

Growth & Performance Optimization Guide

What Changes When Your Business Runs on EnrollHere?

88%

Stronger Compliance

Up from 40%
Year-over-year

35%

Lower Cost Per Sale

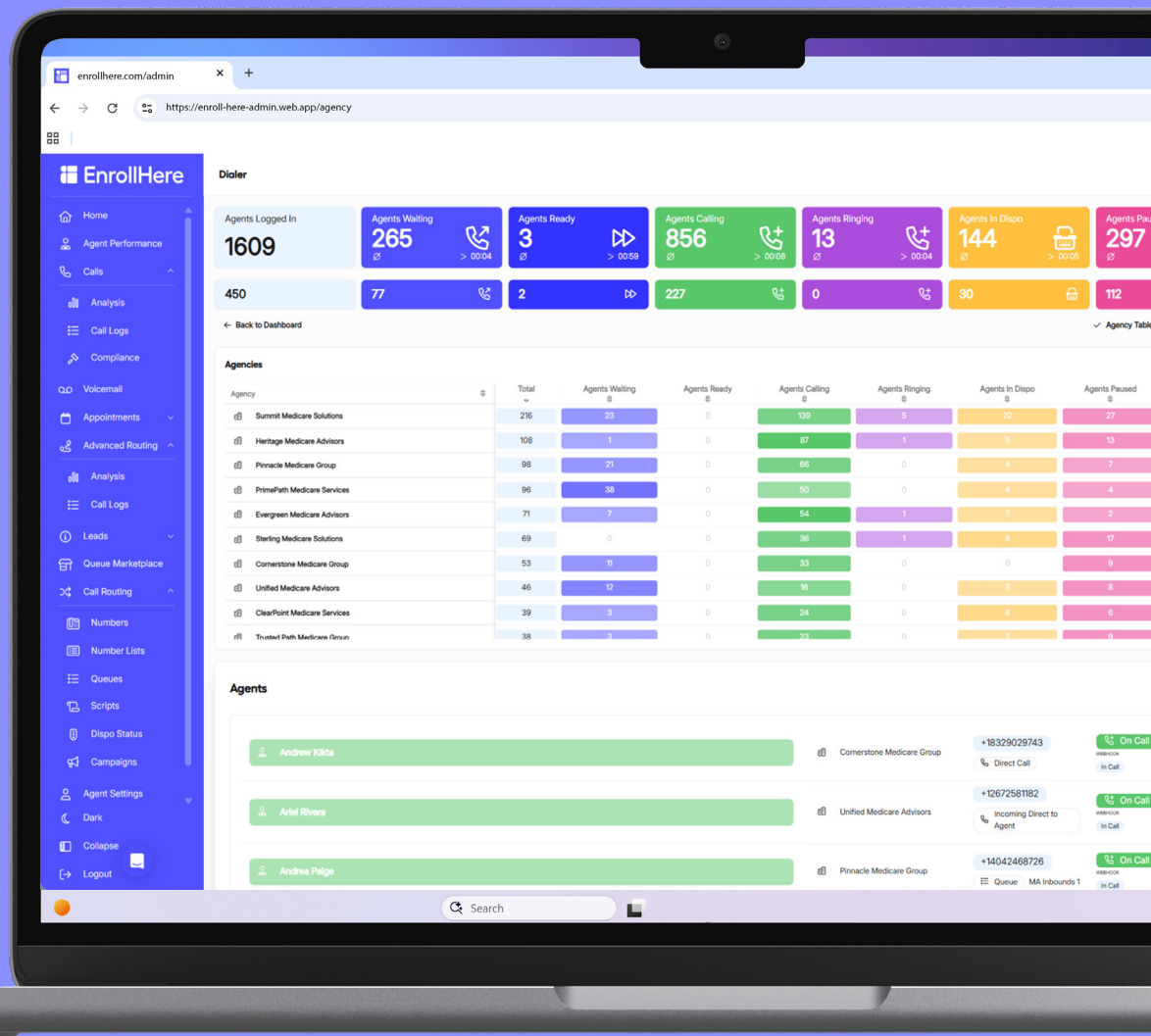
AmeriLife
Proven Result

33%

Higher Policy LTV

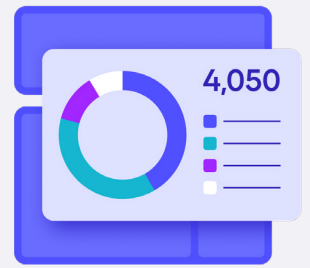
Qualified vs.
Benchmark

The EnrollHere platform organizes the people, processes, and operational intelligence that power modern insurance organizations. With one connected operating environment, leadership gains the visibility to improve performance, optimize operations, and scale with confidence.



THE PROBLEM

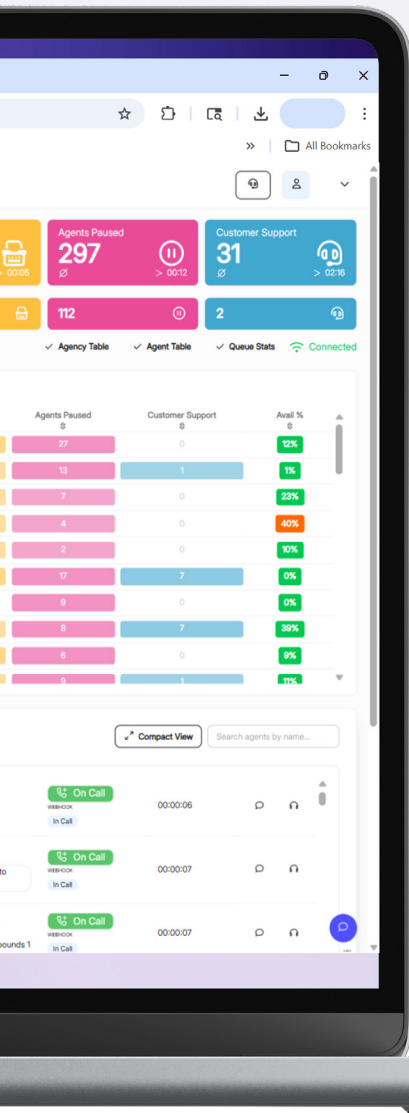
Why Is Your Agency So Difficult to Scale?



Growth gets harder when your data, teams and technology work across disconnected systems. Compliance, commissions, marketing, sales, policies and performance data live in different places, creating inefficient workflows, limited visibility and problems discovered too late.

The problem is fragmentation. Insurance technology has been built independently for decades, leaving agencies without one clear view of their entire business.

Better Operations Create Better Growth →



THE SOLUTION

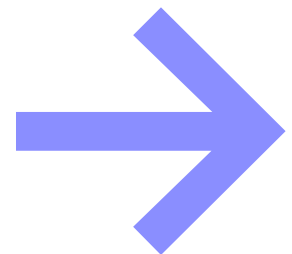
One Operating System for Your Entire Distribution Business

Connect the Operation

Bring compliance, commissions, marketing, sales, policies, communications, enrollment and reporting into one operational layer.

Create One Source of Truth

Your data, intelligence and operational controls finally work together instead of across disconnected systems.



See Your Entire Business, Down to the Agent

Complete Visibility

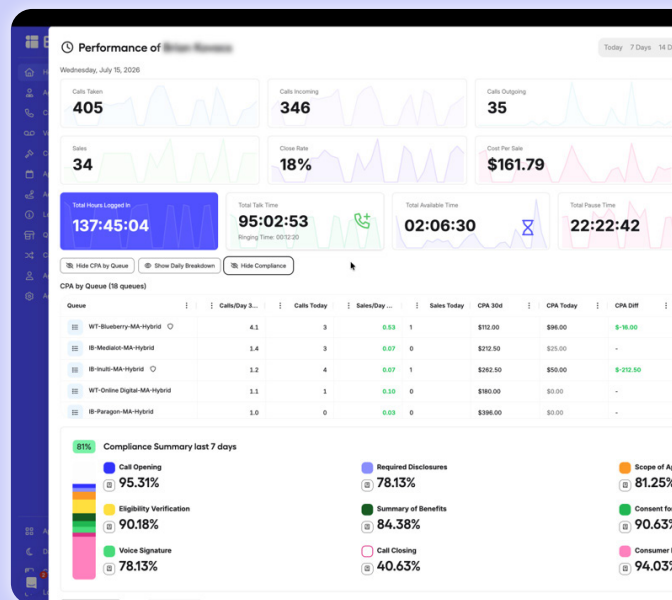
See what is happening across your entire distribution ecosystem, no matter how deep your hierarchy goes.

