

**ABOUT THE CLIENT:**

Leading Business  
Lending Platform

**INDUSTRY:**

Online small business lending

**BACKGROUND:**

Since 2007, the company has powered growth through advanced lending technology and a constant dedication to customer service. They offer business owners a complete financing solution, including the online lending industry's widest range of term loans and lines of credit.

To date, the company has deployed over \$8 billion to more than 80,000 customers in 700 different industries across the United States, Canada and Australia.

**BOTTOM LINE**

Because of these results, the company then expanded the use of PerformLine across their sales, credit line and retention groups and began using PerformLine to monitor their chat sessions with customers.

## Delivering on the Need for More Thorough Call Review

**BUSINESS CHALLENGE**

This leading business lending platform wanted to review the calls handled by their Direct Sales and Renewals agents more extensively for compliance and QA.

Before the partnership with PerformLine, the team was manually reviewing about 10-15 calls a month for each agent, which didn't provide the level of compliance review, insights and data the company aspired to.

**THE RESULTS**

After implementing PerformLine's automated technology and ProServices coverage, the company increased the number of calls monitored, reviewed and remediated to approximately 134 per agent per month, an increase of over 760%!

- **EFFICIENT:** Now able to monitor over 9x more calls per agent per month
- **IMPACTFUL:** Average call score (based on compliance and agent performance) rose 19%
- **FLEXIBLE:** Many groups use the PerformLine platform to manage adherence to brand's overall compliance management program rules, but also are able to tailor rules to address each group's unique needs
- **COMPLIANT:** Increased adherence to the outbound call recording disclaimer to 93%



**100,000** Calls per month

**BEFORE** 

**100** (.1%)  
Calls Manually  
Monitored



**40%**  
Agents Received  
Feedback  
on at least 1 call

**AFTER** 

**26,000**  
(26%)  
Calls Monitored



**92%**  
Agents Received  
Feedback  
on at least 1 call

## Mitigate Risk. Save Money. Protect Your Brand.