

NEXT-GEN ENGAGEMENT:

How VanillaSoft empowers a sales enhancement outsourcing firm to work smarter, faster – and from anywhere

VanillaSoft enables GenSales’ seasoned SDRs to open doors for the company’s customers and book appointments, which in turn empowers those customers’ own sales teams to do what they do best – meet with prospects, nurture client relationships, and close deals.

EXECUTIVE SUMMARY

GenSales specializes in “decision-maker-directed sales activity” to help B2B clients increase revenue quickly and cost-effectively. With a focus on lead generation and appointment setting services, GenSales works with organizations of all sizes and in a wide variety of industries. In 2019, GenSales was voted #1 on a list of the “10 best telemarketing companies to watch” by [Insights Success magazine](#).

The company has been using VanillaSoft since 2015 for its outbound calls. VanillaSoft is the perfect solution for their team because it is a web-based platform that users can access from anywhere with internet connectivity. GenSales has a distributed workforce across the U.S. so having the ability to work from anywhere is a significant benefit for their sales team. Not to mention, VanillaSoft is user-friendly, flexible, and built to produce results. What’s more, a dedicated support team is on call to troubleshoot, train, and help tackle every challenge.

“**VanillaSoft has been extremely helpful for us in a lot of different ways – organizing, reporting,**”

comments Senior Account Manager Heather Connors.

“We’ve gotten a lot sharper.”



HOW VANILLASOFT MAKES IT HAPPEN



Demand Generation Strategies

Leads are like coffee: Warm is acceptable, but hot is optimal. VanillaSoft enables GenSales to keep their clients toasty with a consistent stream of pre-qualified leads.



Appointment Setting

AEs should be nurturing long-term relationships built on rapport and trust. GenSales' team of highly trained, experienced callers can execute scheduling tasks with the utmost professionalism.



Database Intelligence

It's not just a buzzword at GenSales. And VanillaSoft's solution isn't just a lead tracker or auto-dialer. Its powerful platform features dozens of integrations, call recording, email and SMS marketing capabilities, and more.

REMARKABLE VALUE, FORMIDABLE CHALLENGES

As one of the leading B2B lead-generation and appointment-setting firms in the U.S., GenSales has an incredibly diverse client base and a mandate to provide them with responsive, tech-savvy, and overall impeccable service.

Solving the cost + time equation

For its clients, GenSales can provide things that often have a prohibitive cost when they're done in-house, like a well-trained, experienced team and the ability to pivot between strategies or modify scripts during a campaign quickly.

Plus, GenSales can pre-qualify leads or set appointments without taxing its account executives' time, energy, and relationships.

Competing in a high-stakes, high-speed world

At his previous company, VP of Sales Peter Kandell explains his team was using "Excel-based tools" to communicate with clients.

"We didn't have a true platform to work with," he says.

Prior to deploying VanillaSoft, GenSales relied on spreadsheets to manage its outbound sales efforts. But as the company grew, expectations grew to match, and those tools became insufficient.

Senior Account Manager Heather Connors cut her teeth as a caller at a previous company where they didn't have a sales engagement



tool for callers. She explains, “I worked off of spreadsheets, and we had accounting software, but we didn’t have any kind of database or anything like that. They built some spreadsheets that we had to sell off of and call. I had to make all of my own prospecting lists from Google and copying and pasting things I thought were OK.”

Managing a remote workforce

GenSales employs SDRs all over the U.S. – quite literally. “They work from home from New York to Hawaii,” Heather explains.

Their longtime employee in the Aloha State “gets up at 2:30 in the morning to call his East Coast client, every day for 11 years,” she adds. “He’s one of our best callers, very dedicated to what he’s doing.”

While location (as long as it’s within the States) is unrestricted, experience is an absolute must. In fact, the average age of GenSales’ callers is about 40.

“They’ve been managers of teams and of call centers. Some of them have owned their own businesses,” says Heather.

But that wealth of experience can mean a steep learning curve for new technology, so an intuitive interface is the better option.

It’s also critical to provide remote teams with tools that facilitate communication between multiple time zones, easy transitions between campaigns, and transparency between callers and managers.

Leaders need to watch... and learn

Managing a remote workforce isn’t just about supervising. It’s essential for GenSales’ outbound sales team leaders to gather information on callers’ progress and use it to better understand what works and what doesn’t.

The company is dedicated to delivering results for its clients, which requires managers to identify things to tweak and enable their teams to do it on the fly.

Talent and Workforce Manager Jennifer Line notes that some callers work on three, four, five different projects even in one day. That’s another reason why GenSales needs a software solution that can stand up to those kinds of dynamic circumstances.

Insights require integrations

What is the most valuable service GenSales delivers to its customers? Insights.

Whether they’re building a database of leads or refining a pre-existing one, vetting prospects, or scheduling demos with them, detailed reports are a must. The company prizes “database intelligence” and needs a sales engagement platform (SEP) that’s built to fulfill that mission.



OUTBOUND... AND UPWARD: HOW VANILLASOFT HELPED

Over the past five years, VanillaSoft has become a way of life at GenSales.

“It’s everything. We train on it. We call on it. We analyze from it – soup to nuts,” says Peter, a 30-year veteran of sales and business development who joined the company shortly after their VanillaSoft integration.

Heather agrees. Not only does she and her colleagues use VanillaSoft daily, but they also use it “minute-ly, second-ly,” she quips.

Easy to use, simple to learn

When Jennifer Line arrived at GenSales, she had never used VanillaSoft. But she found it to be accessible and intuitive.

“ I thought it was very user-friendly,” she says.

