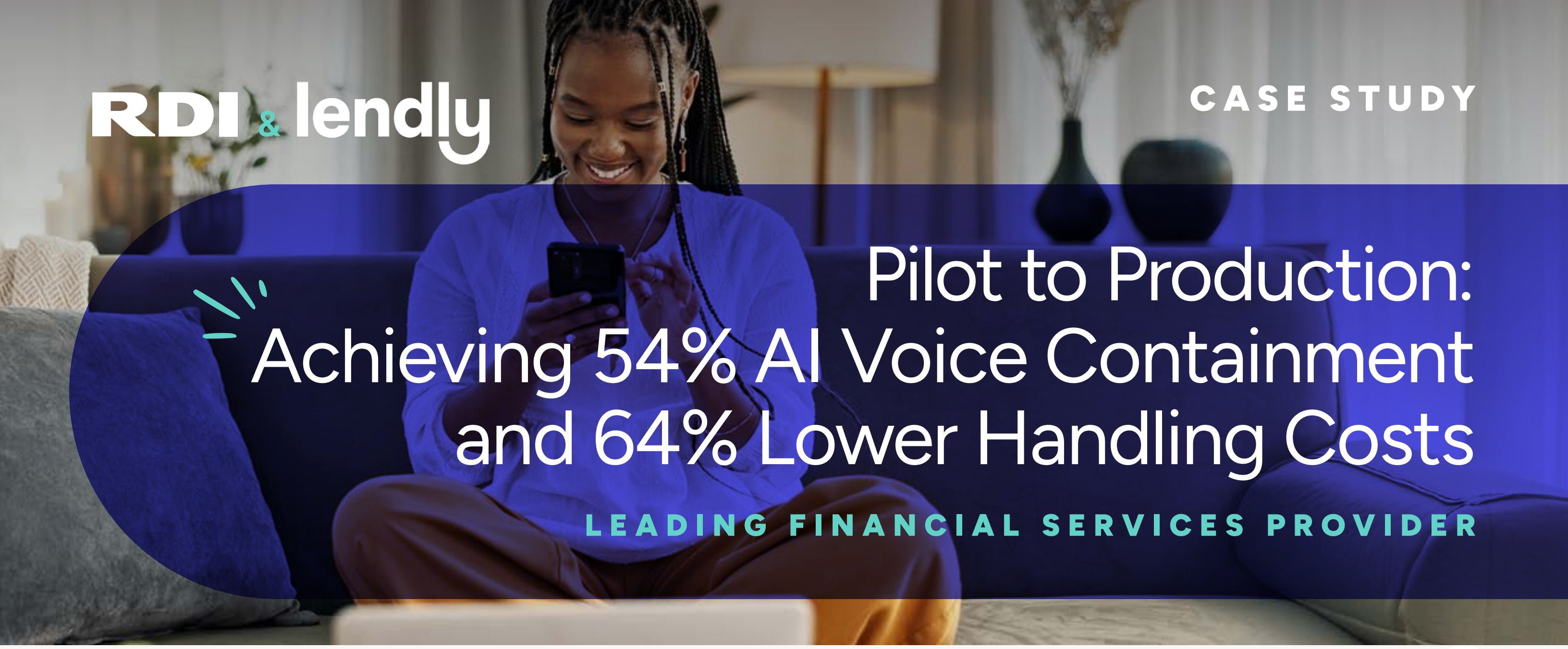


RDI & lendly

CASE STUDY

Pilot to Production: Achieving 54% AI Voice Containment and 64% Lower Handling Costs

LEADING FINANCIAL SERVICES PROVIDER

How RDI helped Lendly move from a targeted AI voice pilot to measurable production results in just 20 days.

The Business Challenge

Every pending loan application generated another status call—and every status call required a live agent.

For **Lendly**, an online lender specializing in installment loans and lines of credit, growing application volume was creating a high volume of repetitive status inquiries. Customers needed quick, accurate updates, but resolving those routine questions required valuable live-agent capacity.

Lendly needed a way to scale support without adding headcount or compromising the customer experience.

