

Case Study

National Cost

Shaving Time and Effort off the Sales Process

OVERVIEW

National Cost is a Florida-based engineering company specializing in commercial property assessments, condominium inspections, leed inspections, and cost segregation studies. The company provides engineering reports to save on tax returns and improve cash flow. National Cost has two primary services: Epect 179D energy studies and engineered-based cost segregation studies.



BUSINESS CHALLENGES

The company was searching for an automated sales CRM software that would be easy to use, with limited amounts of training. It also wanted a system that would make decision making simple for sales reps by automatically routing the right leads to their queue so they wouldn't have to choose, and had the capability to send and track emails.

The most important issue was having the capability for all salespeople to access and manage over 145,000 leads in a central place, using the same sales process, and communicating a consistent message to prospects and clients. National Cost also needed the ability to easily train new salespeople, group leads, recruit personnel from other areas, as well as provide quick customer support for client calls. Immediate and complete access to contact notes during a call is a crucial part of its business when communicating with customers.

VANILLASOFT'S IMPACT

VanillaSoft solutions for National Cost:

- VanillaSoft's easy-to-use, user-friendly layout enabled the company to train new employees and get them up and running in two hours. The company experienced significant time and cost savings for training

“We decided on VanillaSoft because of its rules-based routing control, easy training capabilities, integration with other software, and pleasing look and feel.”

Lee Ferry, President
National Cost

“VanillaSoft is the perfect sales tool to help sales reps to stay on top of clients, identify prospects faster, and focus sales-people on the main goal – closing deals!”

Lee Ferry, President
National Cost

SPOTLIGHT ON NATIONAL COST

National Cost's tax advisory and engineering experts help clients find the hidden capital inside their company.

Industry: Business Services

Headquarters: Deerfield Beach, Florida

Founded: 2009

Acquired Vanillasoft: 2012

Website:
nationalcost.com

Specializing in:

- Commercial property assessments
- Condominium inspections
- Epect 179D energy studies
- Cost segregation studies
- IRS repair regulations
- Leed inspections

- Queue-based routing and rules for leads automatically tracks and predetermines the next-best lead after the result of the last call, leaving decision making to managers rather than the sales reps
- The company can group leads and control them according to different teams and priorities with Vanillasoft's automated team escalator
- A centralized database in the cloud gives all sales reps activity access to the same information at the same time across remote locations
- Customized, automated emails with pre-defined templates for the different result codes created by management ensure that the correct message is conveyed to the prospect every time



VanillaSoft features used most often:

- Email Templates
- Custom Field Edit and Update
- Preview Calling
- Data Query and Reporting
- Email Templates
- Lead-based Routing

ABOUT VANILLASOFT

VanillaSoft is the industry's leading smart software for sales by phone. Its intuitive and easy-to-use queue-based features for inside sales takes the best of CRM, lead management and telemarketing applications to create the most productive phone sales environment available today.

VanillaSoft's core philosophy and development process is centered around one concept: the power of simplicity. It is through this principle that VanillaSoft offers a queue-based platform that allows our customers to see increased productivity, higher contact rates, deeper list penetration, greater management control over the sales process, better sales accountability tools, and a faster speed to lead like no other.

Learn more about how your organization can benefit from VanillaSoft:

Phone: 866-763-8826
Email: sales@vanillasoft.com
Web: vanillasoft.com