



INSURANCE

THE POWER OF 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.



G2 REVIEWS

I can confidently say that we were able to grow our business by an additional 30% thanks to VanillaSoft.

SETH DORNE DIVISIONAL SALES LEADER, USHEALTH ADVISORS



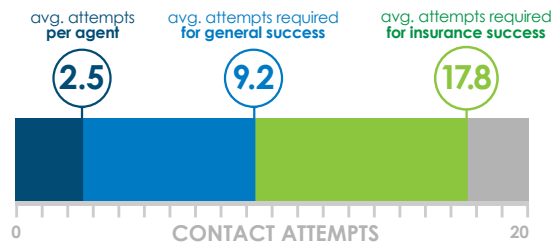
DESIGNED FOR STARTING RELATIONSHIPS

For many organizations, Customer Relationship Management systems are the primary database of customer interactions. But CRM systems were not intended for rapid and efficient lead qualification by sales agents.

CRMs are List-Based

CRM systems simply lack the tools necessary to provide sales agents with a structure for success.

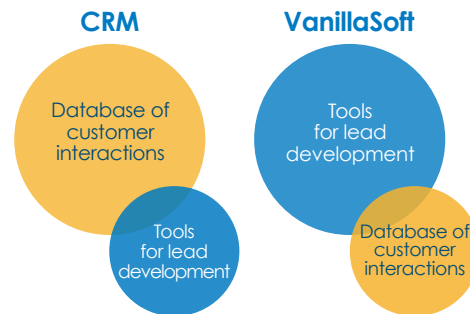
By providing agents with only a CRM list-based pool of leads, sales agents are free to choose the leads they deem valuable, while ignoring the rest. Sales agents are also left to establish their own follow-up cadence, usually absent of established best-practices. Leads are too valuable to be wasted because not enough attempts are made—or are not made at all!



VanillaSoft is Priority-Based

With VanillaSoft, leads are thoroughly worked, maximizing lead ROI.

VanillaSoft is the only lead management solution that uses priority-based lead distribution. Presenting only one lead at a time – the next best possible lead – sales agents remain focused on prospecting. By simplifying the lead management process and removing time consuming tasks, VanillaSoft helps sales agents make 2 to 3 times more contact attempts per day.



G2 REVIEWS

Lead management made easy

Before using a CRM for our business, we would print our leads and call stacks of paper leads, leaving our notes on the lead card. VanillaSoft eliminates the need for paper that and has increase our conversion by 20%.

BRIAN B., PRESIDENT AT HORIZON LIFE INSURANCE SERVICES, INC.



Get More Productive. Get More Nimble. Get More Sales.



Be the First to Reach a Prospect

VanillaSoft serves the 'freshest' leads immediately, ensuring your agents reach out to prospects within minutes.



Automate Repetitive Tasks

Managing lead lists, scheduling call-backs, sending follow-up emails/texts, and CRM updates are just some of the everyday tasks that VanillaSoft automates – allowing agents to spend more time selling.



Engage Via Multiple Channels

VanillaSoft gives agents the ability to communicate via email, video, text (SMS), and phone, allowing them to connect using the channel their prospects prefer and will be most likely respond to.



Work the Best Leads First

All leads are prioritized as they arrive in real-time, to ensure agents immediately contact the next best prospect in accordance with your segmentation strategy or ideal customer profile (ICP).



Work Every Lead

While fresh, inbound leads take priority, the VanillaSoft cadence guarantees no lead goes untouched. Every lead can be kept active, with low probability leads assigned to automated drip nurture campaigns.



Focus Your Sales Team

Eliminate agent cherry picking and time wasted flipping between applications. VanillaSoft provides all the information and tools agents need while management-established filters serve just one lead at a time.



Convert More Leads

Lead prioritization, in conjunction with task and follow-up cadence automation, guarantees that each lead is worked to its full potential.



Seamlessly Manage Appointments

Agents can easily schedule call-backs and appointments for themselves or anyone else, adding details directly to Outlook or Google calendars.



Track Agent Activity

Detailed activity reports provide insight into agent performance metrics and reveal the effectiveness of leads by source, enabling management to make informed strategic business decisions.



Measure Referrals

Never lose sight of your referred leads' source. Measure the cost of each lead or referral, as well as the total value (ROI) of the lead over time.



Import Leads from Any Source

No matter where you source your leads (Facebook, web forms, chat bots, lead list services, etc.) they can all be imported into VanillaSoft where they can realize their maximum value.



Recruit & Retain Agents

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

