INSURANCE

RECRUIT & RETAIN SALES AGENTS WITH VANILLASOFT

Running an insurance agency can be as highly profitable as it is demanding. Being in charge, not only are you accountable for generating revenue, but you have the added pressure of managing office logistics, keeping track of finances, and hiring and managing a team of sales agents.

Wouldn't it be nice if you could reduce agent turnover?

Finding and recruiting new agents is really just another type of sales process. By giving your agent recruitment team access to VanillaSoft, they can realize the same benefits as the insurance agents they have recruited.

> With VanillaSoft we saw a big increase in agent retention. Because it's such a simple system to use, new agents find success faster and stay longer.

SETH DORNE DIVISIONAL SALES LEADER, USHEALTH ADVISORS

USHEALTH ADVISORS
A UnitedHealthcare Company

VANILLASOFT CAN HELP YOU ANSWER "YES" TO THESE CRITICAL QUESTIONS

ARE YOUR NEW AGENTS RETAINING ALL OF THEIR TRAINING?

VanillaSoft constantly reinforces your sales process for new agents, while providing you with clear visibility into their effort and performance.

ARE YOUR AGENTS ABLE TO REACT TO SPECIFIC SALES CIRCUMSTANCES?

Dynamic scripts allow sales agents to roll with the punches, presenting answers to objections as they happen.

DO ALL AGENTS FOLLOW THE SALES PROCESS?

For new agents, VanillaSoft keeps sales agents on track with your preferred sales cadence.

ARE YOU RETAINING YOUR SALES AGENTS?

Nothing is as attractive as success. By helping new agents close deals quickly, they are more likely to stick with a career in insurance sales.

Reach More Agent Prospects

The same lead management tool that agents use to engage with new clients can also be used to recruit new agents. Contact the best prospects first, across multiple channels (text, email, phone), and ensure follow-up.

Simplify Agent Training

VanillaSoft's quick-to-learn and easy-to-use interface dramatically reduces the need for sales process training and gets new agents selling faster.

Fast-track Agent Success

Dynamic sales outreach guidance, including call scripts, email/SMS templates, and cadence enforcement allows even the most inexperienced rep to sell like a pro.

Strengthen Agent Retention

By giving agents the tools they need to be successful, VanillaSoft helps them close their first deals sooner, giving them the confidence to develop a long-lasting career as an insurance agent.

Capterra

66 I like that VanillaSoft is so easy to use that even the most technically challenged people can use it.

CASEY N., INSURANCE AGENT, CAPTERRA

G²

66 When you have any other CRM, prospecting for your business can be overwhelming and scare you when you see a whole list of names or businesses to call. VanillaSoft puts just one contact in front of you so you can't worry about what's next.

DEAN C., INSURANCE AGENT, G2

VANILLASOFT EMPOWERS
PRIORITY-BASED LEAD MANAGEMENT

VanillaSoft lead management simplifies the entire insurance sales process, from lead prioritization, to establishing outreach cadences, and all the way through to tracking results. With VanillaSoft, sales agents of all skill levels can focus on the most important tasks - building relationships and issuing more policies. And with detailed insights into sales activity, VanillaSoft provides management with the necessary information they need to measure lead ROI and make strategic business decisions.

With VanillaSoft,

- ✓ Be the first to reach a prospect
- ✓ Engage via multiple channels
- ✓ Work every lead
- ✓ Convert more leads
- ✓ Track agent activity
- ✓ Import leads from any source
- ✓ Automate repetitive tasks
- ✓ Work the best leads first
- ✓ Focus your sales team
- ✓ Seamlessly manage appointments
- ✓ Measure referrals

SEE HOW VANILLASOFT CAN IMPROVE YOUR AGENT RECRUITMENT EFFORTS.

REQUEST A DEMO TODAY.