



How Revolution **2X'd** **Appointment Conversions** with Phonexa's Call Logic



Company Overview

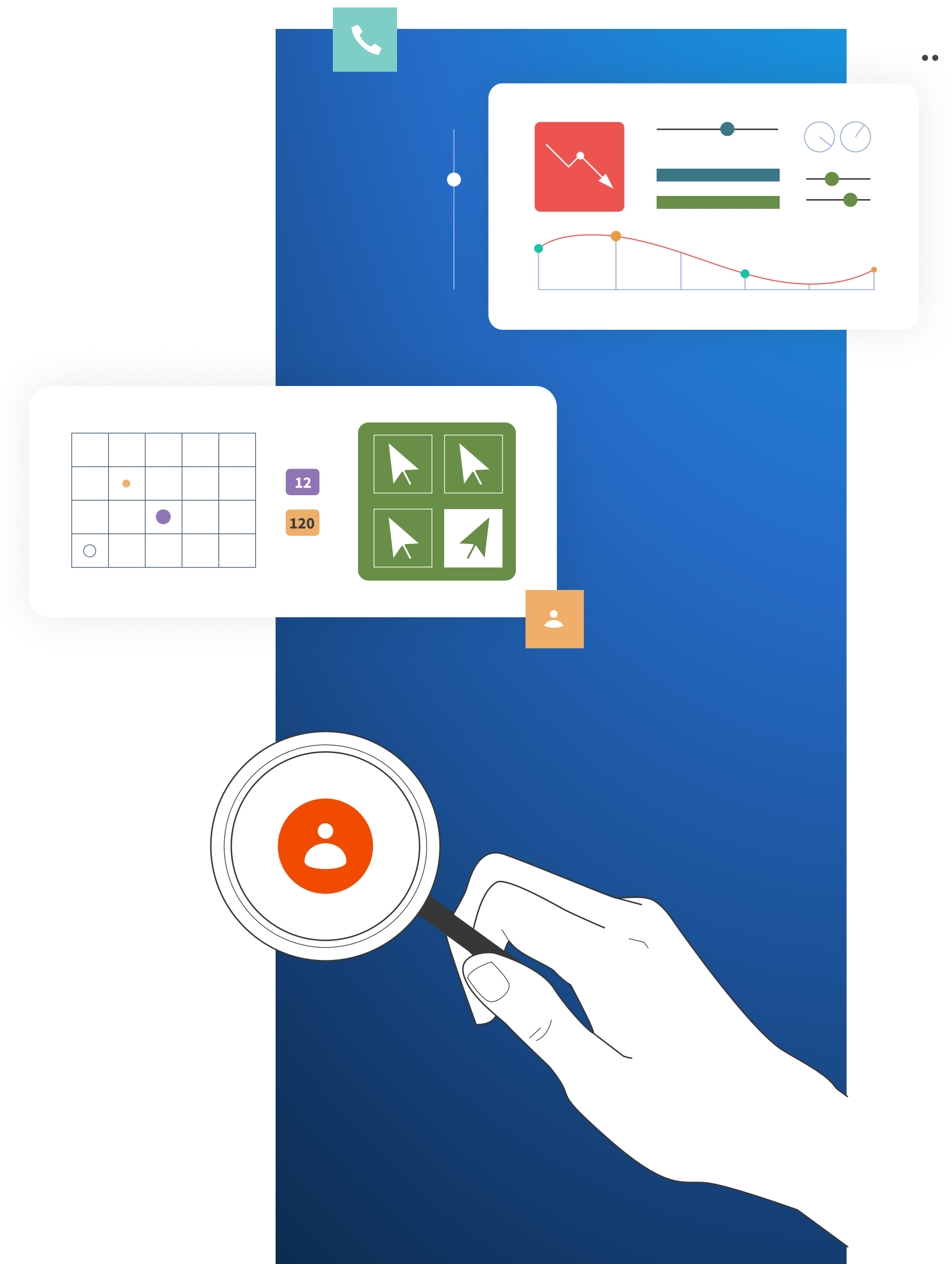
Revolution Money is a UK-based financial services provider specializing in debt solutions, including Individual Voluntary Arrangements (IVAs) and Debt Management Plans (DMPs). The company also manages redirection strategies for loan declines and operates tailored remarketing campaigns to maximize lead value.