Know Your Numbers

Monitor agents, calls, sales, compliance and acquisition performance, then drill into any agent to see cost per sale, close rate, compliance score and more in real time.

Find Opportunities Faster

See who is performing, where agents are struggling and where management attention is needed.



AGENT PERFORMANCE

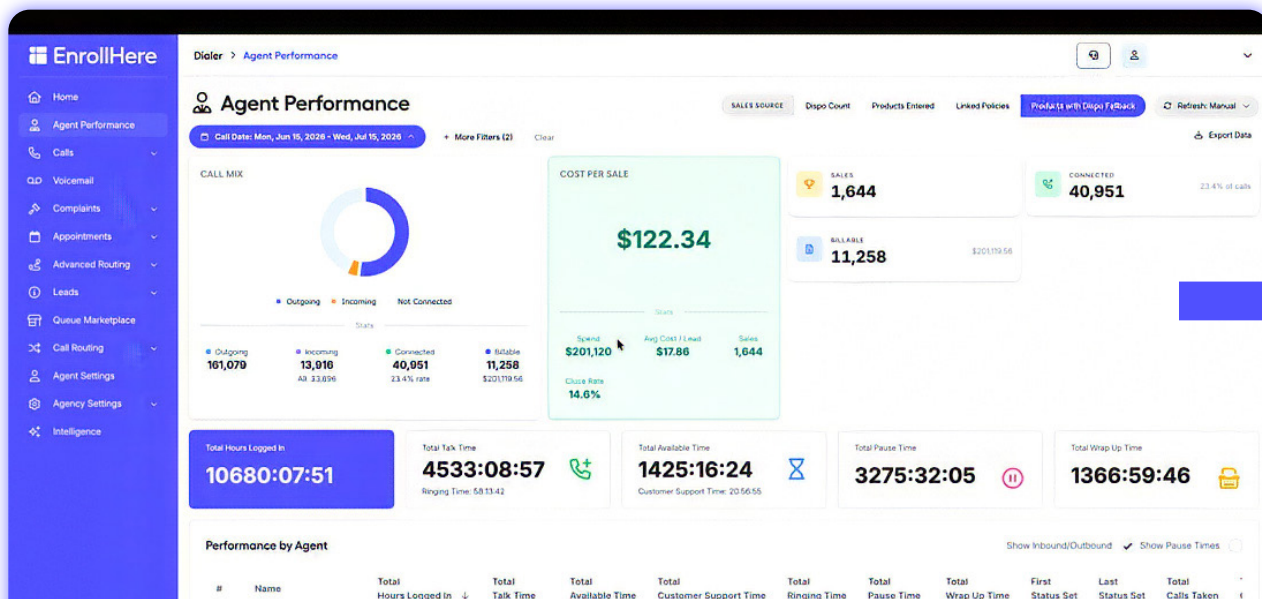
Know Where Every Agent's Time Goes

Measure Productivity

See how agents spend their day across customer conversations, dispositions, administrative work and other activity.

Connect Time to Results

Understand what that activity produces so managers can coach and optimize performance with real data.



DYNAMIC CALL CAPS

Control CPA Before It Controls You

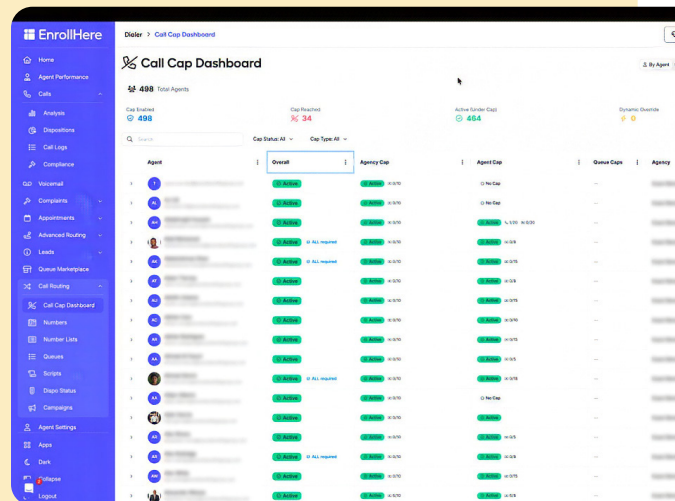
Control Lead Spend

Protect Acquisition Spend

Set dynamic call caps based on close rate or cost per acquisition to help control how marketing dollars are distributed.

Reward Performance

Automatically manage limits based on performance and extend opportunities when it makes business sense.



DISPOSITION REPORT

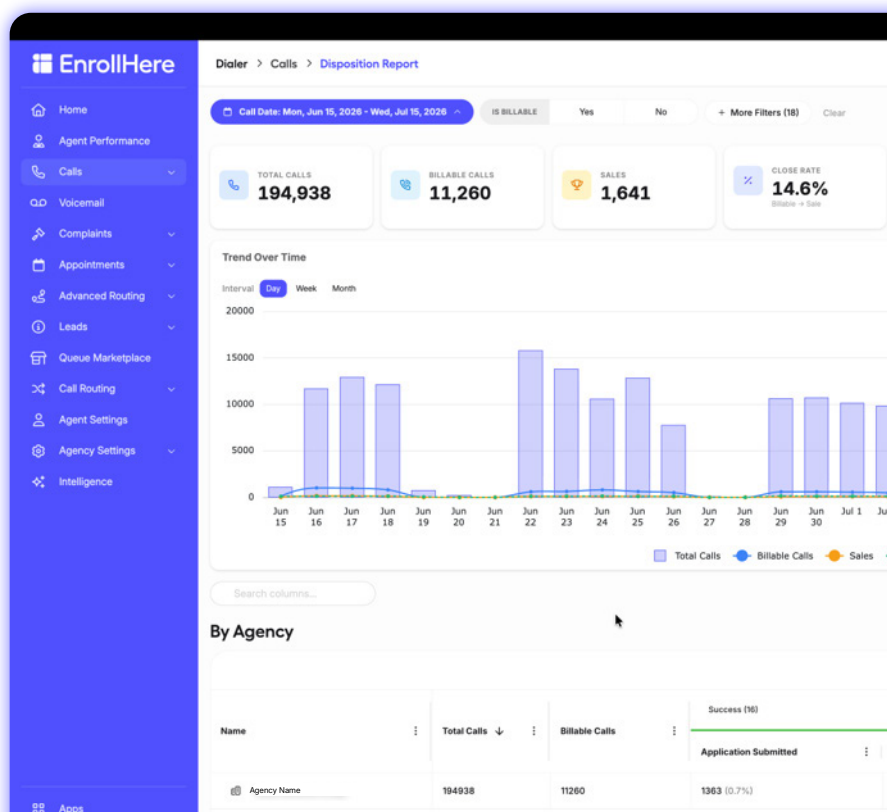
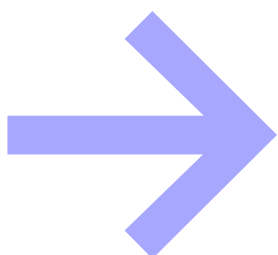
See How Every Call Resolves

Understand Outcomes

See how calls are dispositioned across your entire organization instead of relying on isolated reports.

Spot the Trends

Track changes over time to identify patterns, performance gaps and opportunities for improvement.



