

BANKING AND LENDING

Loan-protection cross-sell voice agent for a lender

Active-loan customers are the best audience for loan-protection cover, but outbound calling is expensive. Wexa built a voice agent that explains the plan, captures interest and sends the documents.

4

call outcomes logged automatically

2

document channels: WhatsApp and email

Auto

retry on unanswered calls

CLIENT

Consumer lender

REGION

India

WHEN

2025–2026

ENGAGEMENT

Proof of concept

WEXA COMPONENTS

Outbound voice agent • WhatsApp and email • CRM update

01 — CASE 32

The challenge

— Manual outbound calling to eligible borrowers

- Product explanation varies by agent
- Follow-up documents sent late or not at all

What Wexa built

- ✓ Eligible active-loan customers identified and called by the agent
- ✓ Explains cover for job loss, medical emergency and accident, with monthly and yearly premiums
- ✓ Sends brochures and policy documents by WhatsApp and email
- ✓ Logs Interested / Follow-up / Not interested / Not connected, with automatic retries

02 — CASE 32

How it runs on Wexa

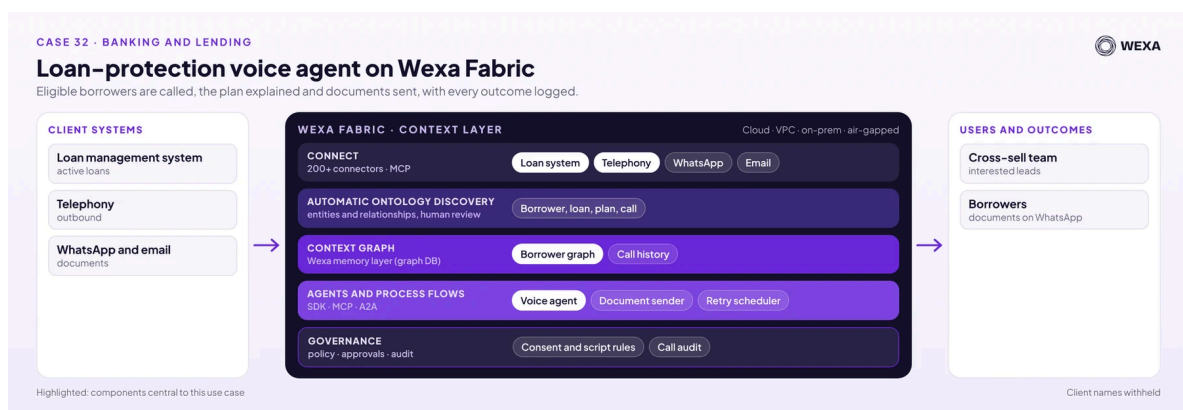


FIGURE How this use case runs on Wexa: client systems connected, ontology discovered, context graph in the Wexa memory layer, agents and process flows, and governance. Highlighted components are central to this use case.

Results

MEASURE	BEFORE / WITHOUT WEXA	WITH WEXA
Outbound calling agents	20 agents	4 agents
Annual cost of the process	\$100K	\$20K
Time to implement the AI solution	3 months	2 weeks
AI build cost (one-time)	\$96K	\$7K
AI operating cost per year (models, infrastructure, upkeep, platform)	\$65K	\$29K
Total AI cost in year 1	\$161K	\$36K

WITH WEXA

\$51K

net annual value to the client after Wexa's own operating cost

6x

faster to implement

55%

lower AI operating cost

\$125K

less AI spend in year 1