

industry case study

FINANCIAL SERVICES



CASE STUDY

THE NEED

A merchant services company needed a hosted CRM & lead management solution that offers scripting and call recording.

THE SOLUTION

VanillaSoft's Logical Branch Scripting, Intelligent Call Recording, and other easy-to-use features fit the bill.

THE CLIENT

ACTIVE # OF USERS



>100 Users

MAIN OFFICE



McLean, Virginia

REGIONS SERVED



North America

PAIN POINT



No Scripting & No Call Recording Tool



OUTBOUND & INBOUND CALLING



ONSITE & REMOTE AGENTS

THE SOLUTION

CUSTOMER RATINGS

EASE OF USE & ONBOARDING



SUPPORT & CUSTOMER SERVICE



OTHER SOLUTION CONSIDERED

✗ SALESFORCE.COM

CUSTOMER QUOTE

"We are very happy with VanillaSoft Professional. VanillaSoft is software created by call center experts for call center professionals. They understand the user experience and delivered on fulfilling all of my purchase criteria and more. Functionality plus ease of set up, smooth onboarding, and excellent customer service and support makes VanillaSoft a no-brainer."

CLIENT-REQUIRED FEATURES

- ✓ Ease of Use/Administration
- ✓ Lead Importing/Exporting, Routing & Distribution
- ✓ Appointment Setting
- ✓ Logical Branch Call Scripting
- ✓ Custom Fields & Data Capture
- ✓ Digital Call Recording
- ✓ Email Templates & Document Libraries
- ✓ Real-Time Dashboards & Web Reporting

START YOUR FREE TRIAL TODAY

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