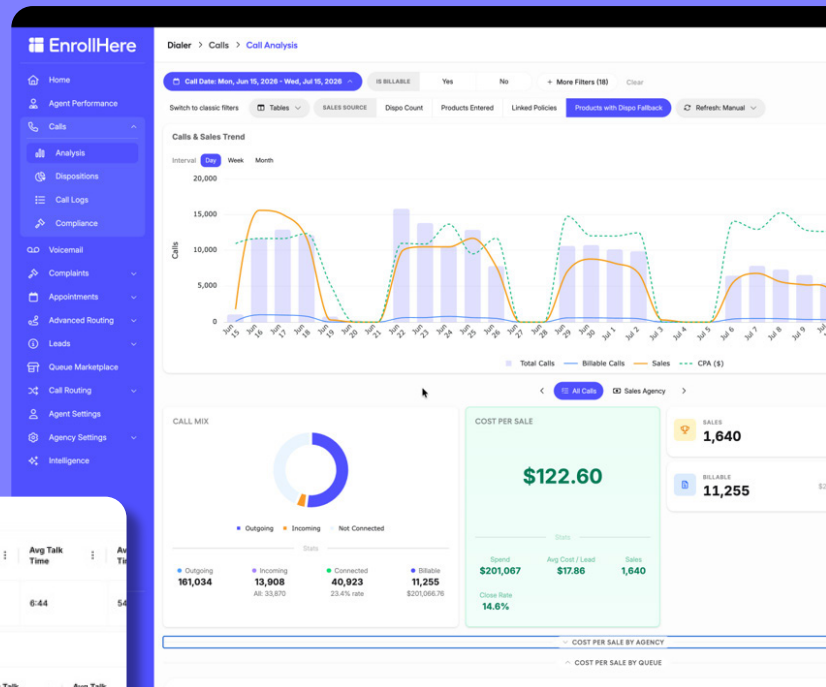
Know What Every Marketing Dollar Produces

Measure CPA in Real Time

See cost per sale by marketing channel while your campaigns are running.

Optimize Faster

Identify which channels are producing results so you can make better decisions about where to allocate spend.



Queue	Outgoing Calls	Incoming Calls	Burn Rate	Total Billable Calls	Total Billable Volume	Avg Talk Time	Avg Time Sale
LDZ INBOUND 1	148842	11737	11%	9980	\$175,648.00	6:44	54
LDZ MEDIA							
Agent	Outgoing Calls	Incoming Calls	Burn Rate	Total Billable Calls	Total Billable Volume	Avg Talk Time	Avg Time Sale
	8	209	12%	182	\$3,203.20	15:46	1:10:00
	59	188	7%	170	\$2,992.00	15:08	1:03:52
	1200	184	10%	163	\$2,868.80	2:37	50:45
	191	173	7%	160	\$2,816.00	8:25	46:51
	29	170	7%	158	\$2,780.80	12:58	1:12:44

CHANNEL DRILL-DOWN

Know Which Sources Actually Perform

Go Beyond the Channel

Drill into marketing performance down to individual agents and lead sources.

Find What Backs Out

See which sources produce sales and which ultimately fail to create valuable business.

Schedule a Demo →

AUTOMATIONS AND SCHEDULING

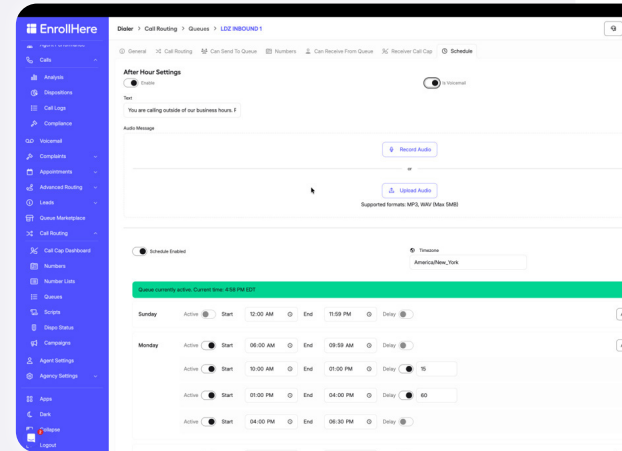
Automate How Your Business Operates

Respond to the Business Day

Automatically shift priorities, schedules and routing based on time of day and business hours.

Reduce Manual Management

Build operational rules into the platform so your team does not have to constantly make the same adjustments.



TAG-BASED ROUTING

Route the Right Calls to the Right Agents

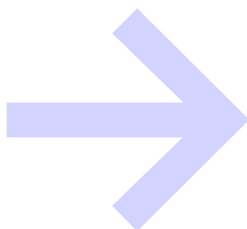
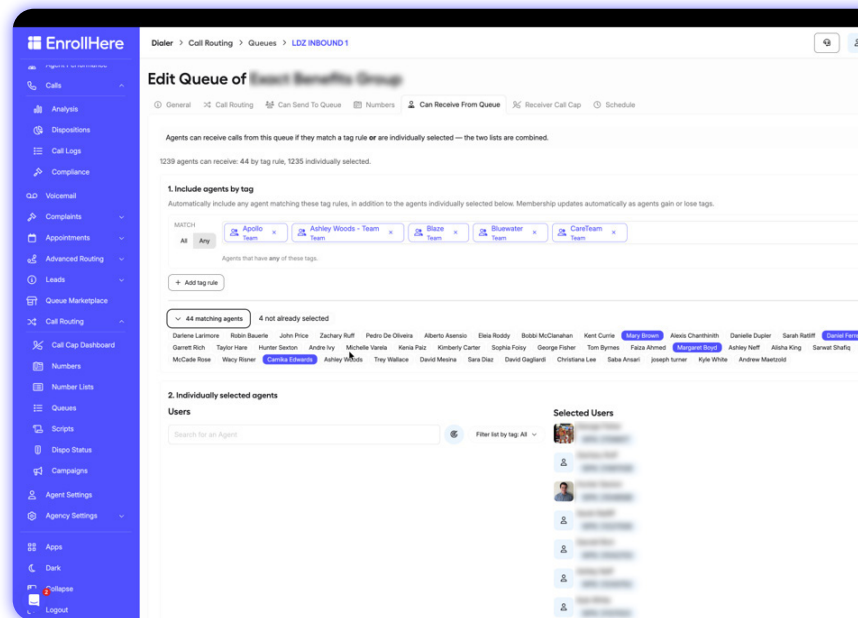


Route With Intelligence

Use tags to connect calls with agents based on criteria such as language, licensing, skill or campaign.

Scale Automatically

Tag agents once and allow new hires or changing teams to flow into the right routing structure.

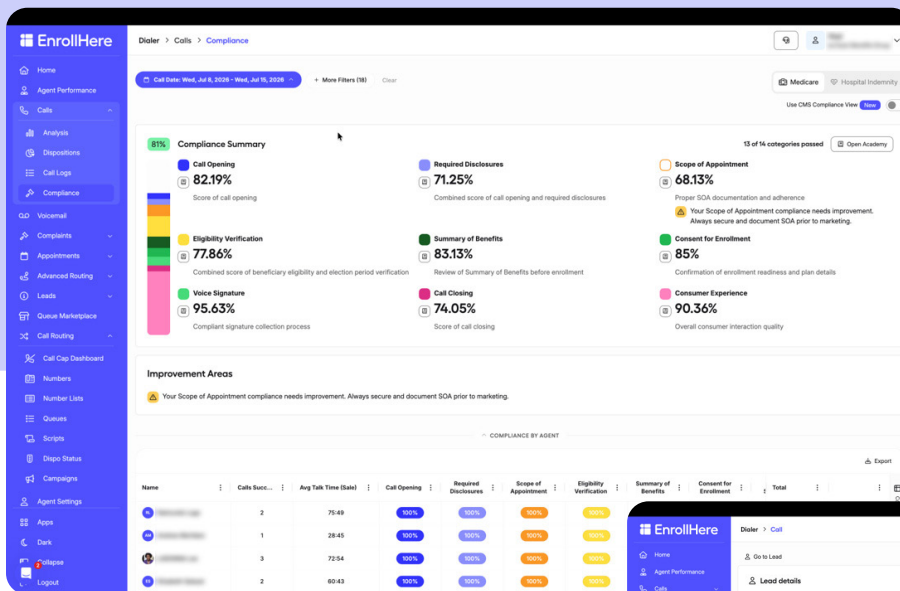


Make Compliance Part of Every Interaction

Score Performance Continuously

Evaluate agents and downlines against Medicare, ACA and final expense scorecards.