RDI's opportunity: automate a high-volume, low-complexity interaction while preserving a seamless path to human support when needed.

RDI'S Approach: Prove → Refine → Scale

Rather than attempting to automate every interaction at once, RDI recommended a crawl-walk-run approach. The strategy allowed the teams to validate the technology with a focused use case, learn from real customer interactions, and continuously improve the solution before expanding its reach.

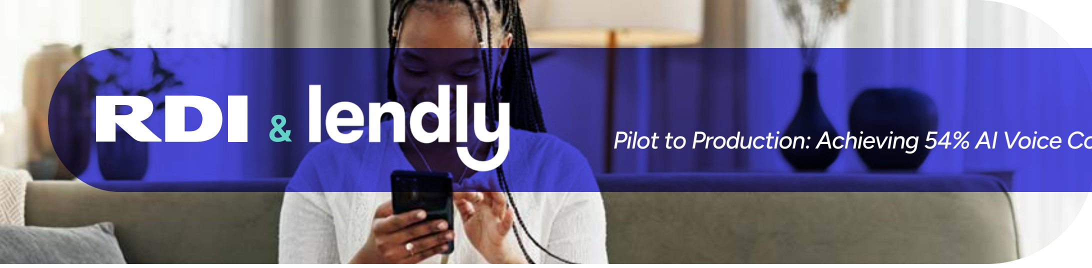
At a Glance

54%
AI voice containment in production

64%
Estimated reduction in handling costs

97%
Positive or neutral customer sentiment

7,546
Calls handled in first 20 days



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1 Crawl: Prove the Concept

RDI and Lendly began with a controlled 30-day pilot focused exclusively on pending application status calls.

Pilot results:

- **888** calls handled
- **37%** containment
- **92%** positive or neutral sentiment
- **24.5%** estimated handling-cost reduction
- **$914** estimated net savings

The 37% containment rate exceeded the 30% ROI break-even threshold, demonstrating that the use case could deliver both customer and financial value.

"The strong customer acceptance during the pilot demonstrated that we could successfully automate a high-volume inquiry while maintaining a positive experience."

— Matt E., Vice President of Operations, Lendly

2 Walk: Refine, Then Scale

The pilot generated the insights needed to improve the production experience.

RDI refined Lynn's conversational approach, expanded her knowledge base with additional FAQs and application requirements, and updated operating procedures based on what customers were actually asking.

Lendly then expanded Lynn to **100% of pending application status calls** through its primary IVR.

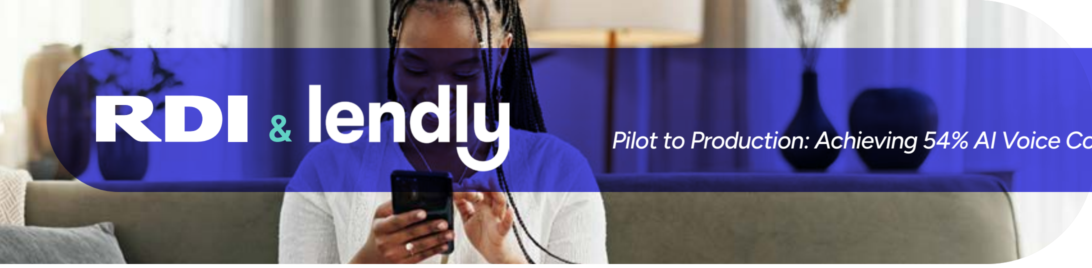
First 20 days of production:

- **7,546** calls handled
- **54%** containment
- **97%** positive or neutral sentiment
- **93%** of post-call surveys rated the experience 4 or 5 out of 5
- **64%** estimated reduction in handling costs

The result was more than a larger deployment. It was a better-performing one.

