



INSURANCE

ELIMINATE BUSYWORK AND SPEND MORE TIME SELLING

When it takes a staggering 17 contact attempts* for an insurance agent to reach a prospect, they can't afford to waste time on mundane tasks that can be automated.

Insurance sales team productivity is hindered by a myriad of time-consuming tasks, including managing call lists and researching prospects. VanillaSoft simplifies the entire outbound sales process, from lead prioritization, to establishing outreach cadences, and through to tracking results.

With VanillaSoft, your sales agents can focus on building relationships and issuing more policies.

*Sales Engagement: Lessons Learned From Studying 130,000,000 Sales Interactions, Telfer School of Management.

VANILLASOFT AUTOMATES:

- ✓ LEAD PRIORITIZATION
- ✓ LEAD DISTRIBUTION
- ✓ PHONE DIALING
- ✓ VOICEMAILS
- ✓ CONVERSATION SCRIPTS
- ✓ EMAILS
- ✓ EMAIL FOLLOW-UPS
- ✓ TEXT MESSAGES (SMS)
- ✓ DRIP CAMPAIGNS FOR EMAIL
- ✓ DATA COLLECTION
- ✓ CRM UPDATES
- ✓ MIXED CADENCES (email, text, calls)
- ✓ CONTACT TIME ZONE DETECTION
- ✓ CALLING PERIOD MANAGEMENT
- ✓ APPOINTMENT/CALENDAR INVITES
- ✓ APPOINTMENT REMINDERS
- ✓ EMBEDDING OF THIRD-PARTY TOOLS/RESOURCES
- ✓ DOCUMENT MAIL-MERGE
- ✓ CALENDAR SYNC & SHARING

“ WE LOVE VANILLASOFT. IT HAS HELPED INCREASE OUR PRODUCTIVITY IMMEASURABLY. THANK YOU FOR YOUR GREAT SERVICE AND FOR YOUR GREAT PRODUCT.

LEADING U.S. NATIONAL HEALTH INSURANCE DISTRIBUTOR



Engage **More**. Talk **More**. Sell **More**.

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AUTOMATE REPETITIVE TASKS

Leaving voicemails, drafting emails, and composing text message (SMS) are time consuming tasks that impede agents from chasing new leads. Customizable message templates and voicemail recordings can be set up within VanillaSoft for each stage of the sales process, enabling insurance agents to complete these tasks with just the click of a button.

CALL THE BEST LEADS

Reclaim the time wasted haphazardly picking over lead lists, trying to determine which are the most likely to buy insurance. VanillaSoft's Intellective Routing continuously evaluates and re-prioritizes all leads based on the filtering criteria you deem to be the most important, including: website activity (buyer intent signals), industry, company size, job title, revenue, prospect location, or any other characteristics. Agents are always presented with the next best available lead so they can spend their time selling to the leads most likely to convert.

RESPOND INSTANTLY TO INBOUND LEADS

Today's consumers have more choices and demand faster service, so any delay in responding to a customer request could cost you the deal. VanillaSoft's Intellective Routing lead prioritization ensures that fresh inbound leads (captured from web forms, lead aggregators, or other buying intent signals) are routed to the next available sales agent within seconds, ensuring immediate sales engagement while the lead is hot.

ENSURE CONTACT FOLLOW-UP

Studies show it takes an average of 17 touches to reach an insurance prospect, so establishing a determined follow-up cadence is vital to success. Customer outreach progressions are completely customizable in VanillaSoft and can combine a mix of phone call follow-ups, text messages, and email drip campaigns. Using the right mix of media and content, at the right times and for the right duration, helps your agents maximize each lead's potential to become a customer.

BUILD RELATIONSHIPS

Building a relationship of trust begins with the first conversation. VanillaSoft's logical branching conversation scripts keep your team on message and permit real-time qualifying. Customizable information tabs can provide immediate competitive intelligence and objection handling assistance for agents as they nurture the deal.

CAPTURE CRUCIAL INTELLIGENCE

Your insurance agents are talking to prospects about their goals and the challenges they face, but where does all that information go? VanillaSoft makes it easy for agents to collect information as they are talking to their prospects and customers. The resulting conversation branch choices, agent completed survey fields, and call result codes can be analyzed to help enhance messaging, product offerings, and objection handling.

REPORT AND ANALYZE ACTIVITY

Sales leaders require insight into sales team activity and results in order to improve sales performance and provide accurate forecasts. VanillaSoft provides real-time insight into key performance metrics, including calls made, call duration, meetings booked, time to close, pipeline, and many more. Managers can also analyze email and call script performance down to each decision point. VanillaSoft's granular reporting capabilities provide sales managers detailed insight into what – and who – is working.

FOCUS YOUR SALES TEAM

New insurance products, new regulations, and changing demographics are some of the factors that can influence sales strategies and prospective customers. With a simple adjustment to VanillaSoft's lead routing priorities and conversation scripts, sales managers can immediately re-focus their entire sales organization to a specific region, age, income, or any other data point.

