

Switch from VICIdial Yields Across the Board Improvement for Insurance Lead Gen Company

You Had Me at
“Dialer Comparison Trial”

NEXTGEN LEADS



RESULTS

After
Switching to
Convoso



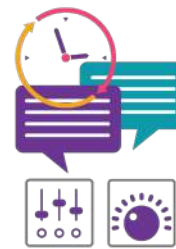
TRANSFER RATE

15% Increase



TIME SAVED

for Agents
and Managers



CONTACT RATE

Improved
due to reliable system,
enhanced redial/recycle
logic, smart features to
hone strategy



Our Customer

[NextGen Leads](#) [NGL] generates high-quality leads for auto insurance, health insurance, and Medicare. The company offers real-time leads in volume for US locations, suitable for individual producers to carrier level lead buyers.



Convoso has a superior product...Convoso adapts to your business instead of your business adapting to it.

— Melvin Merritt, Call Center Director, NextGen Leads

Their Challenges

- Dropped calls
- System down frequently
- Complicated navigation
- Poor Agent UX
- Hard to train supervisors and agents on VICIdial
- Reports time consuming
- Difficult getting support

GOALS

- Increase call volume
- Improve process of live transfers
- Reduce dropped calls
- Improve agent UX

Our Solution

- Trial to compare Convoso in both power & predictive dial modes
- Advanced Power Dialer
- Dedicated CSMs to help optimize configuration
- Automate & streamline workflows and transfers
- Increase connection and contact rates with optimized dialer
- IVR for inbound routing
- Adjust dialing cadence by .5 increments to find the sweet spot for running their campaigns

Results

- Improved user experience for agents and managers
- 15% Increase in transfer rate
- Live transfers simplified
- Dialing efficiency from better control and finesse of dial cadence
- Fewer dropped calls
- Reliable system means less down time and more productivity
- Responsive IVR increases inbound performance
- Simplified training
- Save manager time with reports in one place



Dialers on Trial

NextGen Leads was using VICdial to run their insurance call center when they decided to take Convoso for a test drive. For a side-by-side comparison they ran their leads half on VICdial and half on Convoso.

The overall better dialer was clear. Among many improvements, the trial revealed that Convoso dialed more and it was simple to use. With the Convoso Dialer:

- Loading up the leads was simplified.
- Live transfers were streamlined.
- Navigating features was smoother.
- Convoso support was readily available.



“Convoso blew VICdial away.”

—Melvin Merritt, Call Center Director,
NextGen Leads

The Biggest Wins

While Convoso performed well in the trial period, the biggest wins were to be had after making the switch to the Convoso dialer, felt in the progressive and persistent improvement of the overall operation.

NextGen Leads manages a high volume of calls for its insurance lead generation business: agents receive inbound calls, make outbound calls, and transfer calls. So, every bit of lost time adds up.



Making up for lost time

Many ways that NextGen Leads was losing time with VICIdial include:

- The system could be down for hours at a time
- A lot of issues with dropped calls
- Agents wasting time navigating around the software for features
- Agents using complicated processes for transferring calls
- Managers needing to pull in KPIs from different reports in different places
- Managers spending too much time training agents and supervisors
- Managers spending a lot of time trying to get ahold of support

The efficiency, user interface, and intelligent features of Convoso helped NextGen Leads turn the clock back and save time for agents and managers. Time put to better use making their entire operation run more efficiently and smoothly.





Transfer Relief

As a lead generation company, transfers are a critical part of a successful business transaction - that is the sale. But, the transfer process was complicated with VICIdial.

As NextGen Leads tried out Convoso's software, it was a relief to see how easy it was to accomplish this essential task.

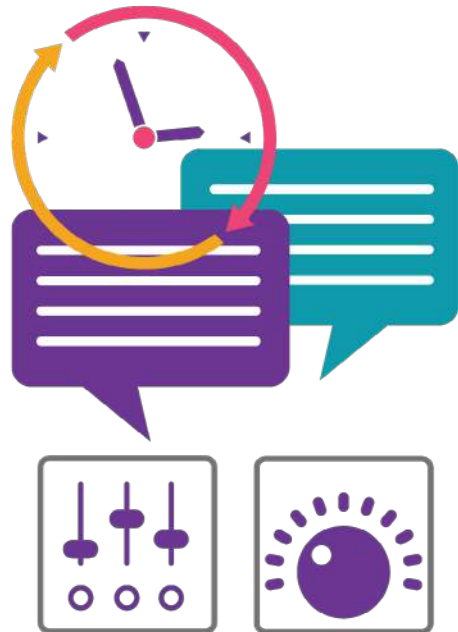
When we spoke with NextGen Leads, their transfer rate was up about 15%, and they expected it to improve. The simplicity of live transfers with Convoso helped streamline the process, saving time and improving prospect experience.





