

How Kotak Life scaled call audits from 5% to 100% with Convin

Automated call auditing and daily performance insights helped improve objection handling, need analysis, coaching consistency, and conversion productivity.



100%	200%	100%	30-35%
Audit coverage, up from 5%	Higher objection handling scores	Higher need analysis scores	Rise in productivity and conversions

ABOUT THE CUSTOMER

Kotak Life's Digital Business Unit

Kotak Life's Digital Business Unit manages a high-volume sales operation where every customer call carries both a compliance obligation and a revenue opportunity. Agents must understand customer needs, follow business-critical scripts, and meet regulatory requirements in every interaction.

Before Convin, quality assurance depended entirely on human reviewers. The process could sample only a small fraction of calls, limiting visibility into agent performance, compliance risk, and missed conversion opportunities.

THE CHALLENGE

Limited visibility across a high-volume sales operation

- 95% of calls went unreviewed**
Manual quality checks covered approximately 5% of total calls, leaving most customer interactions outside the audit process.
- Feedback arrived too late**
Agents received coaching only once a fortnight, making it difficult to correct behavior while conversations were still recent.
- Scoring varied by reviewer**
Manual audits introduced human bias and subjectivity, resulting in inconsistent performance evaluations across the team.
- Compliance and revenue risks stayed hidden**
Unmonitored calls allowed fatal errors, compliance gaps, and missed revenue opportunities to remain undetected for weeks.

CONVIN'S SOLUTION

From manual sampling to continuous QA

Kotak Life implemented Convin's agentic AI platform to automate call auditing and strengthen its coaching workflow. The teams ran an eight-month pilot to adapt the platform to the specific requirements of insurance sales before scaling the deployment. The platform's flexibility, Convin's partner-first implementation approach, and the ability to replace subjective reviews with objective AI-driven scoring were central to the decision.

- 100% automated call auditing**
Every call is evaluated against Critical to Compliance, Critical to Customer, and Critical to Business parameters.
- Objective, customized scoring**
Customized dashboards provide visibility into Need Analysis and Objection Handling at the agent, team, and organization level.
- Daily performance insights**
Agents receive feedback at the end of each day, giving them a clear view of where performance is falling behind.
- Immediate compliance alerts**
Managers are notified about fatal compliance issues immediately instead of discovering them weeks later.

BUSINESS IMPACT

Measurable gains across QA, sales, and coaching

20x Complete visibility & faster risk response - Audit volume increased 20x, from 5% to 100% of all calls. - Human bias in QA scoring was effectively eliminated. - Managers can intervene immediately when fatal errors are detected.	200% Stronger sales conversations - Need Analysis scores improved by 100%. - Objection Handling scores increased by 200%. - Net Promoter Score improved by 10% absolute.	35% More consistent coaching & productivity - Per-agent productivity and lead-to-login conversions rose by 30% to 35%. - Agents now have a clear, real-time view of where they are lagging. - Coaching is consistent, objective, and fair across the team.
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Convin has now become their sales buddy who is always there on call with them. It's also their sales guru who helps them rectify their sales pitch.

Amit Raje
VP, Ecommerce Channel, Kotak Life

Kotak Life now audits every sales call, gives agents daily performance insights, and enables managers to act on critical compliance issues as soon as they appear.

INDUSTRY Insurance / BFSI	COMPANY Kotak Life, Digital Business Unit	USE CASE Automated Call Auditing & Real-Time Coaching	SOLUTION Convin Agentic AI
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