

BankSathi Reconnects with Dormant Users Using Personalized Audio Journeys, ROAS Surges By 4.5X



When a Human Voice Beats Every Offer

Many users at BankSathi had once been active, earning through the platform and trusting the process. But somewhere in the noise, they fell silent. Instead of chasing them with urgency or discounts, BankSathi took a bold, empathetic route—using voice notes that felt real and personal.

Built on WebEngage, the campaign automated audio messages tailored to each user—triggered on WhatsApp based on behavior, language, and product preference. No bots, no templates. Just a voice that said: "We remember you."

10%

Reactivation

12.9%

Reply Rate

4.5X

ROI

About BankSathi

BankSathi is a financial advisory platform that empowers individuals—especially across tier 2, 3, and rural India—to become financial advisors. With over 2 million advisors and 60 lakh customers, it enables grassroots entrepreneurs to recommend products like savings accounts, credit cards, and personal loans to their networks.



The Challenge: Dormant Value



A large set of previously active users had stopped engaging for 4–6 months. These weren't cold leads—they knew the platform, had earned from it, but weren't returning.

Now the real hurdle wasn't strategy—it was execution.

Fragmented tools. Long lead times to experiment. No way to personalize at scale without tech dependence.

BankSathi needed to shift from one-size-fits-all to one-to-one, without slowing down.

Rather than push product messages, BankSathi focused on one thing: make the message feel like it was meant for them.

📌 **Key Insight:** These users already understood the value proposition—they needed reconnection, not re-education.

From Cold Segments to Conversations That Clicked

Instead of using discounts or spammy nudges, BankSathi reframed its outreach philosophy:

Talk to the user, not at them.

**Use voice—not as a channel,
but as a bridge.**

Scale trust like you scale code.

How it worked:



Behavior-Based Segments

Built using inactivity, preferred product, signup source, and geography.



Custom Attributes

Gender, name, product interest, and language used to drive contextual content.



