THE SALT GROUP
Increased Productivity by 100%

OVERVIEW

The SALT Group provides its clients with the most efficient and accurate Expense Reduction Reviews available today. Transactional over-payments occur on a regular basis due to a variety of reasons. That's why nine out of every ten reviews performed by The SALT Group result in benefits and savings. From sales & use tax reviews to reducing expenses in telecommunications, waste, and energy bills, The SALT Group provides non-invasive, turnkey reviews to secure clients' maximum savings and benefits.

BUSINESS CHALLENGES

The SALT Group had been using a premise-based CRM to manage its sales and appointment setting efforts, but agents found the system to be less than user friendly. In addition to a lack of user friendliness for agents, the management team was unhappy with the premise-based CRM's reporting capabilities – custom reports required a consultant to create them. The SALT Group also began thinking about the benefits of moving to the cloud instead of having software on an internal server.

In addition to concerns with the existing software, The SALT Group needed a robust solution that could handle three different types of sales efforts: (1) a call center for appointment setting, (2) a consulting group that handles appointments on site at the customer's location, and (3) a new inside sales team focused on acquiring reviews that are completed totally via phone and email/internet.

The SALT Group began looking at big name traditional 'list-based' CRM platforms first, but none of those solution providers had exactly what was needed. They all offered to provide customization to make their solution work, but that meant more money and longer time until implementation. After researching other appointment setting alternatives, The SALT Group found VanillaSoft. It met almost all requirements upfront and the customization required was minimal – and didn't require any IT resources.

> *The VanillaSoft team took time to understand the complexities of our business. They spent a lot of time with us to help us achieve our ideals.*
>
> Carrie Griffin
> VP of Business Development
> The Salt Group

VanillaSoft Highlights

VanillaSoft helped The SALT Group double productivity and reduce personnel turnover.

- Queue-based lead routing allowed appointment setters to work more efficiently.

- Custom reporting helped managers identify personnel that needed more training.

- Easy-to-use interface reduced time spent onboarding and improved user engagement.

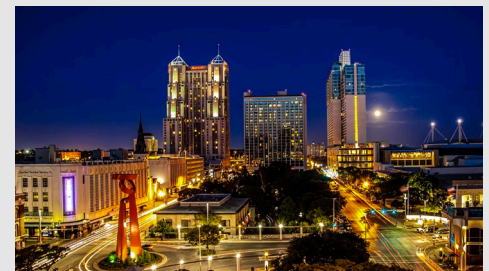- Individual agents increased their commissions improving overall morale.

> *VanillaSoft has the easiest, quickest implementation, and customizations can be done by a non-IT person like me. If I can go in and develop specific customizations, anybody can.*
>
> Carrie Griffin, VP of Business Development
> The Salt Group

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VANILLASOFT IMPACT

The SALT Group began a three-phase implementation with VanillaSoft. In June 2015, the appointment setting call center began using VanillaSoft followed by the inside sales team in October 2015. The onsite consultants will begin using VanillaSoft in Q2 2016.

The SALT Group expected a 30 – 40% improvement in productivity with its call center. Instead they realized a 100% improvement. Even with the same headcount, the number of appointment setting calls doubled after VanillaSoft was implemented. In addition to improved productivity, The SALT Group was surprised to see a reduction in turnover. This can be attributed directly to the queue-based lead management functionality of VanillaSoft. Appointment setters no longer have to hunt for the right lead to call – the right lead is automatically pushed to them. Managers also gained access to reporting that helped them identify which reps needed more training. Overall, agent quality has improved along with agent satisfaction. The easy-to-use VanillaSoft solution has improved their productivity, allowed for individualized training, and helped agents make more money in this commission-based sales environment.

In addition to improvements for existing call agents, The SALT Group has been able to cut down training time for new hires. Before VanillaSoft new agents spent three days learning the old software, but after implementing VanillaSoft, The SALT Group training program has shortened to only one half-day thanks to VanillaSoft's ease of use.

SPOTLIGHT ON
The Salt Group

The SALT Group helps companies save money lost on transactional over-payments.

Industry:
Finance

Headquarters:
Kerrville, TX
Call Center in San Antonio, TX

Founded:
1988

Started Using Vanillasoft:
2015

Specializing in:
• Sales & Use Tax Reviews
• Energy, Waste, and Telecommunication Bill Reviews
• B2B Prospecting

> *When we first began using the queue-based routing to push leads to our agents, we were hesitant – a little anxious about letting the system choose leads for reps to call. Now with the incredible productivity gains and efficiencies we've achieved, we don't know how we lived without it!*
>
> *Carrie Griffin, VP of Business Development*
> *The Salt Group*

VANILLASOFT FEATURES USED MOST FREQUENTLY

• **Appointment Setting**

• **Progressive Dialing**

• **VoIP**

• **SmartCaller ID**

• **DocuSign® Integration**