Governance Built-In

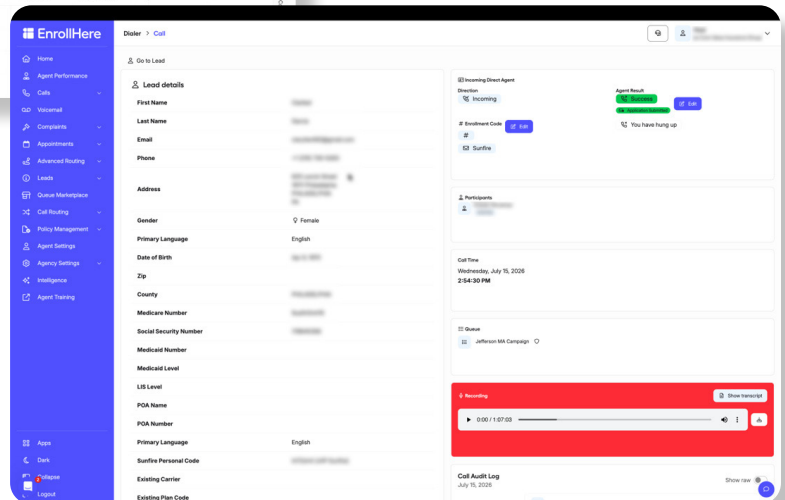


See Risk Earlier

Give compliance teams visibility into potential issues before they become larger operational problems.

CALL DETAIL

Every Call. Every Detail. One Place.

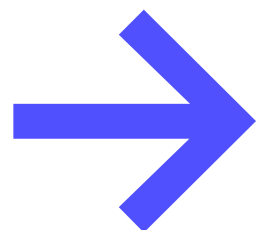


See the Full Interaction

Open a call to see the lead, recording, transcript, call path and outcome together.

Eliminate the Search

Give compliance and operations teams the evidence they need without pulling information from multiple systems.



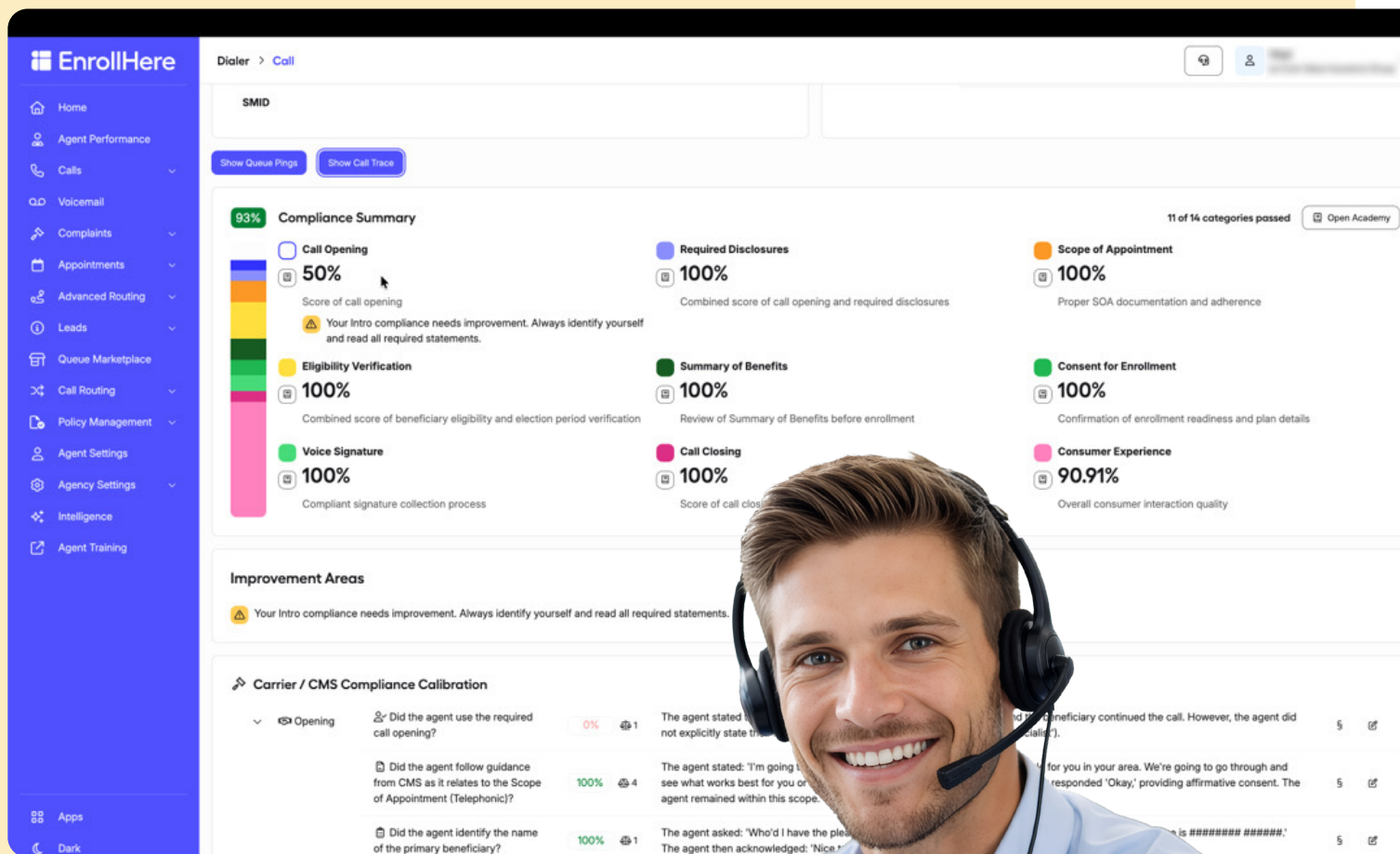
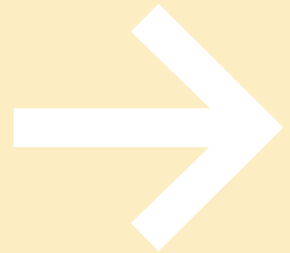
Turn Compliance Intelligence Into Better Performance

Understand the Score

Review transcribed evidence tied directly to individual compliance criteria.

Improve the Agent

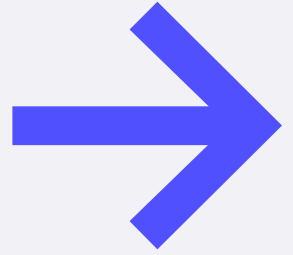
Use actionable insights to identify where agents can improve and focus coaching where it matters.



Build Confident Agents

COMPLAINT MANAGEMENT SYSTEM

Manage Every Complaint From One System

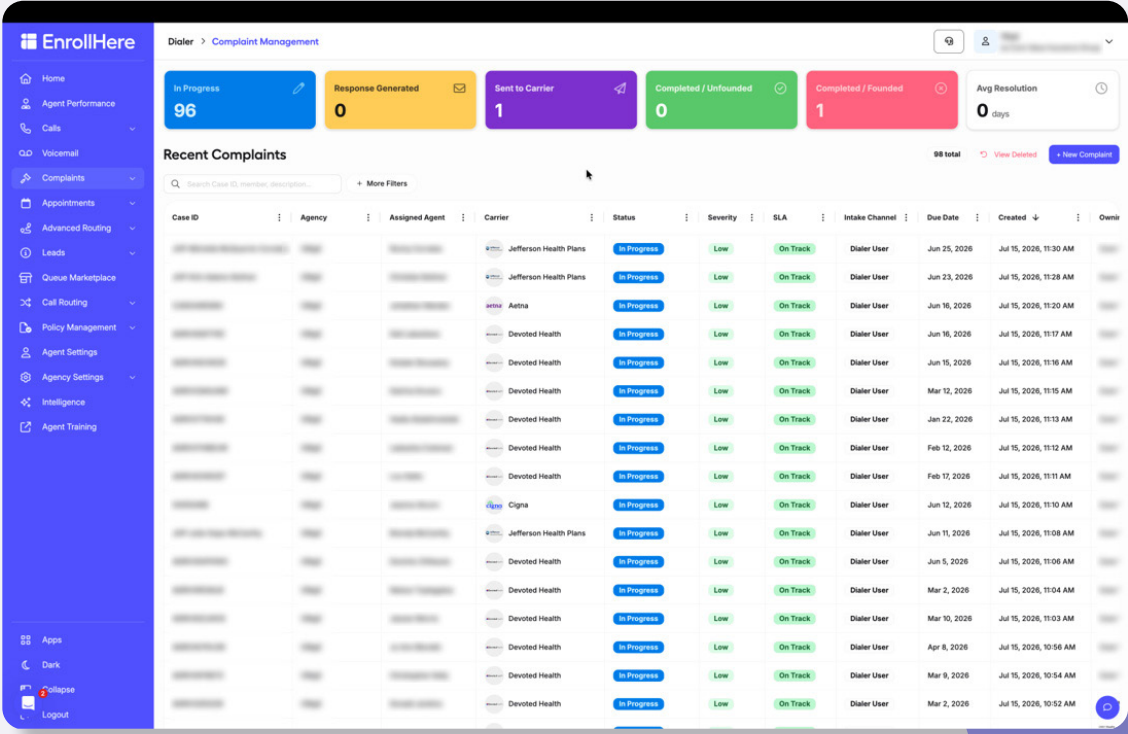


Centralize the Process

Track carrier complaints and CTMs from intake through investigation, response and resolution.

