



## Upping their game from Xencall and VICIdial, Insurance Call Center Scales by More Than 1000%

Top Healthcare Options owner Tiffanie Gonzalez, 10-year health insurance veteran, is leaping forward to grow her thriving business. She shares a story of the impact of flexible, automated, real time analytics.



Top Healthcare  
Options



**RESULTS**

**After  
Switching to  
Convoso**

- **ACCELERATED GROWTH**  
from 5 to 100 agents in less than one year
- **QUICK INSIGHT**  
into lead vendor performance
- **LOWER COST**  
per lead and more value from lists
- **IMPROVED EFFICIENCY**  
for call center managers
- **REDUCED RATE**  
of abandoned calls
- **NEW LAUNCH**  
of in-house lead generation



**I always say that you're only as good as your team. And I feel like Convoso is, in essence, a critical part of our team. You need a good dialer, you need good lead vendors. Everything together - the team, the dialer, the lead vendors - makes everything good.**

*—Tiffanie Gonzalez, Owner,  
Top Healthcare Options*



## Our Customer

Top Healthcare Options is a rapidly-growing health insurance agency focused on expanding its ability to help consumers obtain affordable health insurance. To accomplish this, Top Healthcare Options needed a solution to efficiently manage leads and scale their cloud-based call center. By making the switch to Convoso, the company gained the right set of tools and metrics to continuously optimize the dialer and improve productivity.

“With Convoso, we’ve been able to optimize all of our calls. That’s helped tremendously in order to scale our business. Using all the tools that Convoso provides, we’re able to optimize and track productivity.”

—Tiffanie Gonzalez, Owner,  
Top Healthcare Options

### Their Challenges

- Managing productivity
- Maintaining uptime
- High call abandonment rates
- Time wasted on tedious manual reporting
- Difficulty tracking productivity of lead sources
- High expenses buying data

### Our Solution

- Dedicated support manager
- Real-time automated reporting & historical analytics
- Power Dialer optimization
- Caller ID management
- Omnichannel features
- Quick disposition tools to reduce agent wait time

### Results

- Rapid growth
- Increased agents from 5 to 100 in less than a year
- Improved manager efficiency
- Streamlined and improved reporting capabilities
- Minimized call abandonment
- Enabled launch of lead generation



“

When we started with Convoso we had eight people. In less than one year, we're up to 100 people in our organization. And Convoso had a huge part to play.



**1000%**  
**increase**  
**in agents**  
**in one year**



I'm a report fanatic. My favorite part of Convoso is all of the reports that it allows you to run.

Our main issue was really just managing productivity. I was super excited to launch Convoso so we could pull up different reports that give us the ability to see how certain lists and agents are performing. It's the dialer, but it's also the leads. Sometimes some sources are doing better on a specific day, in a specific time.

Convoso really makes it easy for us to figure those things out.

## The Impact of Intelligent Real Time Analytics

Top Healthcare Options was able to automate and streamline reporting analytics once they switched to Convoso. They no longer need to manually copy and paste data into spreadsheets to create reports.

Now real-time metrics automatically populate easy-to-read reports on customized dashboards that the call center managers use throughout the day.



# Smart & Easy Reports to Drive Efficiency

## XENCALL



XenCall was not user-friendly at all.

When I had to run reports on XenCall, I would pull up different things and combine them in an Excel sheet. It was like a homemade version of what Convoso reports can do.

## CONVOSO



With Convoso, it does it all for you. You just have to pick the metrics you want and it makes the report, puts it all together.

## VICIDIAL



We used Vicidial for a few months...

The reports are very hard on the eyes – everything's very tiny and all you see is colors, because everything's mashed together.

## CONVOSO



With Convoso, everything is nice and big and bold. It's especially good for my managers who spend the day looking at the agent monitor screen.

When you glance at it, you can automatically see where things are. Everything they need to know is right there on the agent monitor, which is what I love for our managers.





# Saving Money by Knowing Where to Spend Money

## Analytics by Lead and Lead Source

Top Healthcare Options was able to spend less money after switching to Convoso's dialer. With the lead management capabilities of the new power dialer they can create different lists and queues and are able to track every call by lead source.

A critical analytics report made a huge difference to their contact center operations: Convoso's List Conversion Report. This business intelligence report shows the profit and loss of lists. Now Tiffanie has insight into real time profitability metrics that inform decisions about dialing strategies for better contact rates. She can compare multiple lists to see which are performing best [most profitably], and make smart choices about which lists to turn on and off.



With VICIdial I ended up spending a lot of money since I couldn't figure out which vendors the calls were coming from, and I couldn't optimize. I just kept buying from sources that weren't doing any good.

Now with Convoso, I happily give my money to the vendor that's making me money, not the vendors that are not making me money.

Since reports can also be run by agent, she can use the data to track agent productivity.

Now that she knows her true CPA [cost per acquisition], Tiffanie spends their daily budgeted amount of money for leads, but spends it on the right vendors. With a higher conversion rate, she's getting more revenue for her lead costs, driving lead efficiency for the company.



