PRODUCT SHEET
VANILLASOFT AND CRM

For many organizations, CRM systems are the primary database of customer interactions — used by marketing, sales, professional services, and support. But CRM systems were not intended for rapid and efficient lead qualification by sales agents. VanillaSoft lead management was purpose-built to empower sales agents to find the best leads and turn them into customers.

CRM

Database of customer interactions

Tools for lead development

VanillaSoft

Tools for lead development

Database of customer interactions
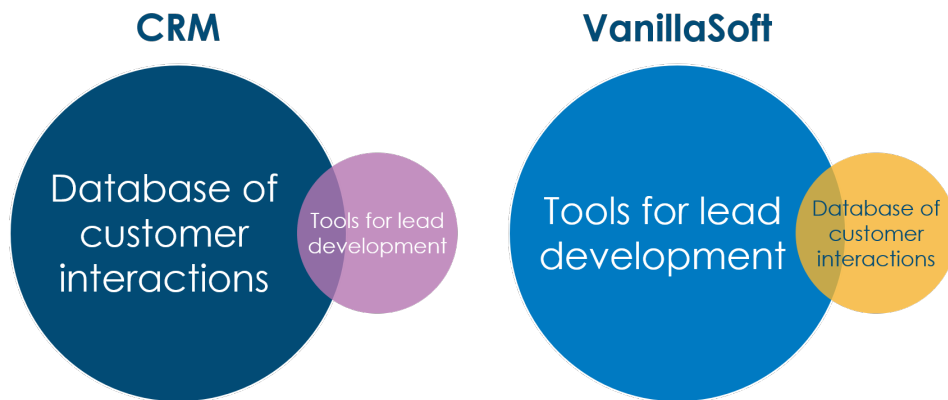
CRM was designed for managing relationships.
VanillaSoft lead management was designed for starting relationships.

- David Hood, CEO VanillaSoft

CRMs are List-Based

By providing agents with only a CRM list-based pool of leads, management loses the ability to focus sales agents on the absolute next best possible lead. Instead, 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 — oftentimes completely absent of established best-practices. CRM systems simply lack the tools necessary to provide sales agents with a structure for success.

FOLLOW UP	**CHERRY PICKING**	**SPEED-TO-LEAD**	**PRODUCTIVITY**	**PERSISTENCY**	**CADENCE**
Long and ever-growing list of leads to follow up	User prioritization of lead follow-up	Lack of rapid new lead follow-up	Approximately 35% less productive	Lack of continuous lead follow-up as leads fall off the page	Lack of regular outreach

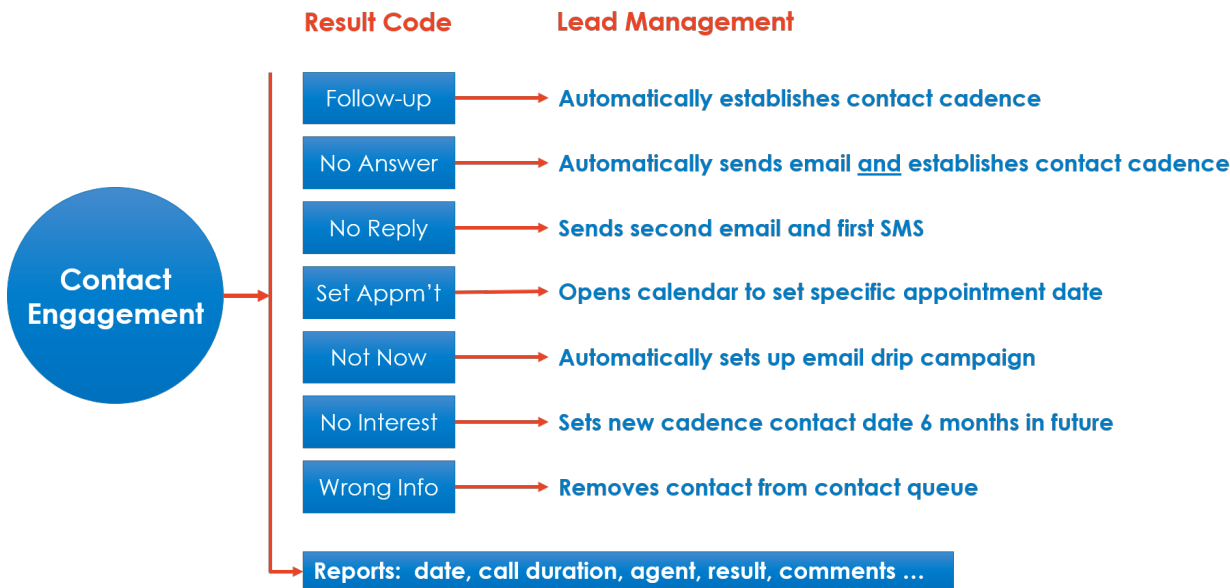| Average contact attempts made per agent:	Average required attempts for success (general):	*Average required attempts for success (insurance):*
2-3	**9.2**	*17.8*

VanillaSoft is Priority-Based

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. With an easy to use interface, dynamic call scripts, and proven templates for email and SMS, VanillaSoft dramatically decreases new agent training requirements while increasing win rates – encouraging agents to stick with it.

Engage 2 to 3 Times More Leads

When an agent has completed a contact attempt, they click a "Result Code" button. Result Codes are a customizable list of pre-defined actions, which when triggered:

1. record what happened during the contact engagement
2. immediately and automatically send follow-up actions (send email, send SMS)
3. automatically establish the appropriate follow-up cadence to ensure follow-up discipline, and
4. update the cadence, depending on the engagement result.

Result Code **Lead Management**

Contact Engagement

Result Code	Lead Management
Follow-up	Automatically establishes contact cadence
No Answer	Automatically sends email and establishes contact cadence
No Reply	Sends second email and first SMS
Set Appm't	Opens calendar to set specific appointment date
Not Now	Automatically sets up email drip campaign
No Interest	Sets new cadence contact date 6 months in future
Wrong Info	Removes contact from contact queue

Reports: date, call duration, agent, result, comments …

VanillaSoft cadences are omni-channel by design (phone, email, SMS) to increase the likelihood of reaching the prospect via their preferred method of communication.

Superior Lead Management

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. And with VanillaSoft, leads are thoroughly worked, maximizing lead ROI.

Whether used stand-alone or in partnership with a CRM solution, VanillaSoft will sharpen the focus and effectiveness of your sales agents.