

CASE STUDY

Stop Hiring. Start Deploying.

How a 5-part digital workforce helped an online accounting school generate new enrollments and sales conversations in one month.



VoiceROI

GUARANTEED

Real Always On Intelligence

The Client: An online accounting school helping aspiring accountants build, grow, and modernize their practices.

The school already had a strong marketing engine. Leads were coming in from multiple offers, including free resources, a free 90-day challenge, paid programs, and live events. They also had a sales team that could close.

But there was a problem. The sales team could not personally call, qualify, follow up with, and route every lead fast enough.

The issue was not demand. It was the middle of the funnel.

Leads were showing interest, downloading resources, filling out forms, and entering campaigns, **but too many were not being reached quickly enough.** Some needed instant follow-up. Some needed a second touch a few days later. Some were older leads that still had value but had gone quiet.

To scale the funnel manually, the school would have needed to add more sales development capacity. Instead, they deployed a digital workforce.





The school did not need more leads. **It needed every lead worked properly.**

Like many growing education businesses, the school had multiple lead sources running at the same time.

People were entering through:

- A free 90-day Accountpreneur's Challenge
- Free resource downloads
- Paid program interest
- Older lead lists
- Live event campaigns

Each funnel created opportunity. But each funnel also created work.

Every lead needed to be contacted. Every interested person needed to be qualified. Every hot prospect needed to be routed to sales. Every “not right now” needed follow-up. Every older lead needed another chance before being written off.

The sales team was being pulled into the wrong work. Instead of spending their time with people ready for a real sales conversation, they were stuck chasing, dialing, following up, and trying to keep up with volume.

The bottleneck was clear: The school had a sales team. What they needed was a workforce behind the sales team.

THE
challenge



VoiceROI deployed a 15-agent digital workforce across the funnel

VoiceROI built and deployed a team of specialized AI voice agents.

Each agent had one clear job.

- Some enrolled new leads into the free challenge.
- Some responded instantly to resource downloads.
- Some followed up three days later.
- Some reactivated older leads.
- Some supported live event attendance confirmation.

Together, they worked like a digital workforce, always on, always following the process, and always feeding the human team with better opportunities.

The sales team did not grow. The workforce supporting them did.

THE
Solution



THE DIGITAL WORKFORCE

VoiceROI deployed agents across five core functions:

| Workforce Function | Role |
|---|--|
|  Lead Enroller |  Enrolled interested prospects into the free 90-day challenge |
|  Speed-to-Lead agents |  Called new resource download leads within 30 seconds |
|  Follow-up agents |  Re-engaged resource leads three days later |
|  Sales reactivation agents |  Called older leads at the 20-day mark |
|  Events operation agents |  Confirmed attendance for live event registrants |

The result was a full-funnel support system that could handle the work humans rarely have time to do consistently.

THE
Solution

THE BREAKTHROUGH: THE FORM WAS KILLING CONVERSION.

From Leaky Funnel to Enrollment Engine: How Voice ROI turned their 90-day challenge into a scalable growth driver



The **free 90-day Accountpreneur's Challenge** was one of the school's most important top-of-funnel offers.

The goal:

Turn every enrollment into a warmer future prospect for paid programs

The problem:

Extra step (form) caused drop-off and limited results.

The solution:

VoiceROI agent enrolls leads directly during the call.

Before VoiceROI, the campaign was producing only around 2-3 enrollments per month.

At first, the AI agent called leads, qualified interest, and then sent interested people an SMS with a signup form. The calls were working. The form was not.

VoiceROI's data showed that the biggest drop-off happened after leads received an SMS signup form.

The workflow was redesigned so the AI agent enrolled people directly during the call. Removing the extra step transformed a slow, leaky funnel into a scalable enrollment engine.

138



CHALLENGE
ENROLLMENTS

BEFORE VOICEROI

VS.

AFTER VOICEROI



Before VoiceROI, the campaign was producing only around **2-3 enrollments per month.**



The new workflow turned a slow, leaky funnel into a **scalable enrollment engine.**

THE OLD WORKFLOW (LEAKY FUNNEL)



THE NEW WORKFLOW (ENROLLMENT ENGINE)



VoiceROI's data showed that too many interested people were **dropping off** before completing the extra step.

THE RESULTS



TURNING RESOURCE DOWNLOAD INTO REAL SALES CONVERSATIONS

Voice ROI's Speed-to-Lead and Follow-up Agents capture intent and create pipeline.

