

CASE STUDY

# The Hidden Goldmine: How a Wealth Management Firm Reactivated 900+ Existing Clients and Booked 37 Portfolio Review Meetings



## VoiceROI

GUARANTEED

Real Always On Intelligence

## About the Firm

A nationally recognized wealth management firm specializing in financial, estate, and legacy planning for high-net-worth families.

Their advisors manage long-term client relationships built on trust, depth, and personalized strategy.

**But like most growing firms, they had hit a structural ceiling:**

- 1,900 existing clients in their book
- A new product ready to introduce
- Not enough advisor hours to reach the people most likely to buy

**Their growth wasn't limited by leads. It was limited by bandwidth.**





# The most valuable list in the business, and no one was calling it.

Before VoiceROI, the firm faced a problem most wealth management firms quietly accept as normal:

- **Advisors were too busy to systematically call existing clients.** Their time went to active deals, urgent client needs, and compliance — not proactive outreach.
- **Clients hadn't been contacted in months.** Some hadn't heard from the firm in over a year.
- **A new product had launched,** but there was no system to put it in front of the clients most likely to want it.
- **Manual calling didn't scale.** Even if every advisor blocked time, 1,900 clients would take months to work through.

*The clients were already paying. Already loyal. Already qualified. They just weren't being called.*

*They didn't need new leads. They needed someone to actually call the goldmine sitting in their CRM.*

THE  
challenge





## What VoiceROI Did

VoiceROI deployed a fully managed outbound voice + SMS system designed specifically for high-trust, relationship-based industries.

### The AI agent:

- **Called existing clients** in a warm, professional tone, matched to the firm's brand voice
- **Opened with a satisfaction check-in:** how was their experience with the firm?
- **Introduced the new product naturally** inside the conversation
- **Offered to book a portfolio review** with their advisor to walk through it
- **Sent a follow-up SMS** with the booking link to every client reached

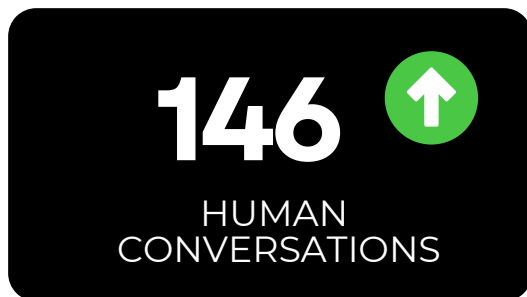
**The result:** every client got a personal touchpoint, a real conversation, and a clear next step, without pulling a single advisor off their existing work.

**No new hires. No advisor time. Just the goldmine, finally being called.**

THE  
Solution

# RESULTS (VOICE CAMPAIGN)

Over a 6-week period, the AI agent worked through roughly half the firm's existing client base.



## Conversion funnel:

- ✓ **14.8%** of dials reached a live human conversation
- ✓ **53.4%** of those conversations resulted in a positive outcome
- ✓ **47.4%** of positive calls converted into a booked portfolio review

More than 1 in every 2 real conversations turned into genuine interest.

THE  
**result**

## RESULTS (SMS + ONGOING IMPACT)

857

SMS SENT



169

LINK CLICKS



19.7

CLICK-THROUGH RATES

**A 19.7% click-through rate: nearly 10x the industry SMS benchmark.** And the campaign is still running.

With 1,000 clients still left to call, the firm is on track to double these results, without adding a single hour of advisor time.

**37 portfolio reviews booked.** Each one a chance to deepen the relationship and introduce a new product. From a list that wasn't being called at all.

THE  
**result**

## The Bigger Impact

**Most firms chase new leads while the most valuable list in their business sits untouched.**

- ✓ They didn't run ads.
- ✓ They didn't buy leads.
- ✓ They didn't hire more advisors.

**Let's turn your existing book into your next growth engine.**

**BOOK A CALL TODAY**

