



WealthIO Digital AI

AI Sales Agent Case Study

Table of Contents



01 Project Overview

02 The Challenge

03 The Solution

04 The Results

05 The Impact

06 The Testimonial

The Challenge

Facing a staff shortage, **the daycare coordinator found it increasingly difficult to manage the surge of inquiries and leads generated from our Facebook ads.** Responding swiftly became a challenge, and occasionally, some leads were left without contact.

This situation led to wasted ad spend and compromised the quality of customer experience we aim to provide.

THE SOLUTION

ZARA

Our AI Appointment Setting Sales Agent

Her Objective

We developed an Artificially Intelligent Agent to automatically reach out to new leads to greet, qualify and set facility tours on behalf of the coordinator.

Zara **engages with leads within 2 minutes of Lead Form submission and follows strict qualification guidelines set by the client.**

How She Was Built

Our AI appointment-setting bot was built using custom automation workflows and fine-tuned NLP models. Trained on real sales conversations, it autonomously qualifies leads and books appointments seamlessly.

THE RESULTS

Zara streamlines lead management, securing more bookings with instant engagement and automated scheduling.

81%

Reduction in Time-to-First
Contact

25%

Increase in Tour Schedules

15%

Increase in Registrations

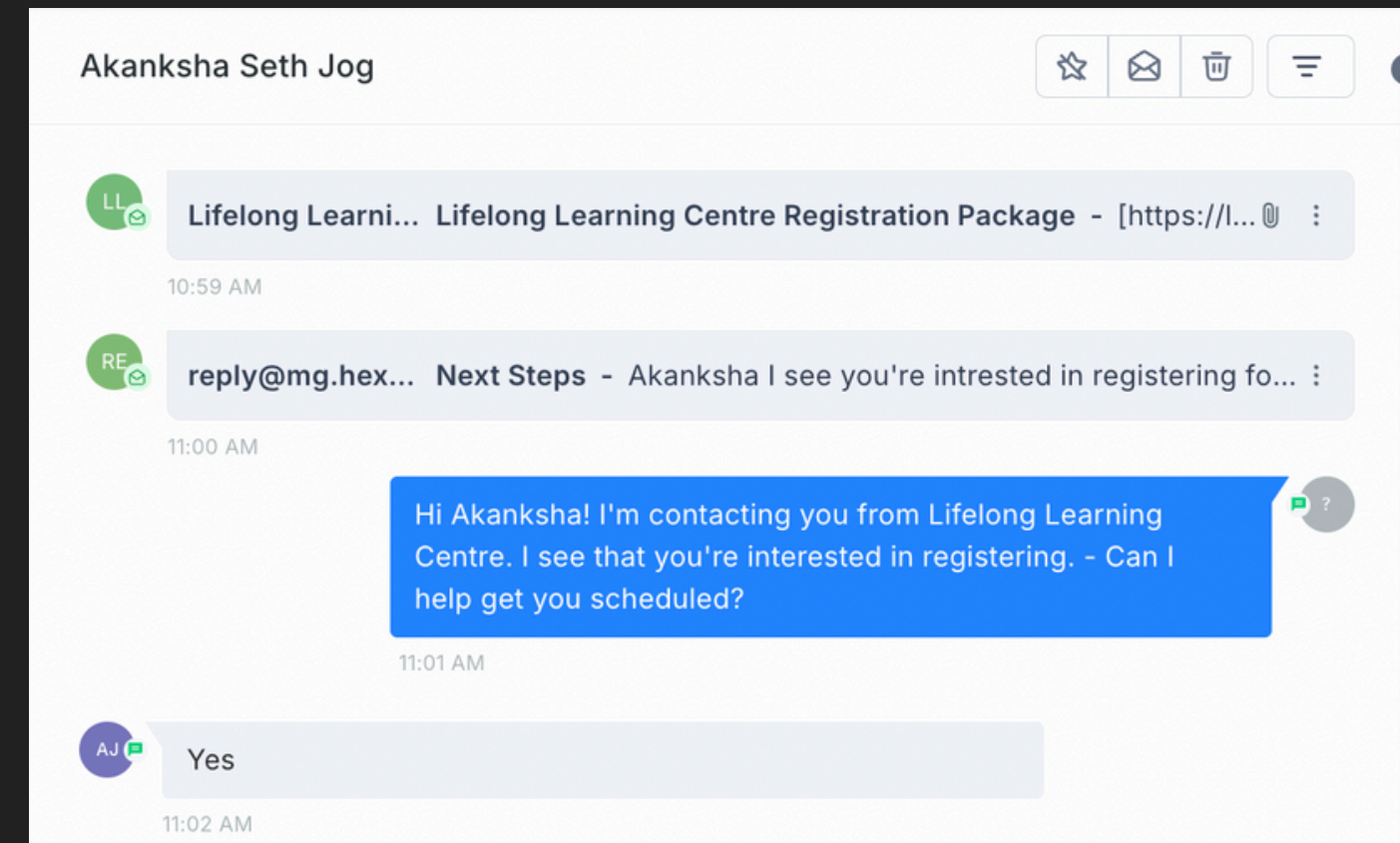
2X

Increase in ROAS (Return
on Ad Spend)

Case Study

Project Spotlight

Zara was deployed to seamlessly integrate with the daycare's Facebook ad campaigns, instantly engaging leads as soon as they submitted an inquiry. Outreach was done via SMS, ensuring quick, direct communication that guided parents through the qualification process and scheduled facility tours effortlessly.



35%

Decrease in No-Show Rate f