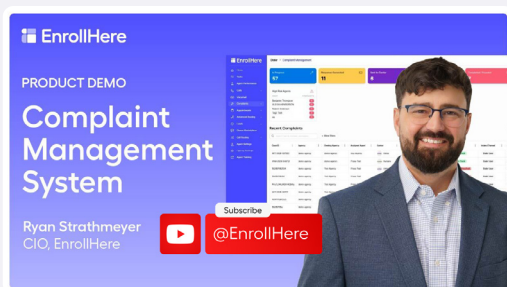
Connect the Evidence

Bring recordings, transcripts, documentation and complaint activity together so teams can respond efficiently and compliantly.



The screenshot shows the EnrollHere Complaint Management System interface. At the top, there are five status cards: 'In Progress' (96), 'Response Generated' (0), 'Sent to Carrier' (1), 'Completed / Unfounded' (0), and 'Completed / Founded' (1). To the right of these cards is a 'Avg Resolution' card showing '0 days'. Below the cards is a 'Recent Complaints' section with a search bar and a table of complaint records. The table has columns for Case ID, Agency, Assigned Agent, Carrier, Status, Severity, SLA, Intake Channel, Due Date, Created, and Owner. The table lists several complaints, mostly from Jefferson Health Plans and Devoted Health, all with a status of 'In Progress' and a severity of 'Low'. The interface also includes a left sidebar with navigation options like Home, Agent Performance, Calls, Voicemail, Complaints, Appointments, Advanced Routing, Leads, Queue Marketplace, Call Routing, Policy Management, Agent Settings, Agency Settings, Intelligence, and Agent Training. At the bottom right of the interface, there are buttons for 'View Details' and 'New Complaint'.

Case ID	Agency	Assigned Agent	Carrier	Status	Severity	SLA	Intake Channel	Due Date	Created	Owner
...	...	...	Jefferson Health Plans	In Progress	Low	On Track	Dialer User	Jun 25, 2026	Jul 15, 2026, 11:30 AM	...
...	...	...	Jefferson Health Plans	In Progress	Low	On Track	Dialer User	Jun 23, 2026	Jul 15, 2026, 11:28 AM	...
...	...	...	Aetna	In Progress	Low	On Track	Dialer User	Jun 16, 2026	Jul 15, 2026, 11:20 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Jun 16, 2026	Jul 15, 2026, 11:17 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Jun 15, 2026	Jul 15, 2026, 11:16 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Mar 12, 2026	Jul 15, 2026, 11:15 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Jan 22, 2026	Jul 15, 2026, 11:13 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Feb 12, 2026	Jul 15, 2026, 11:12 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Feb 17, 2026	Jul 15, 2026, 11:11 AM	...
...	...	...	Cigna	In Progress	Low	On Track	Dialer User	Jun 12, 2026	Jul 15, 2026, 11:10 AM	...
...	...	...	Jefferson Health Plans	In Progress	Low	On Track	Dialer User	Jun 11, 2026	Jul 15, 2026, 11:08 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Jun 5, 2026	Jul 15, 2026, 11:08 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Mar 2, 2026	Jul 15, 2026, 11:04 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Mar 10, 2026	Jul 15, 2026, 11:03 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Apr 8, 2026	Jul 15, 2026, 10:56 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Mar 9, 2026	Jul 15, 2026, 10:54 AM	...
...	...	...	Devoted Health	In Progress	Low	On Track	Dialer User	Mar 2, 2026	Jul 15, 2026, 10:52 AM	...



Watch our YouTube demo to see complaint management in action.

QUEUE SETTINGS

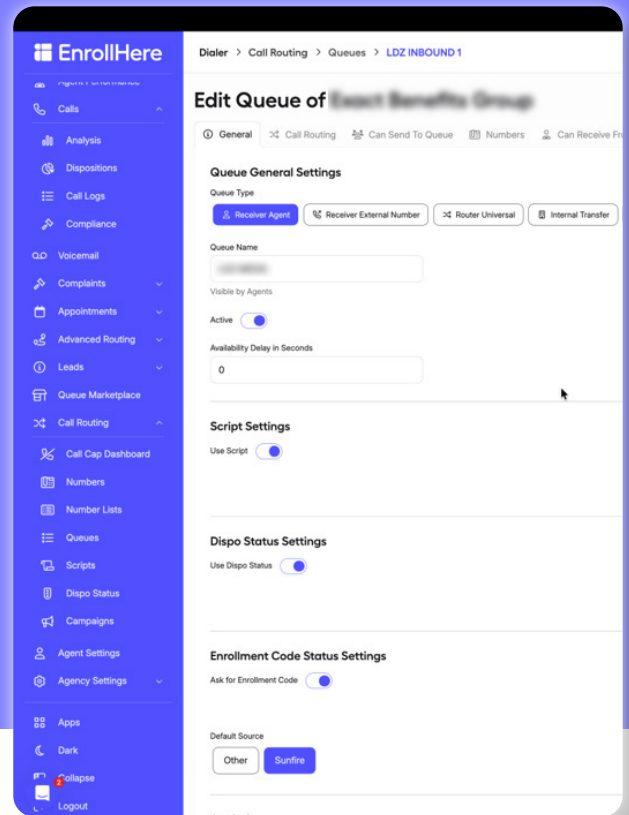
Control How Every Call Flows

Configure Every Queue

Set priorities, scripts and dispositions based on the needs of each campaign or channel.

Operate Your Way

Build call flows around your business instead of forcing your operation into a generic dialing system.



CUSTOM SCRIPTS AND DISPOSITIONS

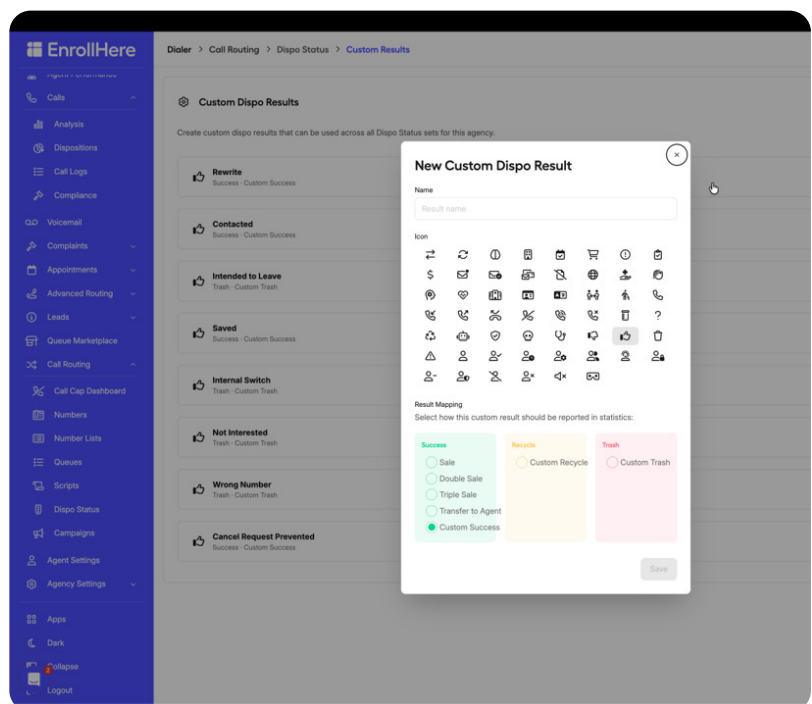
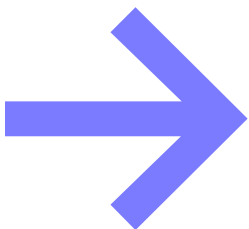
Configure EnrollHere Around Your Operation

**Build for Your Business**

Create custom scripts and dispositions for different products, campaigns and verticals.

