



VANILLASOFT CENTRALIZED CONTROL

It's the cold, hard truth...sales is more than just picking up the phone and making a sale—it's all about process. The more disciplined and structured your sales team is, the better they will perform. This is even more true during the initial engagement phase, before “personal charisma” even has a chance to shine through.

Paired with VanillaSoft's live monitoring and granular reporting capabilities, sales leaders are provided with in-depth insights into what—and who—is working.

Only VanillaSoft provides this level of sales process and performance control. Stop entrusting your leads and how they are handled to the whims of your sales agents. Ensure your processes are followed and get the most out of your leads with VanillaSoft.

Without a disciplined structure built into your sales process, revenue projections are eroded by:

- Slow response to new leads
- Cherry-picking the ‘best’ leads
- Lack of follow-up
- Failure to stay on message
- Low activity
- Distraction and inefficiency
- Lead hoarding
- Difficult-to-use sales systems and processes

Take command of your sales processes and eliminate these problems with VanillaSoft.



CONTACT ROUTING CONTROL



- Lead prioritization in real-time based on priority filters of your choosing: lead age, contact age, industry, location, previous contact results, and virtually any other data point or activity (such as opening an email)
- Lead distribution segmented by agent to match skills, expertise, or as a reward
- Lead re-prioritization and routing distribution based on engagement results
- Lead distribution based on prioritization - call the newest/best leads first
- Lead distribution follow-up minimums enforced
- Lead distribution based on contacts' time zone to prevent ill-timed calls
- Lead distribution follow-up frequency (minutes, hours, days, weeks)
- Lead management ensures all leads are contacted (even low-priority leads)
- Lead management enforces Telephone Consumer Protection Act (TCPA) and Do Not Call list (DNC) compliance

MESSAGING CONTROL



- Control messaging and positioning via dynamic call scripts that ensure the right response to each prospect's reaction
- Control email attachments via a library of approved content
- Control messaging and positioning with templates for email and SMS
- Centralize all emails to come from one email address, or allow agents to send from individual email addresses

REPORTING & MONITORING



- Track agent activity including:
 - Contact call duration (time on screen)
 - Call attempts
 - Engagement results
 - Emails sent
 - Data collection
 - Talk time (time on call)
 - SMS sent
 - Login / logout times
- Identify agents simulating & falsifying activity
- Track bookings
- Campaign, team, and agent A/B testing analysis

AGENT CONTROL



- Segment contact routing down to the individual agent level
- Control follow-up actions based on result reporting
- Control whether agents are allowed to own a contact throughout the entire engagement cycle
- Prevent users from searching for contacts and lock them into system lead routing exclusively
- Enforce time limits between high-priority lead routing to the same agent to prevent agents from abusing lead ownership capture by processing leads rapidly and falsely
- Control the channel used for outreach
- Control options for reporting results
- Enforce contact engagement results reporting
- Change contact ownership based on call result, data collected, or other prioritization filters
- Release ownership if the agent fails to keep up the engagement cadence
- Restrict agents' ability to search for contacts by applying a search quota
- Apply contact quotas to prevent abusive lead ownership capture by agents who are falsely or rapidly processing leads

VANILLASOFT CONNECT (VOIP) CONTROL



- Monitor agent calls as they are happening
- Break-in on any call when necessary
- Whisper to or coach agents during a call
- Record calls for future analysis and coaching
- Drop pitch-perfect and management-approved pre-recorded voicemails

SYSTEM CONTROL



- Compliance enforcement with various regulations including TCAP, HIPAA, and PCI
- Integration flexibility removes the need for agents to access the full CRM
- Cloud-based system ensures enforcement of controls regardless of agent location



INTERFACE CONTROL



- Easy onboarding takes most agents only 30 minutes to become familiar with VanillaSoft
- Control agent access to information by restricting individual fields and pages
- Control agent access to all or portions of the contact's engagement history to prevent prejudicial cherry-picking
- Limit the number and duration of appointments agents can schedule per day
- One pane for all the information an agent needs—including embedding external websites—to prevent time wasted searching other applications
- Control agent access to other contacts at the same organization (corporate view)
- Control access to team members' calendars
- Enforce the collection of critical and qualifying data during engagements

AUTOMATION EFFICIENCY



VanillaSoft automates:

- Lead prioritization
- Lead distribution
- Follow-up emails and SMS
 - Call, drop a recorded voice message, send a follow-up email, and SMS in under 30 seconds and less than 5 mouse-clicks
- Drip campaigns
- Phone dialing
- Voicemail drops
- Appointment invitations
- Appointment reminders
- Calendar sync and sharing
- CRM updates
- Data collection