The school also had multiple free resource funnels. Each download represented buyer intent. Someone had a problem. Someone wanted help. Someone was thinking about their accounting business.



Someone had a **problem**



Someone wanted **help**



Someone was thinking about their accounting business

But buyer intent faded quickly. So VoiceROI deployed speed-to-lead agents across the school's resource funnels.

Speed-to-lead agents call within 30 seconds

When someone downloads a resource, the correct AI agent calls within 30 seconds while the prospect is still engaged and thinking about their problem.



In April, these instant follow-up calls generated 13 live transfers to the sales team.



3-day follow-up agents keep the conversation going

Agents call again 3 days later to continue the conversation, qualify interest, and either transfer hot prospects or book meetings.



More conversations. More qualified leads. More opportunities.

By April, the resource download workforce was producing meaningful sales conversations from leads that otherwise may have only received an email follow-up.



Instead of relying only on manual follow-up or email nurture, every resource download had a path toward a **real sales conversation**.



Resource Downloaded



Instant Call (Within 30 Seconds)



Follow-Up Call (3 Days Later)



**FRESH INTENT.
LIVE PIPELINE.**

RESOURCE DOWNLOAD RESULT APRIL OUTCOME



Resource download form fills worked

267



Speed-to-lead response time

**Within
30 seconds**



Live transfers from instant follow-up

13



Additional transfers from 3-day follow-up

10



Booked meetings from 3-day follow-up

4



TOTAL SALES CONVERSATIONS FROM RESOURCE DOWNLOADS

27

THE SALES REACTIVATION AGENT

Turning older leads into new pipeline.

The school also had older leads sitting in the pipeline. These were people who had already shown interest but had not yet converted. Most businesses let those leads fade out. Not because they are worthless. Because nobody has time to keep calling them.

VoiceROI deployed a dedicated sales reactivation agent to call leads at the 20-day mark.

In April, that agent produced:

| SALES REACTIVATION RESULT | APRIL OUTCOME |
|--|---------------|
|  Live transfers | 16 |
|  Direct booked meetings | 2 |
|  SMS-attributed meetings | 19 |
|  TOTAL SALES CONVERSATIONS | 37 |



These were conversations the human team did not have to chase.
They simply showed up as new opportunities.



THE GROWCON EVENT AGENT

Confirming attendance before a high-value live event.

The school also deployed a VoiceROI event operations agent for GrowCon, a live event campaign.

Live events are high-value sales opportunities, but they are also one of the easiest places for revenue to leak.

People register. People say they are coming. Then plans change.

If the sales team does not know who is actually attending, who needs a Zoom option, and who has gone quiet, the event pipeline becomes harder to manage.




The GrowCon agent was designed to:

- Call event registrants before the event
- Confirm whether they were attending
- Offer a Zoom option when appropriate
- Capture last-minute attendance changes
- Give the sales team a cleaner picture of who was actually showing up

GrowCon results to be added once final campaign numbers are confirmed. For now, GrowCon is excluded from the April performance totals below.





By April 2026, the digital workforce was supporting enrollment, resource follow-up, sales reactivation and event operations.

| APRIL OUTCOME | | RESULT |
|---|--|------------|
|  | New free challenge enrollments | 138 |
|  | Live transfers to the sales team | 39 |
|  | Booked appointments | 25 |
|  | TOTAL SALES CONVERSATIONS DELIVERED | 64 |



THE **64** SALES CONVERSATIONS CAME FROM:

| SOURCE | SALES CONVERSATIONS |
|---|---------------------|
|  Resource download follow-up | 27 |
|  20-day lead reactivation | 37 |
| TOTAL | 64 |

THE **result**

Optimization Over Time

The workforce got better as the data improved.

VoiceROI did not just launch agents and leave them running.

The system improved as the team reviewed call outcomes, identified friction points, adjusted workflows, and optimized follow-up.

Appointment volume increased month over month:



TOTAL APPOINTMENTS

| MONTH | TOTAL APPOINTMENTS |
|----------|--------------------|
| FEBRUARY | 4 |
| MARCH | 14 |
| APRIL | 25 |



SMS-ATTRIBUTED APPOINTMENTS ALSO IMPROVED:

| MONTH | SMS-ATTRIBUTED APPOINTMENTS |
|----------|-----------------------------|
| FEBRUARY | 4 |
| MARCH | 14 |
| APRIL | 19 |

That is the power of a digital workforce. Every conversation creates data. Every data point reveals a bottleneck. Every bottleneck becomes an opportunity to improve the funnel.



Why It Worked



The agents had specific jobs.