The Challenge

Revolution Money's appointment process relied heavily on manual callbacks — a system prone to missed opportunities, inefficiencies, and a lack of management visibility. Key data such as callback success rates, redial timing, and conversion metrics were not being tracked, leaving the team without the insights needed to optimize performance.

The leadership team set out to:

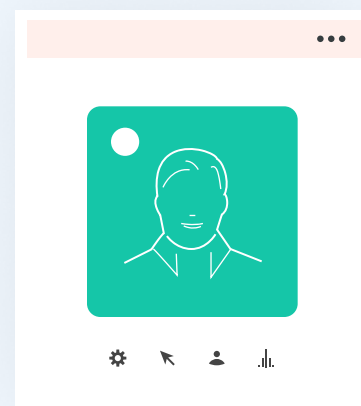
- Automate appointment scheduling and execution
- Gain full visibility into callback performance
- Reduce administrative workload on advisors
- Improve overall conversion rates



The Solution

In 2025, Revolution Money partnered with Phonexa to transform its appointment process using Call Logic, Phonexa's advanced call automation platform.

Led internally by Chris Apolon and in collaboration with Phonexa's Laura Zammit, the team launched a form-embedded booking system that automatically triggered outbound calls via Call Logic at the client's preferred time.



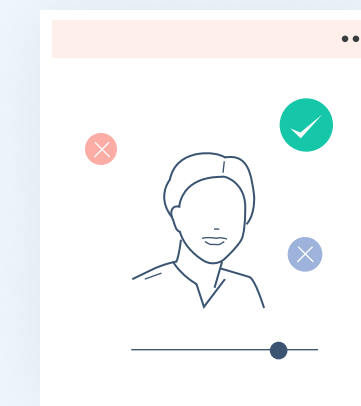
HubSolv CRM:

Synced appointment data, notes, and client status



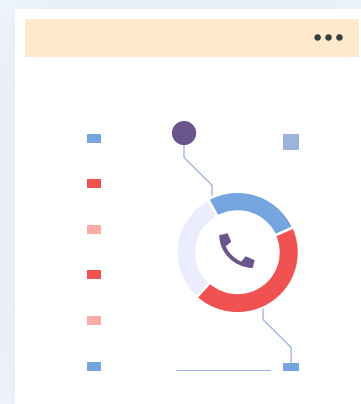
Phonexa LMS Sync & E-Delivery:

Enabled real-time updates and client outreach



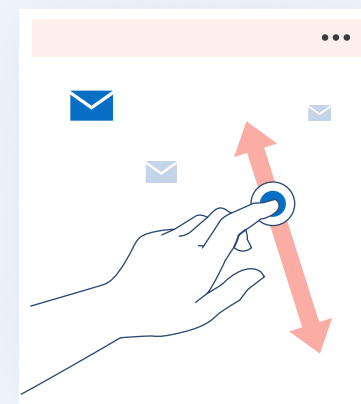
WhatsApp Tagging:

Prevented unnecessary client messages



Redistribution Logic:

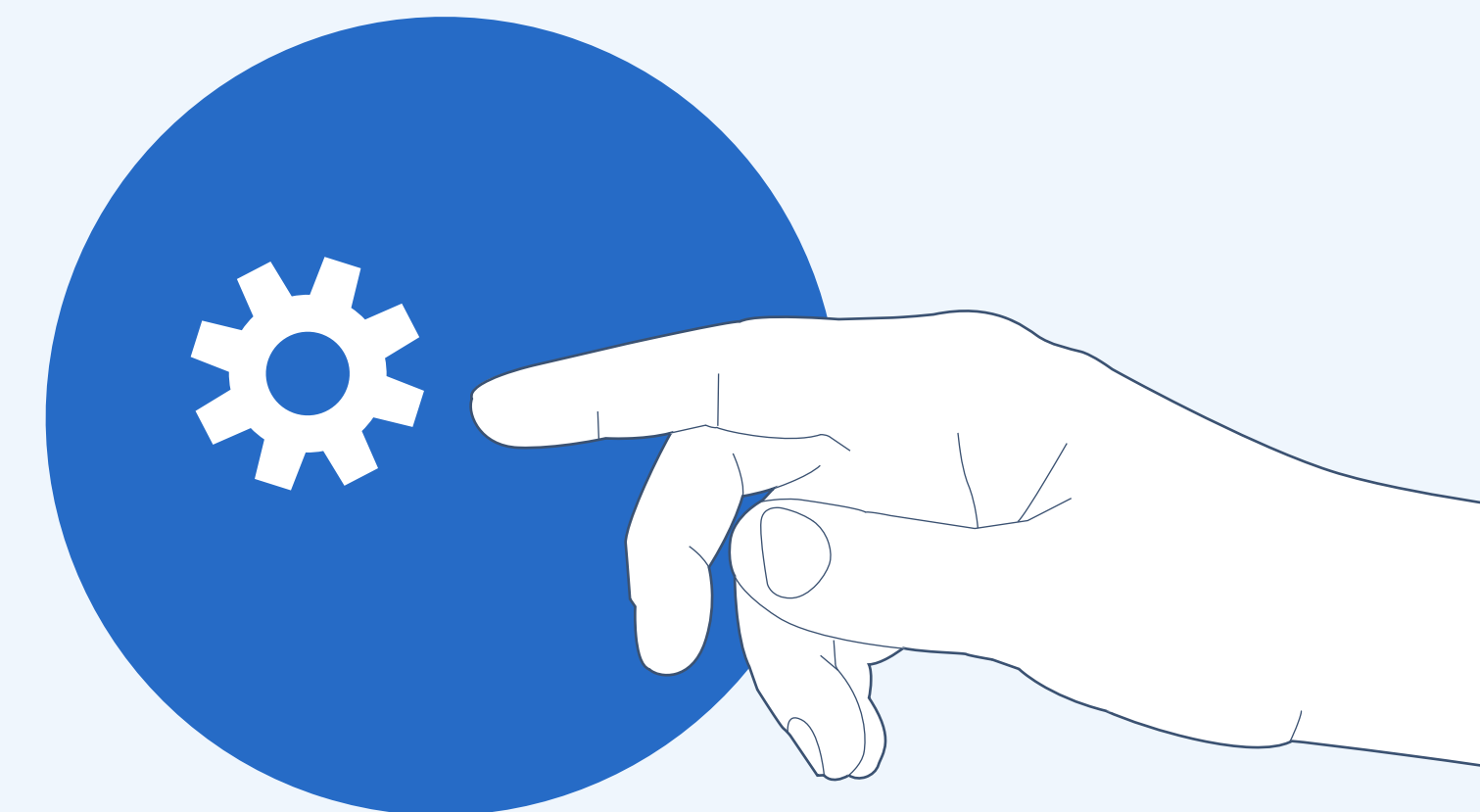
Ensured missed appointments were recycled back into the internal dialer



Email Re-engagement Strategy:

Targeted clients who missed scheduled callbacks

The system launched in August 2025 and was fully optimized by October, with zero need for manual advisor input.



The Impact

11% Combined Conversion Rate:

DMP conversions increased from 5% to 8%, and IVA conversions rose from 2% to 3%, nearly doubling total conversion rates on new leads.

43% Touch Point Rate on Appointments:

Achieved immediate or follow-up contact with nearly half of all scheduled appointments, compared to a typical 25% in similar operating environments.

