

DATASHEET

VANILLASOFT REPORTING & ANALYTICS

The best strategic decisions are informed by data. VanillaSoft's powerful reporting engine provides sales and fundraising leaders with detailed insights into campaigns and caller performance, allowing for quick adjustments that capture maximum ROI from each and every prospect.

VanillaSoft's standard reports provide visibility into key lead and caller performance metrics, while the intuitive drag-and-drop report designer allows managers to develop customized reports and dashboards. Performance monitoring reveals critical details, such as the best calling times, channels, optimal number of calling attempts, and messaging performance. When combined with contact source performance reports, your team can easily modify VanillaSoft's Next Best Record engine to accurately identify priority records and deliver them to callers at the right time, with the right message.

Beyond lead performance, managers also receive detailed insights into the activity and performance of their team. This allows them to quickly identify callers who are struggling to perform, activity volume, and even identify if they are manipulating the system to simulate activity.

VanillaSoft reports can be customized and designed to meet your exact specifications—with charts, tables, and graphics to match your branding requirements—and can be easily distributed to internal and external stakeholders in Excel, PDF, CSV, or RTF format.

HIGHLIGHTS

- Identify high-value lead profiles
- Optimize engagement practices
- Track employee performance and activity
- Monitor for accidental compliance violations

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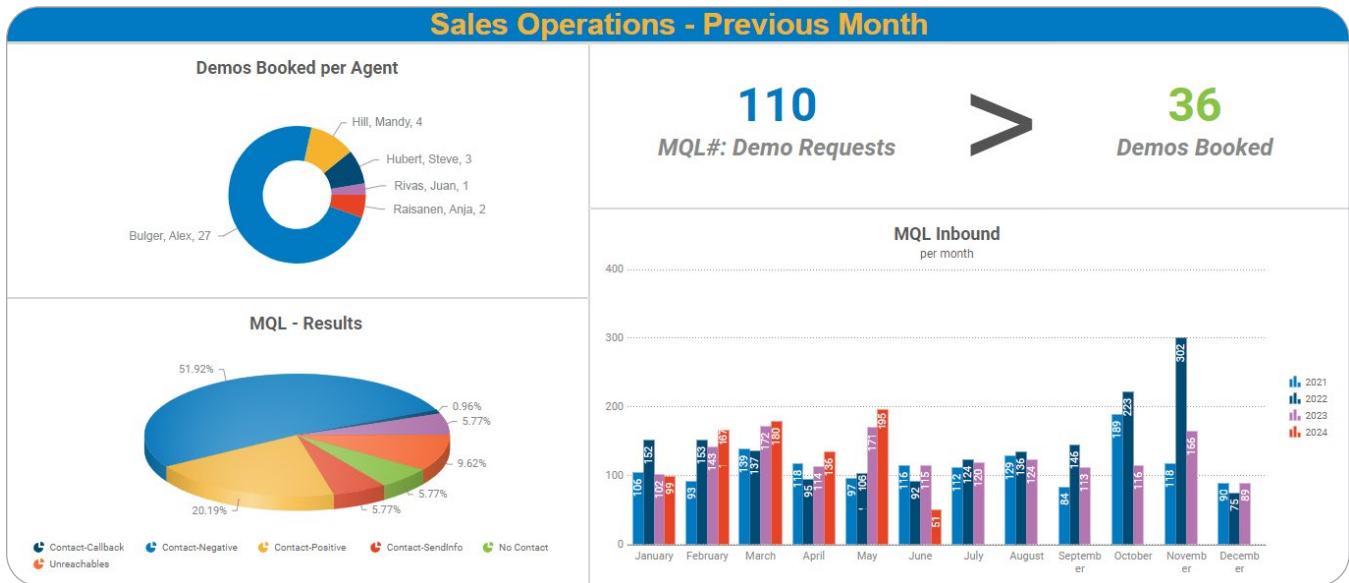
SPECIFICATIONS

- Included with all licenses
- Starter templates
- Schedule export via email or FTP
- Export to Excel, PDF, CSV, or RTF
- Embedded tutorials



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FEATURE	BENEFITS
Multiple report types	Leverage express, advanced, cross-tab, and chained report builders to create virtually any type of report: summary, trend, scorecard, KPI, exception, drill-down, comparative, compliance, and others.
Reporting dashboard	Combine existing reports into one dashboard, providing visualizations and insights into key data at a glance. Add images, text, interactive filters, and even external websites for a comprehensive snapshot.
Custom formulas	Customize formulas to extract key insights. Combine functions, parameters, data fields, cell references, and number, date, or text values.
Default report templates	Quickly set up foundational reports using VanillaSoft report templates. Monitor caller activity, lead source results and status, and the speed at which your callers engage priority leads.
Intuitive report designer	Create reports easily using the full suite of familiar and easy-to-understand design tools. Drag and drop data, customize colors, content, chart types, labels, and even insert images consistent with your brand guidelines.
Scheduled reports & exporting	Run a scheduled report at the time and recurrence of your choice, from minutes to months. Send reports via email or FTP, in either Excel or PDF formats - which can be password protected - or as a CSV or RTF file.
Compliance monitoring	Defend your compliance reputation with reporting that proactively identifies potential user or configuration issues before they escalate.



SAMPLE REPORT DASHBOARD



Engage More. Talk More. Sell More.

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