

Vacation Innovations streamlines lead assignment



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- Diana Maali, Director of Product Management at Vacation Innovations



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In this case study, we explore how **Vacation Innovations**, a leading provider of travel-related products and services, leveraged Plauti's assignment capabilities to streamline their lead assignment process. Founded in 1999 and based in Orlando, Florida, Vacation Innovations initially struggled with OmniChannel routing and cumbersome manual assignments, which hindered their efficiency. By implementing Plauti's assignment solution, they automated their lead distribution, integrated seamlessly with High Velocity Sales, and significantly improved their operations.

Like many Salesforce customers they first tried using OmniChannel routing. However OmniChannel's service-oriented approach didn't quite work for them as it relied too much upon the agents' login status. Diana said: "OmniChannel did not work for all agents as it required them to be available and it was hard to track how many records each person was getting and if an agent did not login or forgot to login, records were not being distributed".

Manual assignment of leads happens in different ways across Salesforce orgs, and Diana explained how they were doing it at Vacation Innovations; "We had teams working off of list views and having their management reassign records as they came into different queues. This was cumbersome". Also, they wanted agents to work different campaigns which meant they needed a way to evenly distribute a certain number of records across all agents for any given campaign.

Within two weeks of discovering Plauti as a possible solution, Diana had it set up to automate routing and assignment for their Lead, Opportunity and Contact objects.

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Diana Maali

Director of Product Management at Vacation Innovations

Extending Plauti solution to integrate with High Velocity Sales

Working with our customers is often about solving their problems as efficiently as possible. At Vacation Innovations they use High Velocity Sales and immediately after assignment they need to add the lead to a specific Sales Cadence. Diana's developers were having a long running challenge of being able to get their high number of leads quickly added to Sales Cadences whilst staying within the strict Salesforce governor limits.

“My developers were using Apex triggers to assign a record to a Sales Cadence after it had been assigned via Plauti’s assignment capabilities. Ed suggested making a change in Plauti’s assignment solution where we can assign a Sales Cadence from the match group. This allows us to disable any jobs that are running so we can free up system resources and be able to get leads added to HVS more quickly. This is a game changer for us!”



Diana Maali

Director of Product Management at Vacation Innovations

Quick setup and "amazing" customer support

From time to time everybody needs a bit of assistance or help to think something through. When Diana or anyone else at Vacation Innovations needs a helping hand the team at Plauti are on the case - always looking for the most efficient solution to the next challenge. Often Plauti will have the tool-set to do it out-of-the-box and other times we integrate with Flow to get more sophisticated things done. Whatever the solution, we help get our customers there as fast as possible.

“Customer Support has been pretty amazing compared to other companies out there. We had assistance in our initial setup as well as throughout the entirety of us using Plauti’s assignment solution. They have been super helpful and is always extremely timely in their replies. I also enjoy brainstorming on ways we can better utilize the product to help us become more efficient. I appreciate them being willing to make updates to the system periodically to introduce new features that are always helpful!”

Plauti features used by Vacation Innovations

- Even Distribution of Leads
- Capacity-Based Assignment Capping Out of Office
- Geographical and Attribute Segmentation
- Add To Sales Cadence Working Hours

Plauti is "absolutely" recommended by Vacation Innovations

Diana has confidence that she is working with a robust tool that is backed up by meticulous customer service with deep expertise in the Salesforce platform. When asked if she would recommend Plauti Assign, Diana said:

"Absolutely, I cannot say enough about how much we rely on Plauti to help make various departments work more efficiently. Knowing which match group something was assigned to also helps us report off of that information to know which match groups were the most successful. I am happy with the product and most importantly the customer service experience. It is comforting to know that at any point we can reach out with questions so we can continue to enhance our processes."



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