

## industry case study

# BUSINESS DEVELOPMENT FIRM



# CASE STUDY

## THE NEED

A Canadian business development firm was using a home-grown solution that lacked key features for managing lead generation, pipeline management and appointment setting.

## THE SOLUTION

VanillaSoft, a software-as-a-service solution for inside sales & appointment setting, offered a feature-rich, scalable alternative.

## THE CLIENT

**ACTIVE # OF USERS**



<10 Users

**MAIN OFFICE**




Ottawa, Ontario

**REGIONS SERVED**



North America

**PAIN POINT**



Current Solution Not Scalable



**OUTBOUND CALLING FOCUS**



**SINGLE LOCATION**

## 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
- ✓ Custom Fields & Data Capture
- ✓ Digital Call Recording
- ✓ Auto Dialing (Progressive & Preview)
- ✓ VoIP Features & Integration
- ✓ Real-Time Dashboards & Web Reporting

#### SOLUTION BEFORE VANILLASOFT

✗ HOME-GROWN SOLUTION

#### OTHER SOLUTION CONSIDERED

✗ SALESFORCE.COM

## CUSTOMER QUOTE

"We had originally built our own solution in house because it was difficult to find a turn-key solution for outbound sales calls that met our specific needs. As we began growing, we were thrilled to find VanillaSoft. It was easy to implement into a relatively complex organizational structure and met all of our needs when it came to features and reporting. It is definitely a solution built for inside sales and appointment setting professionals"

# START YOUR FREE TRIAL TODAY

[www.vanillasoft.com/products](http://www.vanillasoft.com/products)