## Saving Time with Flexible, Automated Reports

Real-time tracking of critical data has allowed Top Healthcare Options to drive manager efficiency by giving them insight into the performances of both lead sources and agents. With that they can make informed, strategic decisions.

In contrast, when they used VICIdial it was hard to track numbers because they had to gather data manually. And some metrics weren't even available.

**“Convoso really makes it easy for us to figure things out. We're able to easily pull up reports to see how lists and agents are performing.**

**With VICIdial we would have to do it manually. We had all these different sources of lead vendors and it was hard to keep track of the numbers.**



With VICI we knew we had a lot of abandoned calls, but we couldn't look up the actual number. So our options were really limited.

But with Convoso, we don't have many abandoned calls, because we have all the data we need to make decisions throughout the day.

## Abandoning Abandoned Calls

Abandoned calls were a problem for Top Healthcare Options prior to making the switch to Convoso.

Now, their managers have all the information they need on a single screen to minimize call abandonment, including the number of leads in the hopper, the number of viable leads, and the abandoned call percentage.





## Tools to Improve Lead Management

Managing leads efficiently is one of the most important ways for an outbound call center to increase productivity and profitability.

Top Healthcare Options was struggling with insufficient tools and a lack of insight into lead and list performance prior to using Convoso's contact center software. Now they have the tools and metrics to improve lead management, and they can make strategic decisions about leads and leads sources in real time throughout each dialing day.

**“We use different lists and every list has a different source for our calls. With Convoso we’ve been able to optimize all of our calls. We can see where we’re having better luck on what day at what time so that we can rank those up and slow some other ones down.**

**It’s helped us out tremendously in order to scale our business. We use all of those tools that Convoso provides to continuously optimize and track productivity.**



## The Power of Flexibility

Top Healthcare Options chose Convoso's power dialer as a better fit for their operations than the predictive dialer. It helps them adjust the dial rate according to the flow of business. If it's slow they adjust the dial level so they don't end up with abandoned calls in the queue. That way they're not losing money because no agents are available.

**“We use the power dial mode. We feel as though we're paying a lot of money for these calls and we don't want to abandon calls in the queue as we might with the predictive dialing.”**



## Greater Productivity with a Dream Team

As the owner of a growing health insurance company, Tiffanie works closely with her dedicated Convoso Customer Success Manager to optimize their power dialer configuration. The Convoso support team is a highly available resource that helps her get the most from the Convoso solution.



My CSM, Caitlyn, is really on top of it. She's my go to. But if she can't answer my call, she'll text me right away. So then I'll call support. And I get an amazing group of guys and they're super nice. Everyone is amazing, everyone I've ever talked to at Convoso.



You're only as good as your team, and I feel like Convoso is, in essence, a critical part of our team and our success.

It's not just customer service for Convoso. It's more like a relationship. I talk to Caitlyn all the time and it's like everyone is really on our side and it's more personal – not just an answering machine or giving me some generic answer.



# A Healthy Forecast to Grow with Convoso

## Expanding Capabilities with Lead Generation

Top Healthcare Options' success with the Convoso solution has spurred remarkable growth. Owner Tiffanie Gonzalez is taking this expansion as an opportunity to launch a new parallel business to support health insurance sales by generating leads in-house.

With this new division, Top Healthcare Options can transfer qualified leads to one of the company's licensed health insurance agents. By generating and qualifying their own leads, they'll save time and money as an independent turnkey operation.

**“We’re growing extremely rapidly. We were able to scale and Convoso was a huge reason why.”**

**“I have other offices that I’m opening up and I can have all agents still on my dialer, and I can monitor them on the Agent Monitor.. I can see how my campaigns are doing without having to switch over to another dialer.”**



## More Calls with Quick Dispositions

**Simplifying transfers with Quick Disposition means shorter wrap up time, greater accuracy**

Transferring calls required multiple steps prior to using Convoso's Quick Disposition feature. Agents wasted time dispositioning calls and racked up a lot of inaccuracies in the process.

Now Top Healthcare Options agents have as little as one click to disposition a call. Their wrap up time is faster, and agents can handle more calls. And, with the streamlined process, call center managers can rely on improved accuracy of disposition data, and knowing they haven't lost a valuable lead due to an incorrect transfer.

**“We're changing everyone to Quick Disposition. I fell in love with it because now I don't have to worry about agents transferring. They just click it. When you make it easy for them, then you know it's going to get done and you know it's going to the right place. They can just do it without even thinking about it.”**

# Get dramatic results for YOUR call center.

## ABOUT CONVOSO

[Request a Demo](#)

Convoso is the leading innovator of cloud-based omnichannel contact center software. Our call center customers report dramatic increases in contact rates of 30% and more, giving them higher conversions and significantly improved ROI.

The Convoso system works best with 10 or more seats, and scales efficiently to over 1000 seats to meet enterprise level requirements.

See for yourself with a live demo how Convoso can help to boost the productivity of your outbound contact center.

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