Built by Operators

EnrollHere was built by people who understand the operational realities of insurance distribution.



LIVE CALL VIEW

Give Agents Everything They Need to Sell

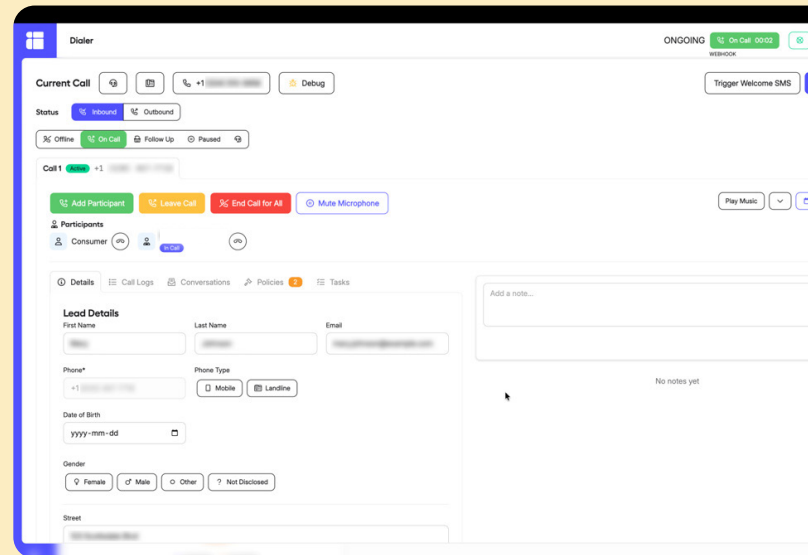
Improve Sales Performance

Start With Context

When a call arrives, agents see where it came from, the appropriate script and lead information in one view.

Guide the Conversation

Lead enrichment and connected data give agents the information they need while they work through the call.



ONE SCREEN

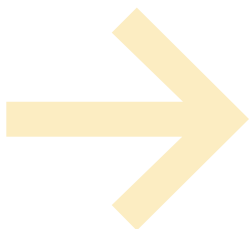
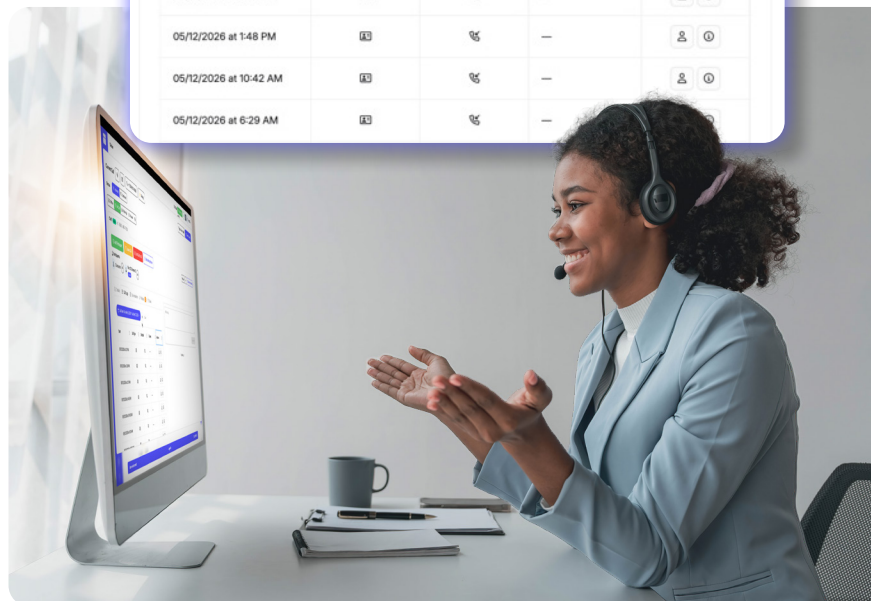
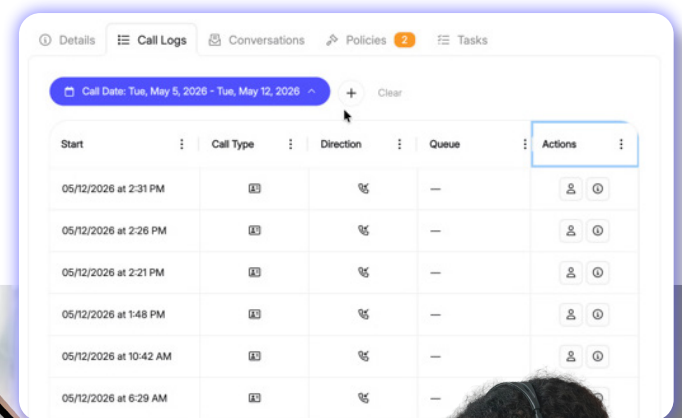
No More Juggling Five Systems

One Place to Work

Give agents access to consumer information, call history and previous interactions from one screen.

Operate More Efficiently

Reduce the constant switching between systems that slows agents down and creates unnecessary administrative work.



CONSUMER CONTEXT

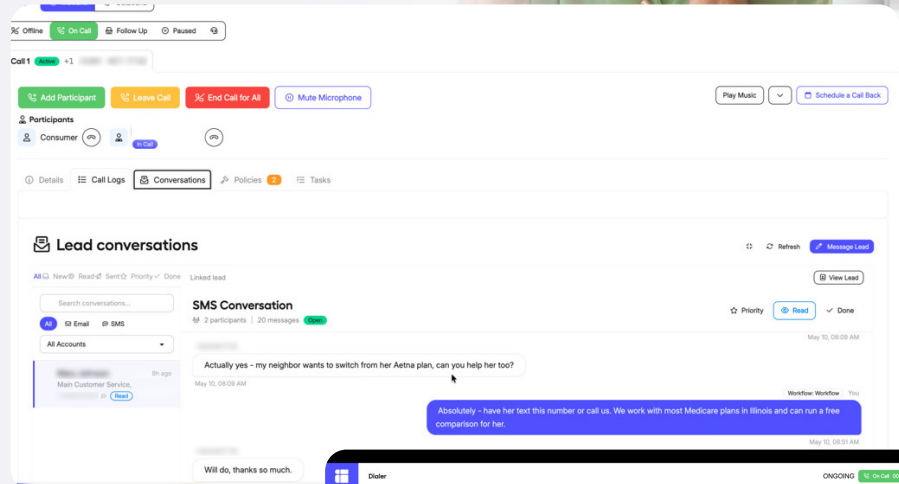
Give Agents the Full Consumer Story

Know the History

See previous calls, SMS conversations and other consumer interactions before starting the conversation.

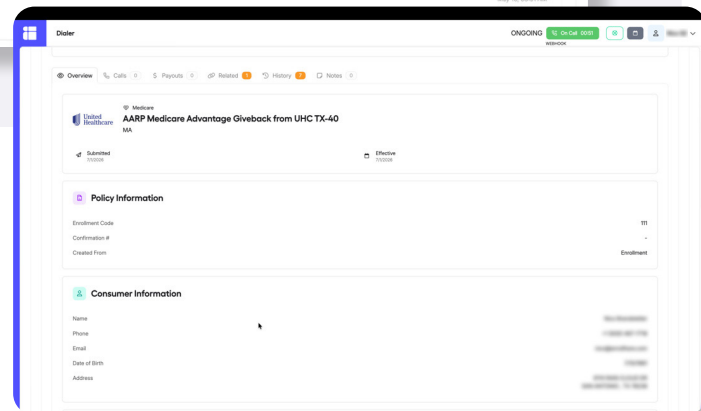
Create Continuity

Agents have the context to understand what has already happened and serve the consumer more effectively.