Zero Missed Callbacks Since Launch:

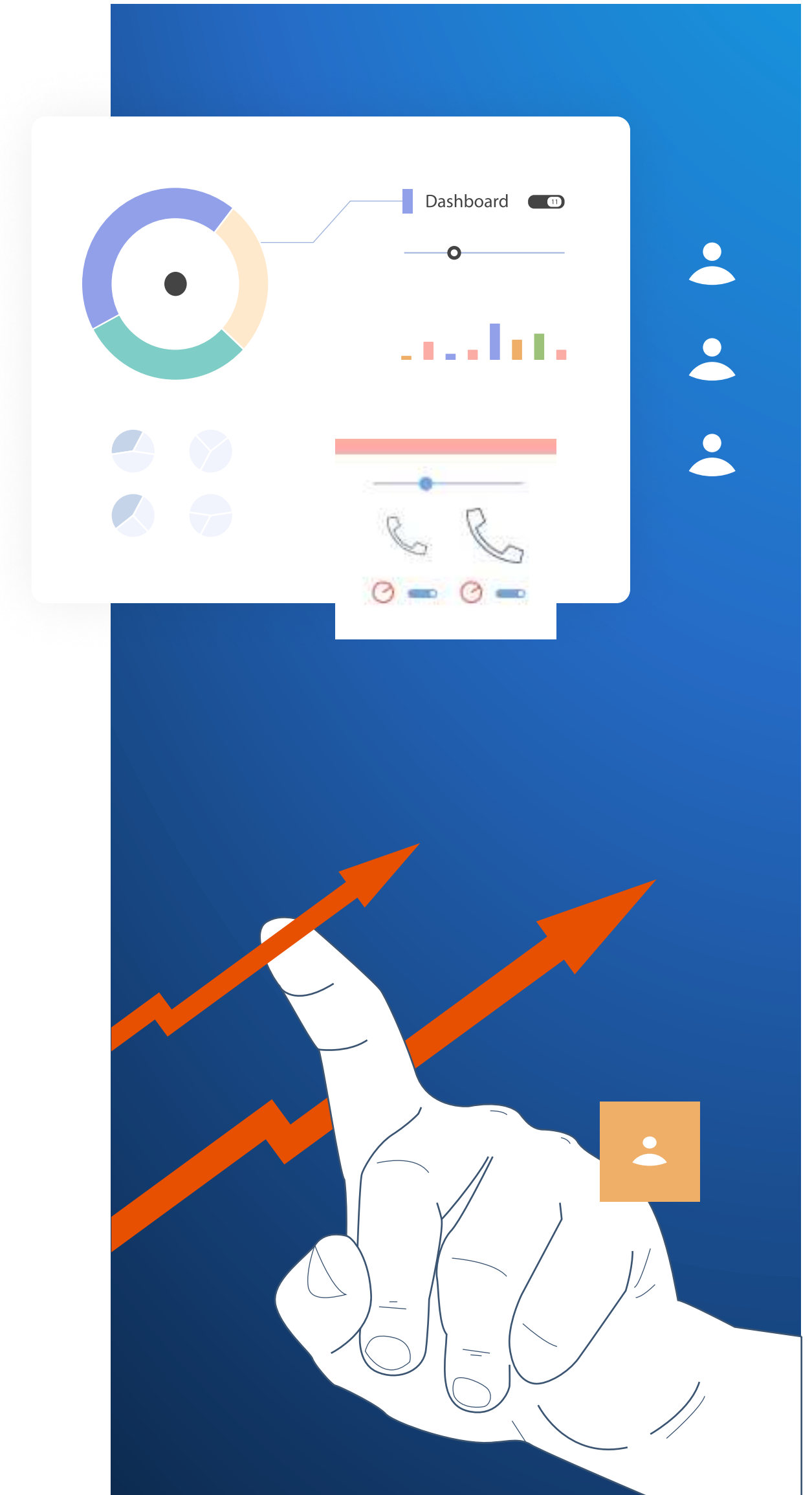
Intelligent redial logic and system automations ensured 100% follow-through on all client callbacks.

Improved Advisor Efficiency:

With automation handling scheduling, advisors focused on client cases and high-intent inbound calls, boosting productivity and performance.

Elevated Client Experience:

Clients received a more professional and timely interaction from the very first appointment, building trust and credibility from the outset.



Industry

- Financial Services / Debt Solutions

Features Used

- Appointment Booking Automation
- Call Scheduling Logic
- E-Delivery (Email & SMS)
- Hubsolv CRM Integration
- WhatsApp Client Tagging
- Redistributed Dialer Logic

Core Products Used



LMS Sync



Call Logic