“I really like the layout, especially from a caller perspective.”

That’s particularly important when training callers who are unfamiliar with the platform. Those who have experience with VanillaSoft “absolutely love it,” she says. But newbies soon join the fan club as well. Due to the nature of telemarketing work – and by being independent contractors – many GenSales callers have worked from CRMs (or the common spreadsheet).

Either way, “people say they like VanillaSoft a lot better,” Jennifer notes.

And once they “get the hang of it,” she says, “it’s repetition. Once they’ve made their first

50 dials, they feel really comfortable with how things work in VanillaSoft.”

For managers and other sales leaders, implementing new campaigns is smooth sailing too. Heather says it takes anywhere between 5 to 10 business days – “but that’s with our process of script creation, pulling lists, training callers, and building the system.”

If she has the opportunity to focus without interruptions (which she usually doesn’t), she “could probably build a campaign in about 15 minutes.”

What’s in it for callers?

Every account manager begins somewhere. For Heather, that meant making 150-plus cold calls a day with only spreadsheets to guide her and prospecting lists that she created “from Google – just copying and pasting things I thought were okay.”

“ Coming from that world, VanillaSoft is amazing for a caller. The difference is night and day.”

She particularly appreciates the user interface: “the flow of moving from left to right, the result codes,” she adds. “It’s so nice having everything right there in front of you.”

Most importantly, the way that VanillaSoft organizes and tracks prospect data and arranges multiple touches is seamless.

“ It makes you so much more efficient,” Heather says.



What's in it for managers?

If the dashboard is a boon for callers, it's a lifesaver for managers.

Jennifer, whose background is primarily in real-time workforce management for large corporations, appreciates how responsive VanillaSoft can be for smaller but no less nimble teams.

One of the first things she did when she began using VanillaSoft was to create her own dashboard.

“ I can customize it to display the things I want to see, whether they're the dials callers make, the appointments they're setting, or the call duration. I love being able to see their login time versus their call duration versus their talk time.”

That way, she can compare that data to clients' KPIs in an elegant, visual way, filtered by campaign or by caller.

“From a management standpoint, my boss didn't know what I was doing in a day,” Heather reflects on her own early call-center jobs. “He didn't know how many dials I was doing or who I was calling.”

Without a way to monitor them, “he was just like, your numbers are good, or they're not,” she adds. “But he didn't know how we were getting there.”

But now that she's a manager herself, she tracks every step of her callers' process.

“ We can find people who do things to skirt the system – like if they've only made five dials in an hour. Maybe when you were working on spreadsheets, you could do that, but with VanillaSoft, you should be doing 20 to 25 dials an hour.”



Integrations make for a seamless workflow

Heather appreciates VanillaSoft's easy integration with a number of calendar applications.

“It makes our process so much more seamless,”

she says.

“It reduces reschedules and our clients being unhappy, which is wonderful, you know?”

And those all-important client KPIs are tracked, quantified, and analyzed through integrations with dozens of cutting-edge and industry-standard software solutions.

GenSales also connects the VanillaSoft platform with Salesforce, which is a critical tool for many sales teams.

Though GenSales uses VanillaSoft on an operational basis solely for outbound calls, **the platform can provide insights used internally as well.**

Recently, GenSales has been running its own sales campaigns to sign more roofing and HVAC clients. But to do so, they needed insight, so they gathered metrics with VanillaSoft to deliver the right content, such as case studies.

Based on recorded conversations, scripts, and hours of dialing, GenSales' in-house sales team can approach a roofing company and confidently tell them that they can predict costs, configurations, and results.

Matchless support

“I'm sure if you mentioned my name to the support team, they'd probably laugh because I am often literally in contact with someone daily – just to learn things on my own or to help a caller,”

says Jennifer.

“Not only the product but the customer team, is just top-notch.”

She has worked with scores of software solutions throughout her career – but has “never experienced the kind of customer service we get from VanillaSoft,” she adds.

Peter is similarly impressed with the dedicated customer team.

Peter said,

“They're never impatient. I feel like they're always available no matter how often you call. I feel like I can go to them with anything.”

Heather has even set up support calls with her clients.

“I know it's probably the client's user error, but the VanillaSoft support team is good enough to get on the phone with me and my client, access their computer, get that thing connected, and get us running. To me, that's amazing. You guys are determined to help us make it work.”



VanillaSoft's support includes a searchable self-service client portal with extensive documentation, frequently asked questions, common issues, and accompanying fixes.

"I try to utilize that before I reach out to the support team," says Jennifer. But if the issue persists, she can directly chat with a support representative on the same site.

Heather found the support portal particularly helpful when she was stuck on integrations with Salesforce.

"For the most part, I can find stuff," she adds. "When I can't, I always know I can call somebody."

“VanillaSoft’s “out of this world customer service” includes “making sure I understand – not only for myself from an admin perspective, but from a caller perspective as well.”

– Jennifer Line, Talent and Workforce Manager

DIALED IN. FIRED UP. READY FOR WHATEVER'S NEXT.

Is GenSales' success a result of VanillaSoft?

"No. It's a result of our *calling teams'* success," says Peter. (You've got to love a boss who gives credit to his team.) "But VanillaSoft is such an indispensable part of day-to-day operations at the company, it's hard to imagine working without it."

"It's pretty amazing as far as efficiency, time-saving, and effectiveness," Heather says. And in a business that promises to deliver precisely that to those they serve, VanillaSoft was a good call to make.

“Our clients are amazed at our ability to send information – what we can send and what we can do, thanks to the capabilities of VanillaSoft.”

– Heather Connors, Senior Account Manager

