

CASE STUDY

FENDER INSURANCE AGENCY

500% SALES INCREASE WITH VANILLASOFT

Fender Insurance Agency was looking for a solution that could accomplish three key requirements: offer an all-in-one solution for sales communication methods (email, phone, and text messaging), provide scalability for its marketing efforts, and enable its team to follow up on new leads immediately. VanillaSoft filled each of those needs.

EXECUTIVE SUMMARY

David Fender founded [Fender Insurance Agency](#) in January 2019 as a new chapter in his 20-year career. He spent a year utilizing marketing tactics that had served him well when he started his career, however it was clear that those methods were not generating the results they had in the past. So David decided to modernize his sales process and utilize purchased internet leads. He then faced a new challenge – how to make the most of that investment.

“ I couldn't even imagine what it'd be like to try to run internet leads with basic email, tracking on your own diary system when to call people back. If they don't answer on the phone, what do you do? Pick up your cell phone and try to text them? Then you go with your email system, and you type out an email to them? I mean, it would take forever.”

VanillaSoft provided the solution. Not only is it an all-in-one platform for all communication methods, but it also gives him unprecedented control over his marketing costs, and access to his buyers when they are most likely to buy. The net result was a 500% increase in sales per month agency-wide, and led to three new hires to keep up with the agency's success.



HOW TO BECOME A 21ST CENTURY INSURANCE AGENCY

Fender Insurance Agency is one of the first agencies in Florida to offer Farmers Insurance products. The opportunity to take a known brand into a new market is rare in insurance, and David was confident about his chances for success. He deployed a marketing and client acquisition plan based on decades of experience. It included community partnerships, local advertising, and business networking.

After a year of disappointing results, David noticed many of his peers in other metropolitan areas had started utilizing purchased internet leads from vendors like Everquote. Twenty years ago, insurance was sold through community relationships and local marketing. Today the industry has been revolutionized with the rise of online quote aggregators that generate leads and sell them to insurance brokers to follow up on.

“ I could see these other agents for Farmers in Florida that had just taken off. But I was really struggling; I wasn't getting the results that I thought that I should be. And so I really started doing a lot of work, a lot of investigative work and started talking to some people... And I realized that they were buying internet leads, instead of doing a lot of community stuff. So it was just a complete shift and something completely different from what I'd always known.”

These leads are expensive, but when managed correctly have an exponential impact. David looked for a tool that did three key things. It must integrate all communication methods (email, phone, and text messaging) into a single platform. It must also allow him to scale his marketing efforts efficiently. Finally, it must enable his team to respond immediately to new leads.

VanillaSoft was the platform that allowed him to do all three – and the results are spectacular.

ONE SCREEN – ALL COMMUNICATION METHODS

David started the evaluation process for a tool to manage his internet leads by asking his peers. Some reported they used Salesforce. He wasn't impressed with their “do-it-yourself” approach to customization.

Other agencies used [AgencyMVP](#),

“ But again, it only deals with a part of what I needed. And just for simplicity's sake, I thought it would be easier.. for my sales producers to just learn one software instead of a bunch of them.”

Then David discovered VanillaSoft. VanillaSoft was the only platform that allowed him to schedule and conduct all lead engagement activity within a single tool. That meant less to learn and better productivity during the day. David has also learned that the best thing for his sellers is for them to have two screens - one with VanillaSoft, and the other with their proprietary quoting tool.

“ VanillaSoft has everything there. If you want to call someone, email someone, or text someone, all of your leads' data is right there on that screen. You don't have to keep dropping windows and closing windows and opening programs. It's all right there!”



**If you want to
CALL SOMEONE,
EMAIL SOMEONE,
OR TEXT SOMEONE,
ALL OF YOUR LEADS' DATA IS
RIGHT THERE ON THAT SCREEN.**



Engage More. Talk More. Sell More.

vanillasoft.com
sales@vanillasoft.com

N.A. + 1 866 763 8826
E.U. + 44 203 586 747

HOW PEOPLE BUY INSURANCE HAS CHANGED

When David started selling insurance, people bought insurance differently than they do today. What generated sales in 2010 won't produce the same results in 2020. Sites like EverQuote, that collect information from people in the market and sell it to agencies, have disrupted the process.

“ People think, ‘Hey, I need to do something about my insurance,’ so they go on Google and search ‘auto insurance quote,’ and they fill out just a little bit of information. The moment they hit that button at the end of the form, they become a lead, and then within five seconds, my producer has that lead on their desk. As long as we’re calling within 60 seconds, you’re getting that person while they’re still sitting there thinking, ‘Hey, I need to take care of my insurance.’ If you wait longer than 60 seconds, they’ve moved on to something else in their life.”