EXISTING POLICIES

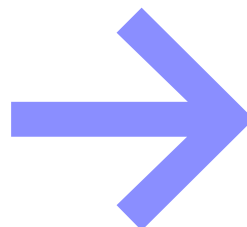
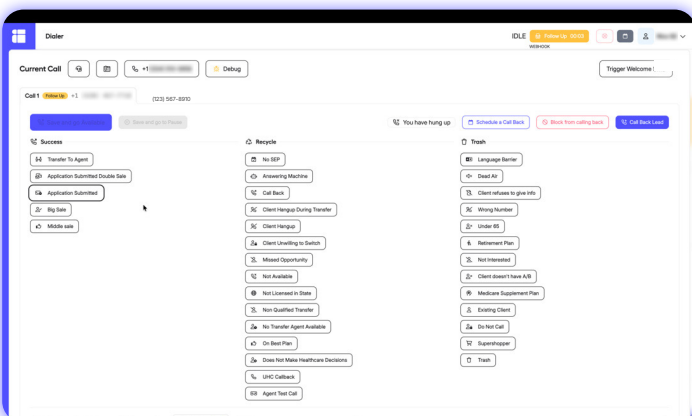
Put Policy Information at Their Fingertips

**See Existing Coverage**

Give agents visibility into policies already associated with the consumer.

Keep Everything Connected

Because policy and consumer data live in the same system, agents do not have to search somewhere else for answers.



POST-CALL SUBMIT

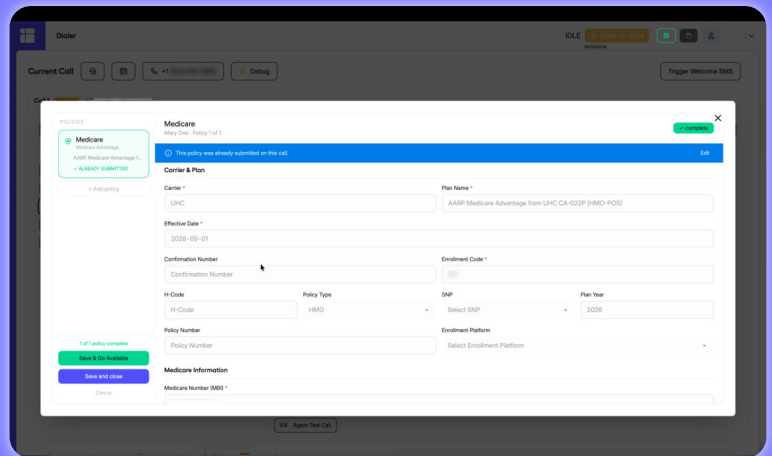
Close the Sale Without Re-Keying the Data

Improve Productivity**One Connected Workflow**

When a sale closes, agents can submit the information through the same operating environment.

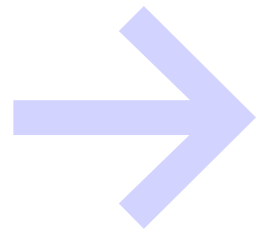
Reduce Duplicate Work

Eliminate unnecessary re-entry of information across disconnected systems and workflows.



AGENT TROUBLESHOOTING

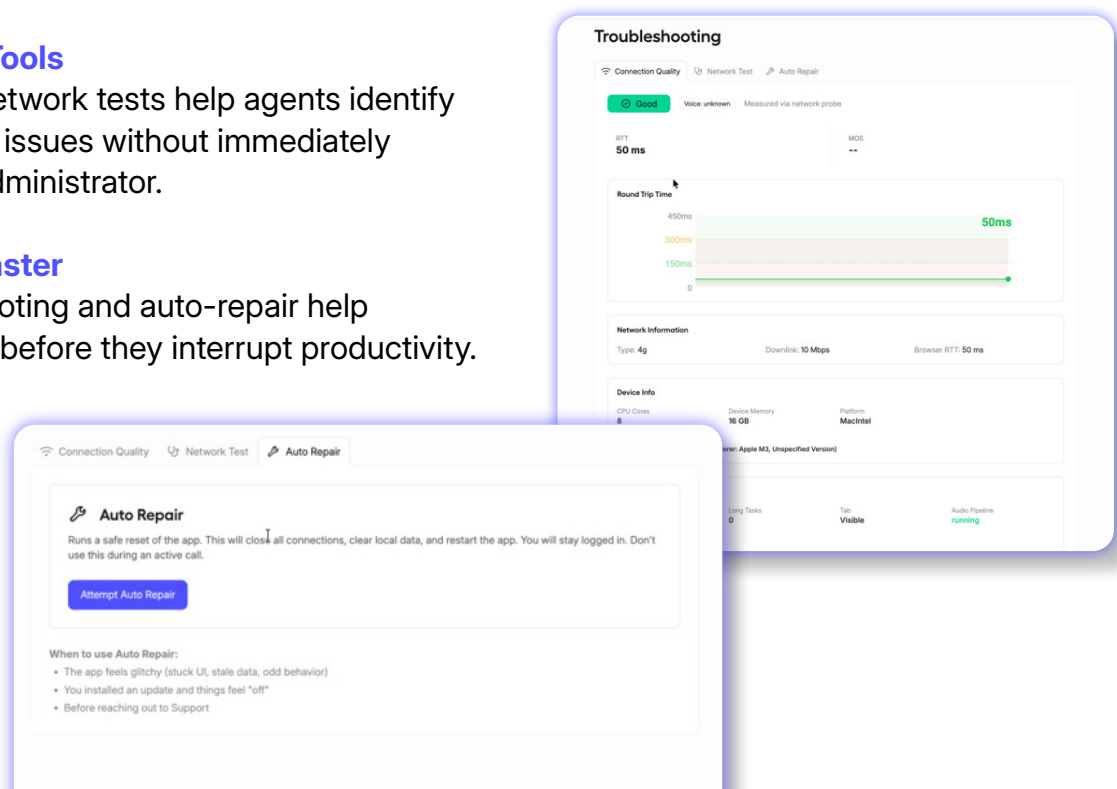
Solve Connectivity Problems Before They Escalate

**Give Agents the Tools**

Connection and network tests help agents identify common telesales issues without immediately escalating to an administrator.

Resolve Issues Faster

Built-in troubleshooting and auto-repair help address problems before they interrupt productivity.



BOOK OF BUSINESS

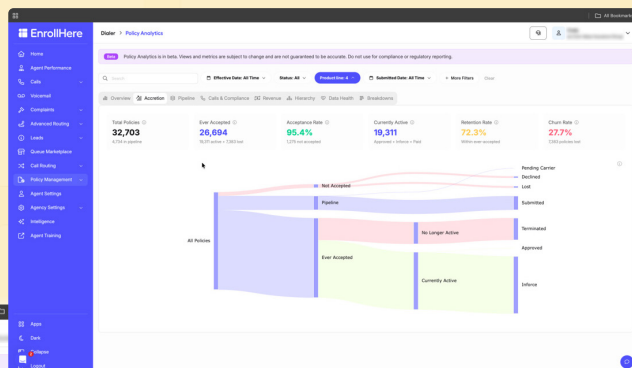
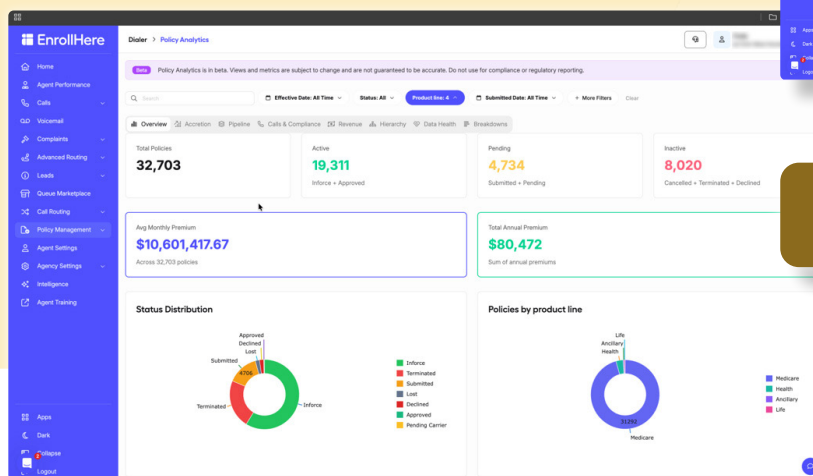
See Your Entire Book of Business

One Policy View

See submitted, pending, in-force and terminated policies across your organization.