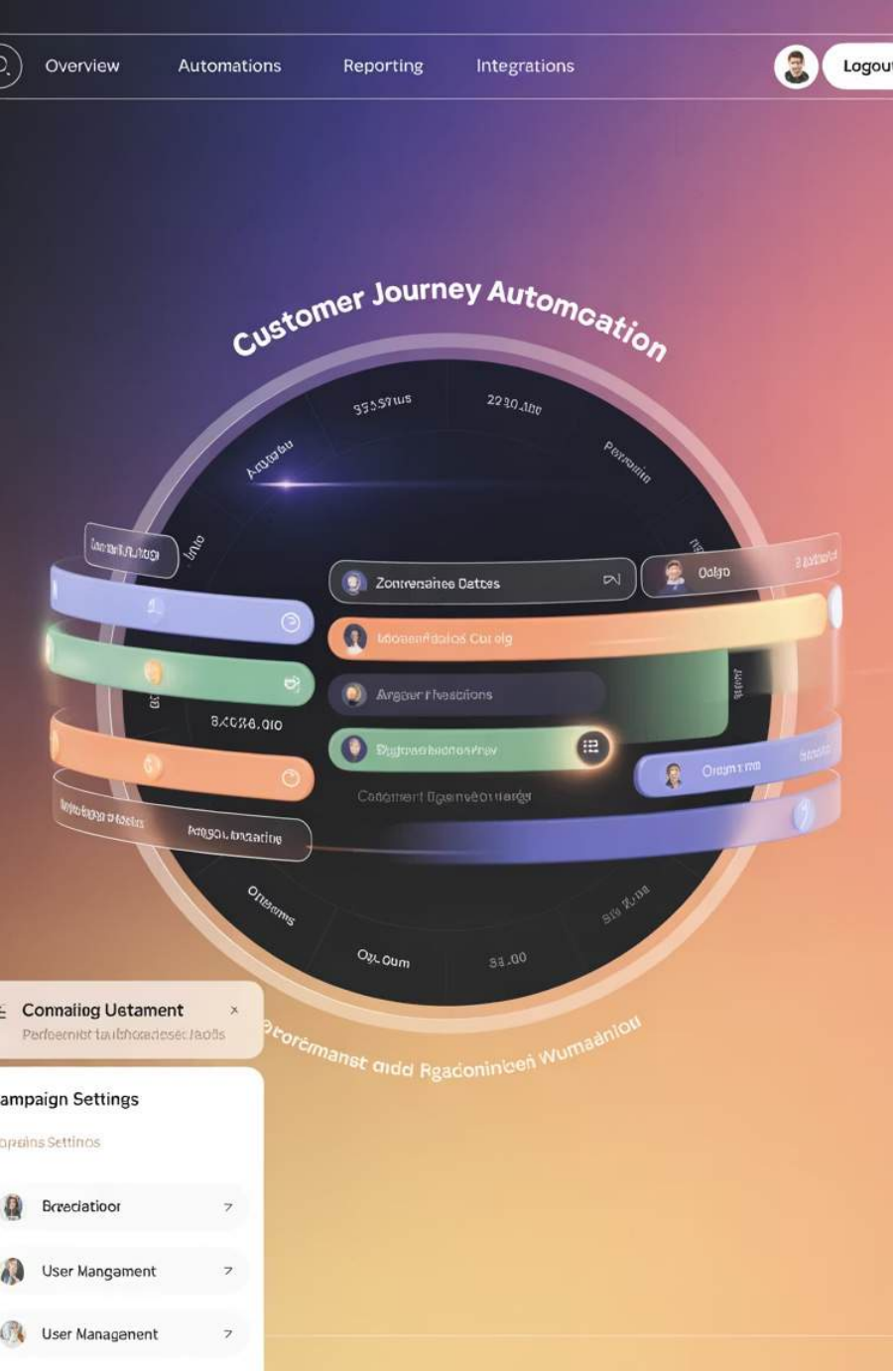
Audio Messaging

Friendly, human voice notes sent in Hinglish on WhatsApp.



Journey Designer

Automated, multi-step flows triggered based on user behavior—reply, click, or silence.



The Hidden Transformation: From Reactive to Proactive CRM

WebEngage didn't just help BankSathi run a campaign—it reshaped their marketing motion:



Manual & Reactive CRM

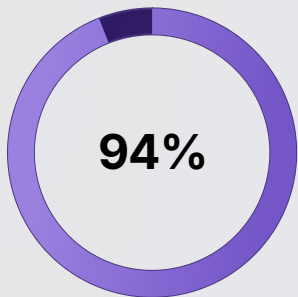


Real-time & Proactive CRM

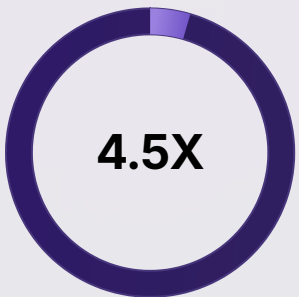
- Funnels and cohorts now drive everyday experimentation
- Journey Designer is used to run 1:1 personalization without delays
- RCS, SMS, and Email are explored as new channels, unified under one platform
- No Engineers Needed: Every iteration, experiment, and flow built and optimized without tech handoffs

Results That Spoke for Themselves

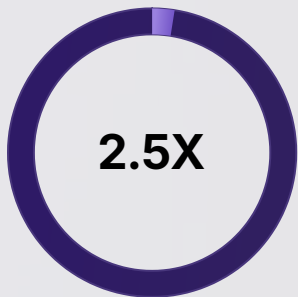
Metric	Goal	Achieved	Lift
Reactivation Rate	5%	9.71%	+94.2%
WhatsApp Delivery Rate	60%	91.89%	+53.1%
WhatsApp Open Rate	65%	72%	+10.8%
Response Rate	5%	12.9%	2.5X
Return on Ad Spend (ROAS)	20	90	4.5X



Reactivation Lift



ROAS



Response Rate



Why WebEngage Was the Right Partner

WebEngage became our central brain for engagement, helping us talk to the right user at the right time – without spamming everyone. Our time to go live & amplify campaigns was a hassle, frustrating, and time-consuming. Enter WebEngage, and in the span of a few months, we're at a relaxed stage.

