Enhancing Collections and Support for Financial Solutions



The client, a digital personal finance company that connects U.S. consumers with debt relief solutions, including settlement programs, loans, and credit repair. To manage growing outreach requirements and qualify leads at scale, the company partnered with Fusion CX to establish a high-performance, outbound-driven customer engagement model

The Challenge

The client faced four key operational challenges:

1. **Manage high-volume outbound lead generation:** Handle growing daily call volumes while maintaining consistent outreach and lead qualification.
2. **Maintain qualification quality:** Ensure consistent execution of pre-qualification scripts and quality customer interactions.
3. **Coordinate advisor handoffs:** Enable real-time routing and warm transfers to U.S.-based credit advisors in Texas.
4. **Scale without compromising performance:** Expand operations while meeting conversion, service-level, and compliance expectations.

The Solution



Fusion CX deployed telemarketing and lead generation teams across its delivery centers to support outbound outreach, inbound overflow, lead pre-qualification, and advisor transfers.

The engagement began with a flexible staffing model that enabled rapid expansion in line with changing call volumes. Centralized training and quality assurance helped maintain consistent agent performance, while compliance processes supported adherence to applicable U.S. debt settlement requirements.

Fusion CX also established a continuous feedback loop with the client's advisors to refine qualification scripts, improve lead quality, and streamline warm handoffs. Routing processes were optimized to ensure qualified prospects could be transferred efficiently to Texas-based advisors.

Following the initial ramp-up, the model supported expansion across multiple sites, with Legazpi identified for planned Q4 2024 capacity growth to accommodate the anticipated holiday volume surge.

Results

The engagement established a scalable lead generation and customer engagement operation, supporting higher outreach volumes and more efficient advisor coordination.

Key outcomes included:

- 10+ FTEs within two months, with zero SLA breaches.
- 29+ FTEs supported across the expanded operation.
- 10 to 20 FTEs scaled from June into Q3 across sites, as reported in the brief.
- 30% improvement in agent-to-advisor transfer time through routing optimization.
- Improved customer qualification and transfer rates through refined scripting.
- Maintained conversion performance and compliance expectations during expansion.
- Positioned for multi-region expansion in Q4 2024 following the pilot's success.

The engagement demonstrated Fusion CX's ability to build a flexible, outbound-led operating model that supports lead generation, qualification accuracy, and efficient advisor handoffs while adapting to changing business volumes.