VanillaSoft ensures near-instant engagement with these high-value leads and even takes the actions a step further by automating immediate email and text responses.

“ Anytime we call an internet lead, and they don’t answer the phone, the producer hits one button. Instantly a text goes out to them, and an email goes out to them.”

It may seem easy to think that a 5 minute or even a 24 hour response time won't affect the conversion rate for these leads. But as David has learned, “Who in their life wants to be contacted out of the blue by someone saying, “Hey, I can probably save you some money on insurance.” However, if you can get them in that moment when they're interested, sitting down and thinking about it, your likelihood of getting that conversation going is very, very good.”

Not only is VanillaSoft the best way for David and his agency to get to leads fast,
IT WAS ALSO DEPLOYED QUICKLY.

“VanillaSoft assigned someone from the very beginning who was going to help me. The way they approached it was, ‘Okay if you want to try this, we’re going to get you set up by the end of the day. You’re going to log in, and you’re going to have some time to start working and looking at it. Then tomorrow we’re going to have this person who will be there to help you. She will have training sessions and anything you want to do. She’ll show you how to do it and train you on how to do it.’”



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SCALABILITY MEANS SUSTAINABLE GROWTH

Deploying VanillaSoft as a critical part of a larger modernization strategy has resulted in increased sales. In fact, sales have increased so much that David has been able to hire three more sellers. Even more remarkable is that he deployed VanillaSoft in March of 2020 – so he was growing and hiring despite a pandemic and a recession.

“ I have the freedom to hire. I'm 'motivatedly' hiring now. So if I just happened to run into somebody, and I think to myself, 'Wow, this person would be a terrific producer!' Having VanillaSoft and having the internet leads, I get the freedom to hire that person on the spot.”

David was also pleasantly surprised by another aspect of VanillaSoft's deployment.

The integration of VanillaSoft with his lead providers means **HIS MARKETING BUDGET CAN INCREASE OR DECREASE AT WILL.**

“ The real power of this for me is the scalability. When you come from traditional marketing, being able to see an immediate return on your spend is very, very difficult. I have ultimate control over exactly how many leads are coming in on a day to day basis. This gives me incredible scalability and control over my marketing costs.”

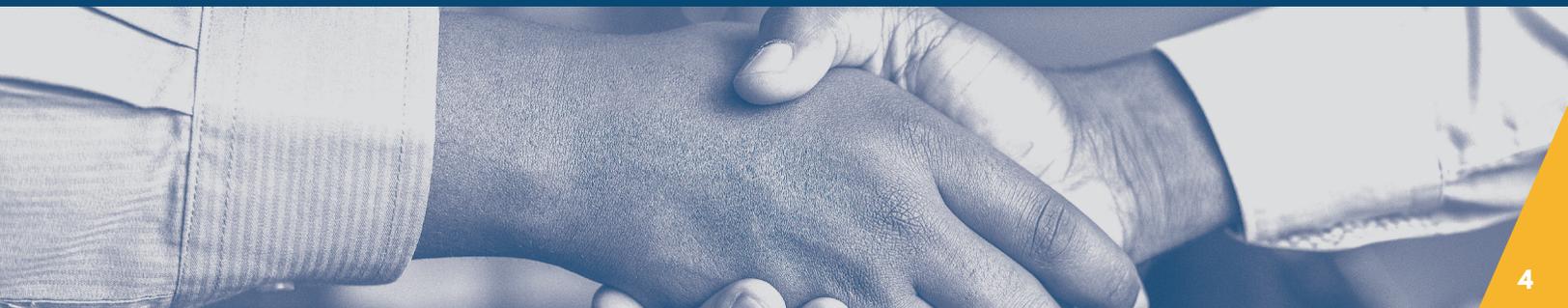
RESULTS WITH VANILLASOFT

Fender Insurance Company started 2019 using legacy tactics for lead generation and follow up. Using that method, they were able to generate between \$18,000 and \$20,000 each month in sales.

Since deploying VanillaSoft as a part of their modernization campaign in March 2020, they have seen a 500% increase in monthly sales. Their first full month on VanillaSoft, their revenue increased 100% to \$40,000. Their second month, it rose again to \$66,000. Their third month, two additional sellers started, and they are on pace to break \$100,000.

David and his team continue to adapt their methods to ensure they're building the most efficient machine for lead follow up possible. While remarkable, their results are attainable by any insurance agency with time, the right tools, and a commitment to modern sales techniques.

Wondering how to make this happen for you? [Come talk to us!](#)



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