

industry case study

MARKETING SOLUTIONS



CASE STUDY

THE NEED

An Integrated Marketing Solutions Provider needed a system to centralize processes that were managed in Access and Excel and create efficiencies in the reporting process.

THE SOLUTION

VanillaSoft's cloud-based software solution secure data centralization and robust web reporting reduced administrative efforts and boosted productivity.

THE CLIENT

ACTIVE # OF USERS



>100 Users

MAIN OFFICE




Columbia, Maryland

REGIONS SERVED



North America

PAIN POINT



No Centralized System for Processes



OUTBOUND CALLING FOCUS



REMOTE & IN-HOUSE AGENTS

THE SOLUTION

CUSTOMER RATINGS

EASE OF USE & ONBOARDING



SUPPORT & CUSTOMER SERVICE



CLIENT-REQUIRED FEATURES

- ✓ Ease of Use/ Administration
- ✓ Lead Importing/Exporting, Routing & Distribution
- ✓ Appointment Setting
- ✓ Custom Fields & Data Capture
- ✓ Real-Time Dashboards & Web Reporting

SOLUTION BEFORE VANILLASOFT

✗ EXCEL & MS ACCESS

OTHER SOLUTION CONSIDERED

✗ SALESFORCE.COM

CUSTOMER QUOTE

"The ability to customize some parts of the system to match our needs has been a game changer. Reporting that took us 30 minutes or more to compile with our spreadsheets and database systems now take less than two minutes to generate with VanillaSoft. David Hood and his team at VanillaSoft have systematically gone above and beyond for us."

START YOUR FREE TRIAL TODAY

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