

industry case study

HEALTH INSURANCE



CASE STUDY

THE NEED

A U.S. national health insurance distributor needed a more user-friendly lead management and CRM solution.

THE SOLUTION

The VanillaSoft solution with its robust feature set has them covered.

THE CLIENT

ACTIVE # OF USERS



50 - 100 Users

MAIN OFFICE




Dallas-Ft. Worth, Texas

REGIONS SERVED



United States

PAIN POINT



Difficult to Use Software



OUTBOUND CALLING FOCUS



REMOTE AGENTS

THE SOLUTION

CUSTOMER RATINGS

EASE OF USE & ONBOARDING



SUPPORT & CUSTOMER SERVICE



CLIENT-REQUIRED FEATURES

- ✓ Ease of Use/Administration
- ✓ Lead Importing/Exporting, Routing & Distribution
- ✓ Appointment Setting
- ✓ Logical Branch Call Scripting
- ✓ Custom Fields & Data Capture
- ✓ Auto Dialing (Progressive & Preview)
- ✓ VoIP Features & Integration
- ✓ Email Templates & Document Libraries
- ✓ Real-Time Dashboards & Web Reporting

SOLUTION BEFORE VANILLASOFT

✗ 3C LOGIC

OTHER SOLUTION CONSIDERED

✗ SALESFORCE.COM

CUSTOMER QUOTE

"We love your system. It has helped increase our productivity immeasurably. I will be meeting with a number of other prominent Division Leaders from time to time. When I get the opportunity to do so, I will pass along our very positive experience with your company. Thank you very much for your great service and for your great product."

START YOUR FREE TRIAL TODAY

www.vanillasoft.com/products