This was not one generic AI assistant trying to do everything. Each agent had a defined role, a clear script, and a specific outcome. That made the system easier to manage, easier to optimize, and easier to scale.



Speed-to-lead protected fresh intent.

When someone downloads a free resource, they are actively thinking about a problem. Waiting hours or days to follow up gives that intent time to fade. VoiceROI called within 30 seconds, while the lead was still warm. That speed helped turn resource downloads into live sales conversations.



The sales team stayed focused on sales.

The AI workforce handled the repetitive, time-sensitive work: Calling, following up, qualifying, routing, booking, reactivating. The human team stayed focused on the conversations that mattered most.



The system found the leak.

The biggest enrollment improvement came from discovering that the signup form was creating friction. Once the agent started enrolling people directly on the call, the challenge became a much stronger top-of-funnel engine. This is what makes VoiceROI different. It does not just automate activity.



The Bigger Impact

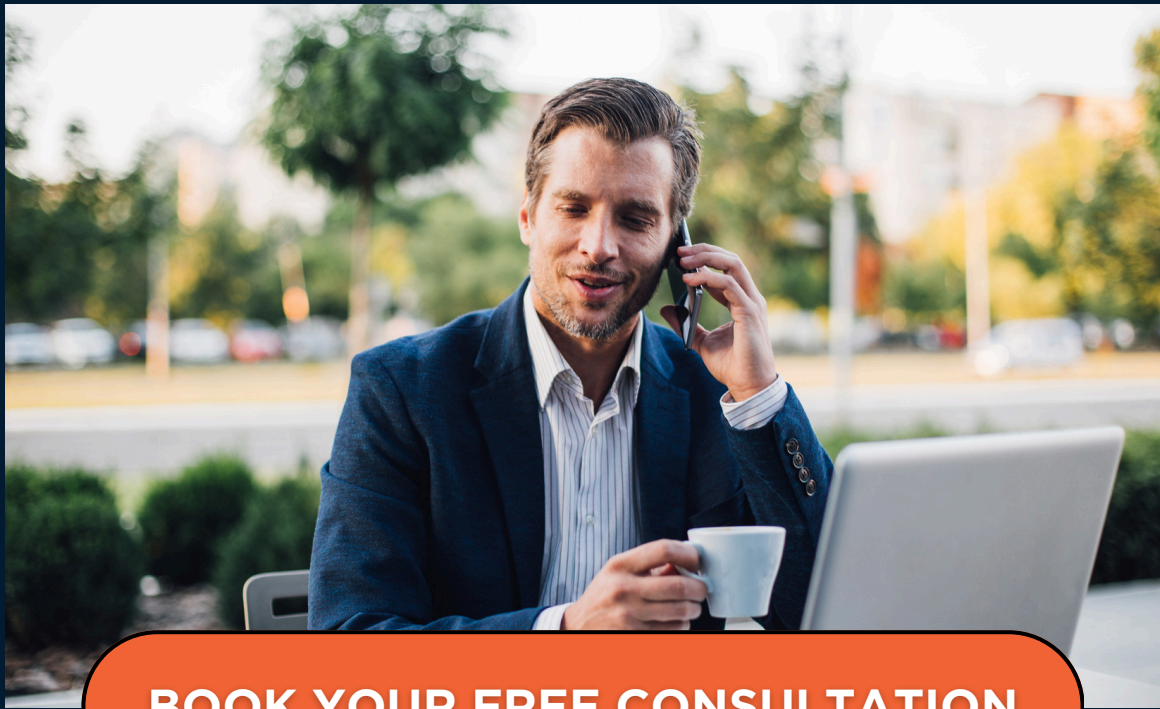
Before VoiceROI:

- ✔ Leads were coming in, but follow-up capacity was limited.
- ✔ The sales team had to chase too much manually.
- ✔ Interested prospects were dropping off before completing enrollment.
- ✔ Older leads were at risk of being forgotten.
- ✔ Resource downloads were not being worked consistently enough.
- ✔ Event attendance needed confirmation support.

After VoiceROI:

- ✔ The school had a digital workforce supporting the sales team across the funnel.
- ✔ Challenge leads could be enrolled directly on the call.
- ✔ Resource download leads were called within 30 seconds.
- ✔ Older leads were reactivated.
- ✔ Event registrants had a confirmation process.
- ✔ The human team received 64 sales conversations in one month.
- ✔ The free 90-day challenge generated 138 enrollments in April.

THE
takeaways



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GUARANTEED

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