



# Case Study

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Level Financing Turns 97% of  
Workable Leads Into Booked  
Calls with Meera

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## About

Level Financing is a lending company with one goal: to help Americans become financially fit and achieve full financial independence.

The company offers fast and stress-free personal loans with a strong focus on providing the best possible customer experience and a pathway to financial freedom.

Level Financing supports its customers with a rapidly growing team that includes over 150 people and 30 expert consultants specializing in debt arbitration.

## Challenge

Level Financing operates in the competitive personal lending space where speed-to-lead is critical. Customers seeking personal loans expect fast service as they shop around between loan providers. Being able to instantly contact a new lead after opt-in plays a critical role in turning them into a customer.

Level Financing was already collecting high-intent leads from a variety of online sales funnels. One problem: the company's existing processes relied on manual outreach, making it difficult to quickly contact leads when interest was high.

The company wanted to find a better and more scalable way to contact new leads immediately after opt-in without relying on manual outreach.

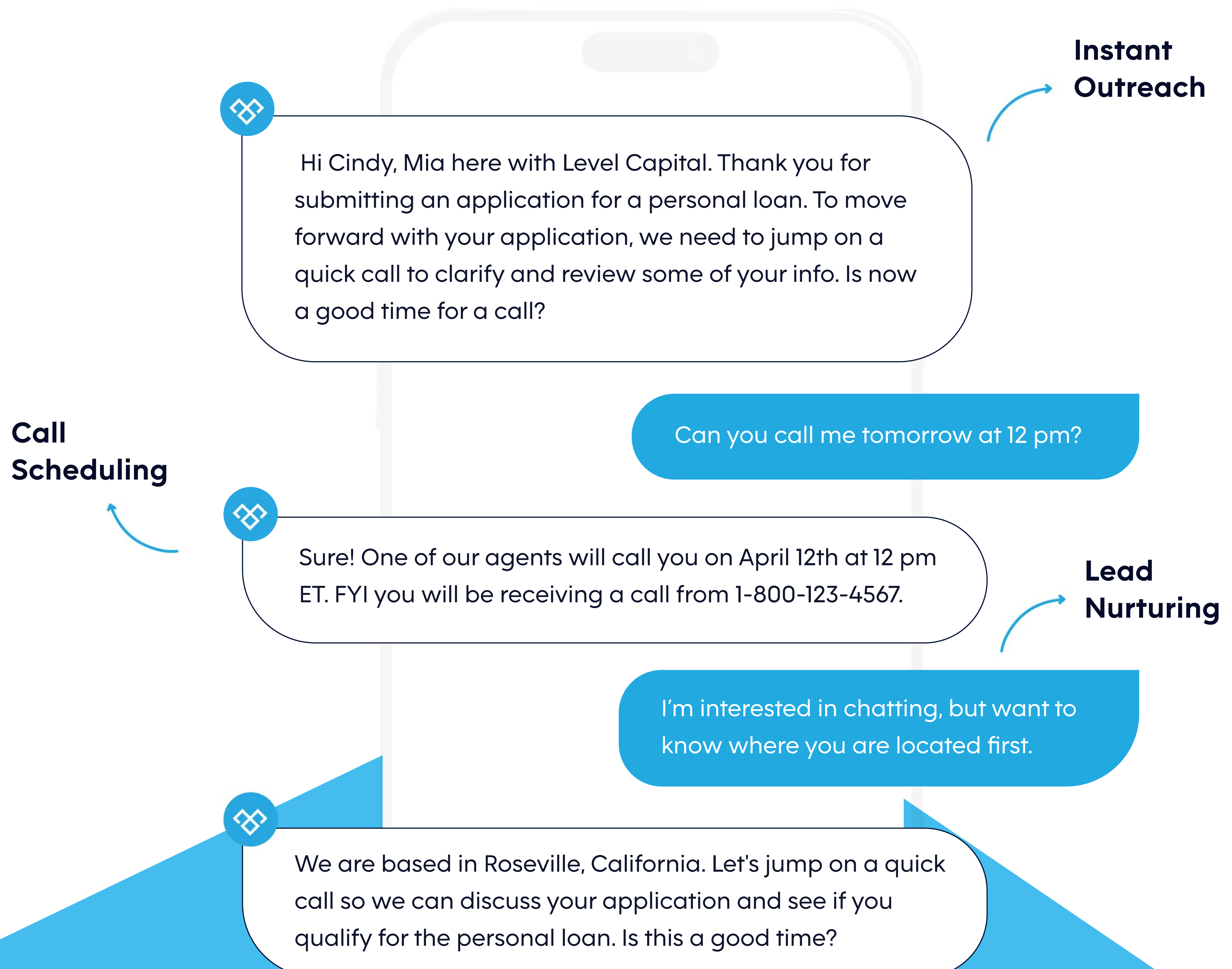


## Solution

Level Financing started exploring automation and AI for its sales outreach. Not long after, they discovered Meera.ai and saw how it automated lead engagement by contacting and nurturing leads seeking personal loans.

The company believed Meera could easily support their sales outreach processes by:

- ✓ Contacting new leads immediately after opt-in
- ✓ Explaining the loan process and answering basic questions
- ✓ Automatically scheduling calls for high-intent leads with their sales team
- ✓ Calling and transferring customers to available agents
- ✓ Sending reminders for overdue payments, incomplete applications, and upcoming calls



## Results

Level Financing now has the sales outreach support it needs – thanks to Meera’s AI texting and automation. They are now able to contact leads quickly, nurture and engage them to keep them warm, and drive more scheduled calls for qualified borrowers.

With Meera, Level Financing’s team has all the support it needs to keep leads warm and engaged. New leads are contacted within 15 seconds to nurture them when they’re most interested. Meera also provides helpful answers to questions and loops in a human agent for more complex scenarios.

Initial campaigns saw 43% of leads respond to Meera’s initial outreach to discuss a submitted application while 55% went on to become qualified leads.

Even better, 97% of those qualified leads went on to book a call with the Level Financing team through Meera. This alone saved the team countless hours in sales outreach tasks, bringing even more high-intent leads directly to their calendar with Meera’s automated, AI scheduling.

# 43%

response rate for  
new leads

# 56%

of contacted leads  
became qualified

# 97%

of qualified leads  
scheduled a call

## About Meera

Meera uses conversational AI and text messaging to automate manual sales outreach and lead engagement.

Our AI-powered platform eliminates 80% of the busy work by sending personalized messages to your leads, automatically booking meetings, taking care of back-and-forth communications, and looping in humans at the perfect time.

Discover why leading financial services companies use Meera’s friendly, human-like outreach to qualify, nurture, and engage leads.

[Book a demo](#)