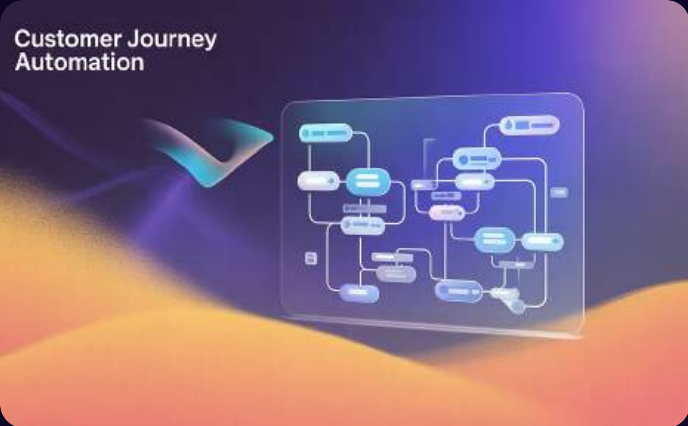
The Challenge

- Fragmented automation & reporting in legacy tools
- Slow implementation cycles
- Limited personalization capabilities

The Solution

- WebEngage offered faster go-lives, flexible journeys, and deep behavioral modeling
- A single stack for personalization, reporting, and omnichannel messaging

What Powered This



Journey Designer



WhatsApp + Voice Integration



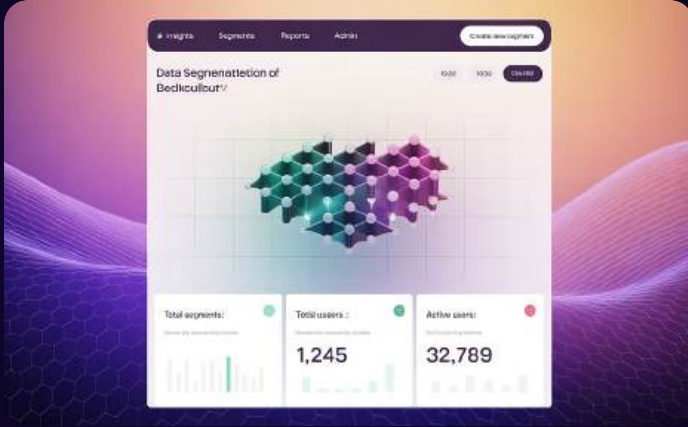
Cohort Analysis & Funnel Tracking



Custom Events & User Attributes



Omnichannel Delivery



Advanced Segmentation + Reporting



Why It Worked: Human Connection at Scale

Right message, right moment

Powered by behavior-triggered logic

Human tone over brand voice

Recorded messages made users feel remembered

Hyper-personalization at scale

Thanks to WebEngage's flexible journey builder

The campaign succeeded by prioritizing authentic human connection over traditional marketing tactics, proving that sometimes the most effective technology is the one that feels least like technology.

From the BankSathi Team

WebEngage became our central brain for engagement—helping us reach the right user at the right time, without spamming everyone. Earlier, going live and amplifying campaigns was a hassle—frustrating and time-consuming. Enter WebEngage, and within a few months, we found ourselves in a much more relaxed and confident stage.

I'd especially like to highlight the team I've been working with—from the initial interaction with the sales team while we were evaluating CDPs/Martech, to onboarding, to the Customer Success team. S

hout-out to everyone involved—they worked as if they were part of our own mission. The support and insights we've received have been more valuable than anything.

Also, the community is amazing. Everyone I interact with at WebEngage is aligned with our goals and KPIs. It's a high-energy team that operates with first-principles thinking—challenging your assumptions and helping you see the bigger picture. That's the level of expertise you get when you partner with something truly global.

Puneet Khatri | Manager, CX, Growth Marketing, BankSathi





What Our Growth Consultants Say

Working with Banksathi has been incredibly rewarding. From aligning on aggressive activation goals to setting up scalable automations across channels, it's been a true partnership. Their team's clarity and speed made it easy to iterate fast and ship impactful campaigns."

Anubhav Rana | Senior Manager, Growth Consulting, WebEngage

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