Logically Speaking, Convoso Makes the Difference

One of the biggest improvements from their former software is the dial logic to customize their dialing cadence. The capability to adjust the dialing cadence [number of rings for time out] by .5 increments was new to NextGen Leads, and it helped them find the sweet spot for running their campaigns.



Having a dial cadence based on dial count is super important. It's the best way to get the contact rate up.

—George Mueller, VP of Sales,
NextGen Leads

Split the Difference

The managers at NextGen Leads employ the strategy of split testing [A/B testing] everything, something they could not do with VICIdial. They run two simultaneous campaigns with 5000-6000 leads per list using different dial logics and then pick the winner.



More Toys in the Toolbox

Convoso offers more features to support smart dialing strategies and options to make adjustments in real time to keep the team dialing more efficiently.

Convoso's advanced power dialer ended up being the best fit for NextGen Leads over our predictive, progressive, and preview dialing modes.

With the frustration of long system down times and continuous issues with dropped calls in the past, NextGen Leads is operating smoothly. We all count time and money, but maybe we should also be tracking the benefit of reduced stress levels!

Agent Experience

VICIdial was a challenge for the user experience of NextGen Leads agents. This issue was a driving reason for trying and switching to Convoso.

With the intuitive, simplified interface of the Convoso platform, their agent UX improved significantly.

Whenever agent time and tasks can be streamlined and automated, call centers see not only more



The way that we can play with the dial rate makes a big difference. We don't have to increase it in whole increments—we can increase it in fractional increments. That allows us to figure out the sweet spot.

— Melvin Merritt

conversation time for agents, but improved morale—and that leads to higher productivity, greater retention, and therefore, less time and money put into recruiting and training. Win-win.



IVR to the Rescue

Using IVR [Interactive Voice Response] has enabled NextGen Leads to route Inbound calls more effectively. With IVR, inbound prospects can engage with the system via voice or keypad. These leads are pre-filtered and then routed to the right agent, based on their responses. This inevitably saves agent time when customers can immediately talk to them and know they're in a conversation with the right agent.

Training

Bottom line: It's much easier to train agents and supervisors with the Convoso software system because the UI is intuitive and streamlined. This kind of facility means training takes less manager time. "Training supervisors with VICIdial," noted VP of Sales George Mueller, "they would break it."

Manager Efficiency

With their previous dialer, VICIdial, managers had to pull all the information together. Now, with all of the reports in one place, they save about 30 minutes



every morning. And the Convoso reports are better. Managers use the Agent Monitor to help track KPIs and manage agent productivity.



That's 5-Star Customer Support

NextGen Lead's Melvin Merritt reports that it was hard to get ahold of VICIdial support. Imagine his surprise when he found out how easy it is to reach Convoso's Customer Success Team. He says we have very responsive customer care.

Melvin likes having the ability to live chat with Convoso support. He says most of their issues get handled that way and are fixed in a matter of minutes. The CSMs call and email to summarize. We're glad to hear him say, "The follow-up is amazing."

Every Convoso client is teamed with a Customer Success Manager who is dedicated to helping them optimize their dialer and succeed in their business goals.



Convoso has a superior product. First off, from the software's ease of use, including navigation, learning, and even the tutorial videos for management. Second, the customer friendliness - anything you need, they are there to walk you through it, apply it for you if you need, and give you an explanation on how to do it yourself. Third, the platform runs smoothly, and offers lots of features. Convoso adapts to your business instead of your business adapting to it.

*— Melvin Merritt, Call Center Director,
NextGen Leads*



Quick & Easy Transition to Remote

By the middle of March 2020, businesses across the nation were scrambling to adjust to stay-home directives. Location-based call centers were suddenly trying to adapt to remote operations with at-home agents. About half of Convoso's customers already ran virtual call centers. But many others needed our help. NextGen Leads was among the call centers that transitioned their team to work from home.

Melvin, the call center's director, told us they experienced a smooth transition, and that they were able to maintain good call volume. We asked if he had advice for companies wanting to switch to remote. He said that based on their experience, with tools in place, it should be an easy transition for a call center to go virtual. "They need a reliable system for employees,



as well as management and training. They need their people to be self reliant. Then it should run the same as when operating in the office."

To learn more about managing a productive virtual call center, check out the resources on our [WFH page](#).

Get dramatic results for YOUR virtual 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 virtual contact center.

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