

FROM GOOD TO GREAT

# HOW VANILLASOFT ENSURED STUDENT CALLERS ARE ALWAYS CONNECTING WITH THE BEST AVAILABLE PROSPECTS

VanillaSoft enables King's College London to realize maximum call campaign success by way of enhanced reporting, dynamic data prioritization , and an intuitive UI for callers - all backed up with exceptional customer support.

## EXECUTIVE SUMMARY

King's College London is a public institution ranked in the top 10 universities in Europe and 33rd in the world (according to QS World Rankings 2020). The student call center is a significant source of philanthropic gifts to the university, connecting the thriving student body with a highly active alumni network. VanillaSoft has helped King's to strengthen and leverage these connections by way of a fully customizable caller interface, enhanced potential for dynamic data segmentation and prioritization , as well as real-time reporting and data analysis.



TOP 10  
UNIVERSITY  
IN EUROPE



CREATIVE AND  
INNOVATIVE ALUMNI  
OUTREACH



DYNAMIC DATA  
SEGMENTATION AND  
PRIORITISATION



BEST-IN-CLASS  
TECHNICAL SUPPORT



## CHALLENGES

Founded in 1829 and well known for its long history of academic excellence, King's College London boasts an extremely impressive list of notable alumni. With such a large and active alumni community to engage with, tools that maximize caller productivity whilst offering maximum insight with respect to performance are crucial to optimizing campaign results.

Consequently, King's was looking for innovative ways to increase alumni engagement and, in particular, creative means with which to build positive connections with their non-donors. They place a huge emphasis on matching their students with alumni with whom they are most likely to have an authentic connection, so as to make attempts to build rapport feel as natural as possible. They also conduct a wide variety of calling campaigns, from standard phonathon outreach to planned giving, international alumni engagement, and affinity-based campaigns. Students aim to raise as much money as possible for the university, whilst also capturing high-quality constituent information and sharing details of recent university news and upcoming events with alumni.

Additionally, King's was aiming to make their donation collection process paperless to ensure complete compliance with GDPR requirements.

## HOW VANILLASOFT HELPED

VanillaSoft's donor engagement software allowed King's to turbocharge their campaign efforts whilst also making it as simple and easy as possible for their callers to have high quality, natura-sounding conversations with their alumni.

Ria Latif, Direct Marketing Coordinator, said,

“ [VanillaSoft] is quick, clear, and easy to use and so provides a good solid foundation for staff during campaigns.”

Since deploying, they have seen that VanillaSoft's dynamic segmentation, custom analytics and adaptable, easy to use UI has given their student fundraisers, as well as their campaigns, the best possible chance of success. The King's team also reported having easy access to outstanding technical and strategic support from the VanillaSoft team.

“ [VanillaSoft] helps to better allocate data to callers to make sure they are put in the best position in being able to build rapport and have a positive call.

RIA LATIF  
DIRECT MARKETING COORDINATOR  
KING'S COLLEGE LONDON



Since deploying, they have seen that  
**“EVERYTHING IS ON A SINGLE SCREEN FOR THE CALLER!  
FROM TAKING PAYMENTS TO NAVIGATING THE SCRIPT, TO BEING ABLE TO MAKE NOTES  
AND HAVE A CLEAR PROFILE OF WHO THEY ARE CALLING.”**



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## HOW VANILLASOFT HELPED (CONT.)

### Improved Conversion through the Use of Segmentation

One of the primary strengths of the campaigns at King's is the students' ability to draw upon shared experiences in order to quickly and easily connect and build rapport with alumni. "VanillaSoft segmentation plays a key role in ensuring the right student is automatically matched with the right alumni, based on what the two individuals may have in common." King's is able to secure these pairings by utilizing custom filters for each student. This ensures staff and caller resources are deployed as effectively as possible to maximize the likelihood of a positive outcome on the call.

“VanillaSoft allows staff to have a head start in their calls, effectively building rapport and making use of the conversations they have.”

Pairing callers with alumni who have a similar background and shared interests

### HAS ALLOWED KING'S COLLEGE LONDON TO MAXIMIZE RESULTS

by guaranteeing that their callers are always calling the alumni with whom they have the most in common.

“When the segments that have been given the highest level of importance have been exhausted, the [system automatically] transitions onto the next priority level. As and when a record of a higher priority or importance becomes available, this contact will automatically be fed to the callers. Smart and efficient for when you are having a busy calling shift!”

### Improved Analytics through Enhanced Reporting

Reporting and analysis are key in all call centers, and at King's, "VanillaSoft allows us to analyze contact positive and contact negative results in real-time. This means that if a particular region of calling or a specific faculty isn't doing so well, you can immediately analyze the results and switch up the calls if you need to!"

The combination of real-time reporting and filters

### HAS ACCELERATED THE SPEED WITH WHICH THE CALLERS CAN REPLICATE WINNING STRATEGIES.

It has also allowed the team to seamlessly pivot and adjust its approach if one strategy is proving to be less successful than another.

“Reporting is also an important tool that allows you to feedback performance and progress against targets, so they have a good understanding of the overall picture of how the campaign is doing.”

VanillaSoft segmentation plays a key role in

**ENSURING THE RIGHT STUDENT IS AUTOMATICALLY MATCHED WITH THE RIGHT ALUMNI**

**BASED ON WHAT THE TWO INDIVIDUALS MAY HAVE IN COMMON**



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## Intuitive UI Keeps Callers Happy

King's administrators are not the only ones who love using VanillaSoft. Callers have reported that "[VanillaSoft] is easy to use. All aspects (including constituent information, scripts, payment gateway, and comments box) are on one screen, and it is easy to navigate between the different areas. This is helpful for staff, particularly when they have to deal with complex queries on the phone."

## Paperless Process

VanillaSoft has also been crucial in helping their student call center go paperless as part of the university's broader data privacy and security strategy, particularly in response to the GDPR. Going paperless when collecting credit card information and payments was a key part of ensuring compliance.

“The promise of a paperless 'clean-room' environment aids callers when making an ask for a donation, and helps to reassure alumni if they have security concerns.”

## Exceptional Support at Every Step

VanillaSoft sets the standard for ensuring customer success. Deployment is a breeze, and friendly and prompt responses allow clients to use all features to their full potential.

“VanillaSoft staff have always been on hand for us when we have needed help on shift and are able to quickly access your account to respond to any questions you may have.”

Call centers can only operate at peak volume for a couple of hours per day, which means that support services need to be quick, responsive, and efficient. “VanillaSoft [staff] are friendly, prompt, and always helpful when we have had an enquiry. Easy working relationships with individuals working at VanillaSoft means that all things software-related run smoothly during busy campaign times.”



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## RESULTS

King's College London already had a strong calling program. However, partnering with VanillaSoft helped raise the bar and move the program from strong to stellar. Phonathon manager, Ria Latif, went so far as to say that she would gladly recommend VanillaSoft to her colleagues at other educational institutions based on the impact it had on segmentation and reporting, as well as the quality of technical support.

Student callers now have all the information they need in one place, from custom scripting to paperless payment processing. Management has access to nuanced reporting, which allows them to build successful campaigns that can be adjusted in real-time. Segmentation has led to quicker and deeper connections between callers and alumni. And, most of all, the entire team has felt the impact of attentive and responsive support.



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