

## Case Study

### SalesRoads

### Increased Sales by 20% and Transformed Operations

#### OVERVIEW

SalesRoads is a leading B2B appointment-setting and lead-generation provider for mid-market and enterprise-level organizations. It creates comprehensive campaigns for clients to increase revenue and reduce their overall cost per sale.



#### BUSINESS CHALLENGES

SalesRoads wanted a simple, yet powerful CRM software to streamline its operations and increase sales. The company was looking for a solution that focused heavily on cold calling. After conducting research, SalesRoads discovered that most CRM softwares are not designed from the inside out to handle heavy cold calling. They are built to hold information, not to help a salesperson to be more productive, and include complicated, unnecessary features that reduce key calling metrics, such as dials, contacts, appointments, and sales per hour.

An important consideration in the company's decision was using a cloud-based software that agents could access remotely throughout the U.S. Other challenges included the ability to make impromptu campaign changes and train efficiently, which required several days, and was costly and time consuming. This created a burden, especially when hiring several new employees at one time.

In addition, SalesRoads needed a more effective way to report and analyze conversions and sales, as well as understand the best demographics for campaigns. It wanted to gain insight into the best leads and to adjust the call queue accordingly.

*“VanillaSoft’s queue-based routing not only boosted calls per hour, but increased sales.”*

David Kreiger, President  
SalesRoads

*“We chose VanillaSoft because it’s extremely powerful, and so simple to use. It maximized the efficiency of our call centers.”*

David Kreiger, President  
SalesRoads

#### VANILLASOFT’S IMPACT

SalesRoads increased productivity and calls per hour by 35% with VanillaSoft’s preview dialing and custom, rules-based routing. With only a few clicks, management can now specify the relevant demographics and route the next-best lead to the sales rep, relieving them of searching for the next lead to call. The lead simply appears, ready to call, after the result is entered from the previous call. This makes the sales team more productive because there is no more dead time between calls. The reps are now able to increase

#### SPOTLIGHT ON SalesRoads

SalesRoads uses a customized approach to optimize calling structures for clients. The company was recently named on the Inc. 5000 list of fastest growing privately held companies.

**Industry:**  
Telemarketing/Business Services

**Headquarters:** Coral Springs, Florida

**Founded:** 2007

**Acquired Vanillasoft:** 2008

**Website:** salesroads.com

**Specializing in:**

- Appointment setting
- Lead generation
- Webinars
- Sales outsourcing

## VANILLASOFT'S IMPACT

(Cont.)

conversion ratios due to the easy viewability of lead information from the main contact screen: demographics, call history, email history, scripting, etc. Everything needed to personalize conversations, reference communications, or add to an individual's value proposition is now accessible without having to open window after window.

Easy-to-use email templates also assist SalesRoads in making sales. Reps can automatically send customized, predesigned and approved emails with a few clicks. This enables more talk time, and less time deciding on the right words to email the prospect. In addition, with VanillaSoft's e-Gen, a contact can be routed back to the rep immediately, or in an interval after the email has been opened. In fact, all emails sent will show if they were opened, bounced, or unopened. With this information reps are more prepared to make follow up calls, because they know the interest level.

In addition, VanillaSoft saved SalesRoads money on training costs for new sales reps. This was especially important when SalesRoads seamlessly transitioned reps from a newly acquired call center that used another CRM system. They were trained in just a few hours instead of several days, and found VanillaSoft much easier to use to keep track of contacts, for email, and to search for prospect records.

From training to call routing, VanillaSoft's dynamic cloud-based CRM solution gives SalesRoads the right tools to increase efficiency, maximize profitability, and connect with sales reps in remote locations like never before.



### VanillaSoft features used most often:

- Appointment Setting
- Call Activity Dashboard
- Preview Dialing
- Queue-based Routing
- Custom Field Edit and Update
- Web Reporting
- Scripting
- Email Templates and e-Gen

## ABOUT VANILLASOFT

VanillaSoft is the industry's leading smart software for sales by phone. Its intuitive and easy-to-use queue-based features for inside sales takes the best of CRM, lead management and telemarketing applications to create the most productive phone sales environment available today.

VanillaSoft's core philosophy and development process is centered around one concept: the power of simplicity. It is through this principle that VanillaSoft offers a queue-based platform that allows our customers to see increased productivity, higher contact rates, deeper list penetration, greater management control over the sales process, better sales accountability tools, and a faster speed to lead like no other.

**Learn more about how your organization can benefit from VanillaSoft:**

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