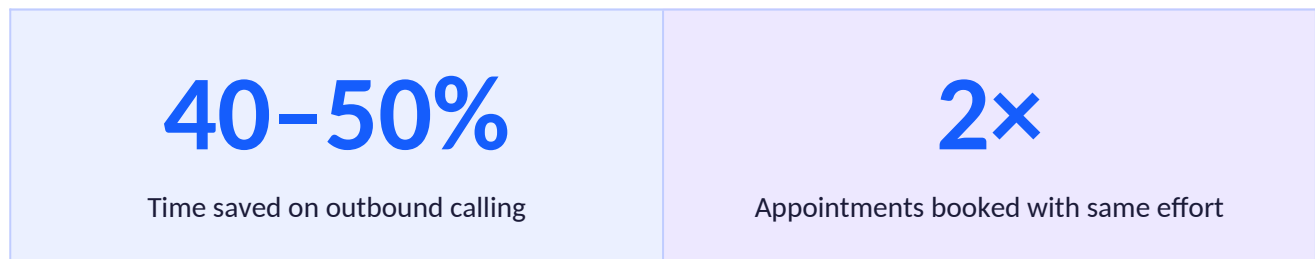
— Financial Services Advisor

How it works

Leads go into AgentCallback AI, which handles the outbound calls — working through the script, fielding common questions, managing objections, and booking the appointment on the spot. If a lead needs a human follow-up, that gets flagged. Everyone else lands in the calendar, confirmed and ready to meet. The team's role shifted: instead of spending their mornings dialling, they're walking into meetings.

The results

The difference showed up quickly. Agents were spending 40 to 50% less time on outbound calling, and the number of appointments being booked had roughly doubled — with the same team, putting in the same hours.



The team is honest about where things still need work — some leads require a human follow-up to convert, and they're continuing to refine the process. But they're not waiting for perfection to get value from it. AgentCallback AI has become a core part of how they operate, with more team members now onboarded.

"The effort is the same or lesser, but the number of appointments can now double. We see it as a supplement — and in the future, as the AI becomes more perfect, it may be an even better transition."

— Financial Services Advisor

What's next

The team is focused on getting more out of every lead, tightening the script, and rolling the platform out across more of the team. In an industry built on trust and relationships, getting agents out from behind the phone and in front of clients more often is exactly the kind of shift that moves the business forward.

Ready to automate your outbound calls? Visit agentcallback.com