One Source of Truth

Connect policy activity with the agents, consumers, products and operational data behind it.



Protect Enterprise Value

BACK-END PERFORMANCE

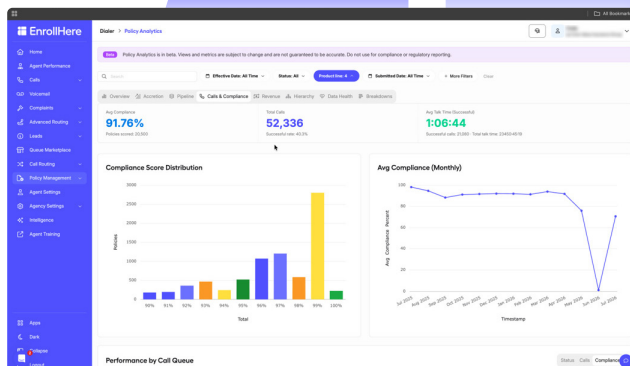
Know What Happens Long After the Sale

Look Beyond CPA

A low acquisition cost means little if the business does not stay on the books.

Understand Long-Term Value

Connect acquisition data with policy performance to understand which channels, agents and strategies create lasting value.



DATA HEALTH

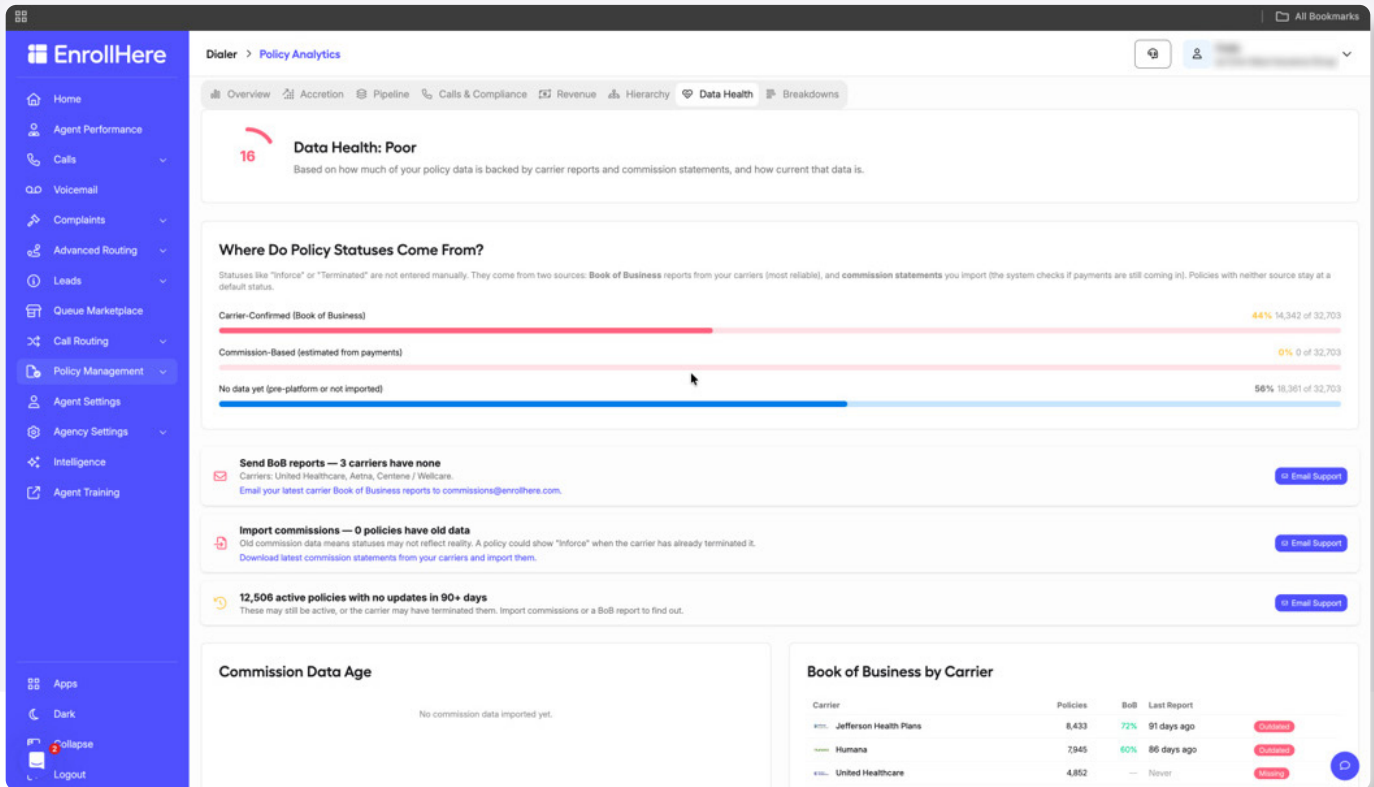
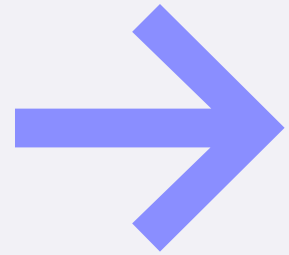
Know the Health of Your Data

Bring the Data Together

Connect carrier reports, commission statements and book-of-business data within the same operating environment.

Be Proactive

Data health monitoring gives your team visibility into the condition of your data before an issue affects the business.



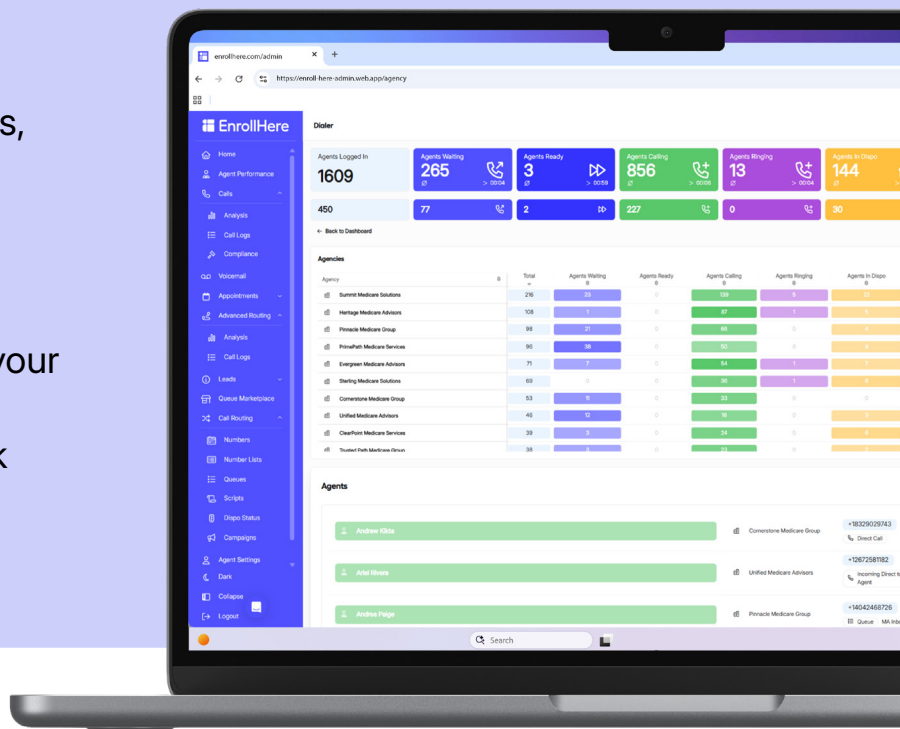
Getting Started With EnrollHere

Start With Your Operation

Your EnrollHere team works to understand your hierarchy, workflows, users, data, routing, compliance requirements and business goals.

Build for Your Business

Configure the platform around how your organization operates, connect your data and prepare your teams to work from one system.



PREPARE TO GROW

Ready to Run Your Business Differently?

One System of Record

Run your entire distribution business better with data, intelligence and operational controls finally in the same place.

Built to Help You Scale

See what is working, identify what is not and put the controls in place to operate more efficiently, compliantly and profitably.