Pilot → Production

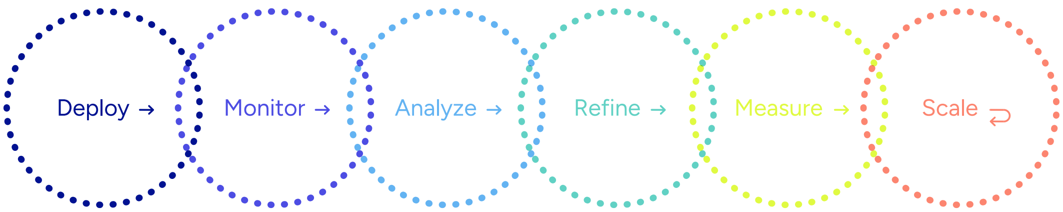
Metric	Pilot	Production
Containment	**37%**	**54%**
Sentiment	**92%**	**97%**
Cost Reduction	**24.5%**	**64%**



Continuous Improvement: The RDI Difference

AI deployment doesn't happen in isolation. RDI brings technology, operations, QA, training and development, WFM, and dedicated implementation resources together around a shared performance strategy.

Continuous Improvment Loop



Each phase creates new data that informs the next. That means the AI voice agent isn't simply launched and left to operate—it is managed against the same principles of transparency, accountability, and continuous optimization used across the contact center.

The approach also gives Lendly a clear path to connect AI performance to business outcomes, from containment and customer sentiment to handling-cost reduction and agent capacity.

The Business Impact

The production results demonstrate what happens when AI is treated as an evolving operational solution rather than a one-time technology implementation.

7,546 Calls handled in first 20 days

54% Resolved w/out live-agent intervention

64% Estimated handling-cost reduction

97% Positive or neutral sentiment

By resolving routine status inquiries without agent intervention, Lynn helped reduce repetitive call volume and create more capacity for live representatives to focus on interactions where human expertise adds the most value.

Customer feedback provided another indication of the quality of the experience: some customers believed they were speaking with a live representative until the end of the interaction, demonstrating how naturally the AI voice agent was able to handle the conversation.

"The biggest impact has been the scalability and consistency of the customer experience... The result has been a better balance between automation and personal service, improving the experience for both customers and employees."

— Matt E., Vice President of Operations, Lendly

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3 Run: Where AI Goes Next

The initial use case is only the beginning.

RDI and Lendly are expanding Lynn's capabilities to address more of the customer journey, including:

- **Application support**
  More detailed documentation and verification status
- **Loan servicing**
  Balances, payment information, and upcoming payment dates
- **Self-service**
  Additional transactions and routine customer requests

The roadmap is designed around **CX journey opportunities and measurable KPIs**, giving Lendly a structured way to determine where AI can improve convenience and responsiveness while preserving human interaction where it matters most.

> **"We are just getting started! The success of application status call handling has shown us there's an opportunity to expand AI across much more of the customer journey."**
>
> *— Matt E., Vice President of Operations, Lendly*

The Takeaway

Don't wait for ROI. Build toward it.

RDI's measured approach helped Lendly prove the value of AI with a focused use case, improve performance through real-world learning, and scale with measurable results.
The goal isn't to automate everything.

It's to automate the right things—and keep getting better.

Contact us Today to Discover how RDI can Deliver Measurable Improvements for Your Organization

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About Lendly

We set out to build Lendly because we've seen firsthand how difficult it can be to access funds quickly at fair rates, even for folks with steady income and secure jobs. We're doing things differently. We service loans and lines of credit for employees of industry-leading companies because we believe high-quality employees deserve access to high-quality loans.

Lendly offers affordable and convenient repayment while providing customers with an opportunity that may help improve their credit score.: **www.getlendly.com**

About RDI

RDI is a privately held contact center and IT firm committed to elevating the Customer Experience in its dedicated out-sourced environment. Founded in 1978 as a research analytics company, RDI's expertise has grown to include full-service Business Process Outsourcing (BPO) solutions for Contact Center support, Data Analytics, and Managed IT & Helpdesk Services. With 13 domestic and near-shore locations and over 3,500 in-house and work-from-home employees, RDI focuses on the Customer Experience and delivers value-driven results for multiple industries, including leading Fortune 500 client partners. To learn more about RDI, please visit us at:

www.rdicorp.com