EnrollHere

Sprint Updates

New platform enhancements that simplify operations, improve productivity and strengthen reliability.

September 21-25, 2026 | 45 New & Improved Features

FEATURED ENHANCEMENTS

5 Categories

Dialer: Queues Campaigns and Leads

- **Targeted Precall Checks**
  Precall checks can exclude only agents with matching tags, minimizing unnecessary disruption across other queues and agent groups.
- **Tag-Based Queue Prioritization**
  Agencies can advance or delay tag-based agent groups without managing individual agent rules.
- **Cross-Agency Queue Work**
  Authorized users can select lead lists across agencies for queue and mass-editing workflows.
- **Lead Prioritization in Preview Dialing**
  Lead-priority groups are available in preview dialing, helping agents work the most valuable leads first.
- **Call-Outcome Eligibility Controls**
  Agencies can choose which call outcomes remain eligible for future dialing, providing more precise campaign controls.
- **Campaign Priority-Group Management**
  Campaign priority groups can be added or removed as campaign strategies change.
- **Campaign Number Health**
  Number Pool links and badges connect users directly to campaign-specific number-health information.
- **Adaptive Pacing**
  Adaptive pacing can increase above a 1-to-1 ratio when campaign conditions allow, expanding productive calling capacity.
- **Tag-Based Routing Exclusions**
  Waiting-call exclusion tags apply to the intended agent groups without suppressing unrelated agents.
- **Number Pool Management**
  Agencies receive default number pools with configurable removal destinations, source-list claiming and consistent onboarding assignments.

Policy Management

- **Policy Quality Controls**
  Duplicate-policy reviews evaluate product and agency-hierarchy information to reduce false matches.
- **Customer-Based Bulk Policy Actions**
  Users can select customers in bulk for ownership changes, task creation and related policy or lead actions.
- **Consistent Premium Cadence**
  Imported enrollments receive a derived premium cadence when it is not included in the source data, supporting consistent payment and reporting workflows.
- **Protected Policy and Payment Updates**
  Policy and payment changes are applied only when the reviewed record remains current, protecting later updates from being overwritten.
- **Complete Book of Business Exports**
  Book of Business exports include all available columns, reducing manual reconciliation and additional reporting work.

Intelligence

- **Core Values Performance Reporting**
  Core Values metrics can appear in Agent Performance reporting, giving leaders more visibility into agent behaviors.
- **Private Operational Recommendations**
  Recommendation conversations are visible only to recipients who have opted in, aligning in-platform access with email delivery.
- **Easier Recommendation Access**
  Users can open recommendation conversations from shared links and review them in a clearer, more readable experience.

See Page 2 for additional featured enhancements. ↓

Compliance Management

- **Reliable Compliance Scorecards**
  Scorecards can launch through import events, policy-based evaluations and transcript analysis with built-in retry support.
- **Simplified Scorecard Access**
  Scorecard permissions remain aligned as agency structures and user access change.
- **Continuous Call-Quality History**
  Related calls retain completed compliance analyses, providing a more complete view of call quality.
- **Live Call Media Streaming**
  Agencies can stream live call media to approved external destinations for quality assurance, compliance, AI and transcription workflows.
- **Scorecard Activation Controls**
  Authorized operators can enable compliance scorecards through Admin Features.
- **Dependable Scorecard Processing**
  Scorecard capacity and matching rules remain available across operational scoring workflows.
- **Consistent Scorecard Configuration**
  Scorecard settings are stored and evaluated consistently while supporting existing keyword configurations.
- **Required Completion Notes**
  Agencies can require completion notes to improve accountability, auditability and the accuracy of recorded outcomes.
- **Privacy-Protected Transcripts**
  Redacted transcripts retain the agent-state context needed for quality review while protecting sensitive information.

Agency Operations: Administration Automation and Access

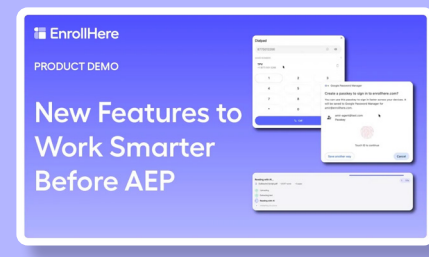
- **FMO-Specific Tags**
  Agencies can apply permanent FMO-specific tags across the platform to support more targeted operations.
- **Tag-Based Dialer Subscriptions**
  Agencies can set prices by tag and guide invited agents into the appropriate subscription and onboarding experience.
- **Cross-Agency Operations**
  Authorized users can select and retain lead lists across agencies with clear ownership information and access controls.
- **Automated Post-Sale Journeys**
  Medicare follow-up can include consent-aware messages, verification tasks, effective-date waits and longer-term customer outreach.
- **Consistent Premium Reporting**
  Derived premium cadence supports more consistent annualized premium reporting across current and historical policy records.
- **Protected Messaging Capacity**
  Personal phone enrollment is limited to users with Dialer access, preserving messaging capacity for eligible agents.
- **Reliable Automation Settings**
  Lead lists, automation names and do-not-call settings remain consistent as workflows are updated.
- **Compact Platform Navigation**
  A compact sidebar provides more usable workspace while keeping support and account controls accessible.
- **Multi-Team Appointment Management**
  Authorized employees can filter appointments across one or more teams while maintaining existing access controls.
- **Custom Dispositions in Workflows**
  Workflows can select and apply agency-defined dispositions, improving transfer attribution and call-state accuracy.
- **Role-Based AI Training Access**
  Agencies can manage AI Training access by role while supporting individual exceptions.
- **Transcript Privacy**
  Call transcripts preserve the context required for quality review while protecting sensitive health and financial information.
- **Unified Agent Administration**
  Dialer Agent Settings use the platform's shared user-management experience for more consistent administration.
- **Clearer Agent Activity**
  Time-card indicators provide a clearer view of agent activity and performance.
- **Automated Lead Import Workflows**
  A selected workflow can begin automatically after Dialer leads are imported, reducing manual follow-up.
- **Direct ACA Quoting**
  HealthSherpa-connected agents can launch ACA quotes directly from the EnrollHere platform.
- **Leaderboards for Every Agency**
  Leaderboards are available to every agency with controls for roles, audiences, metrics and visibility.
- **Custom Workflow Timing**
  Workflow wait conditions recognize agency-defined dispositions, allowing customized processes to advance at the appropriate time.

EnrollHere Product Demos

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7 New Features to Help Your Team Work Smarter Before AEP

AEP puts added pressure on every agency workflow, so EnrollHere introduced seven features to reduce repetitive work, prevent errors and improve efficiency. Updates include saved dial numbers, licensed-agent routing, passkey sign-in, bulk number purchasing, document-based call scripts, bulk actions for leads and policies, and plan suggestions during policy entry. Together, these improvements remove unnecessary steps so agents can focus on customers during AEP.



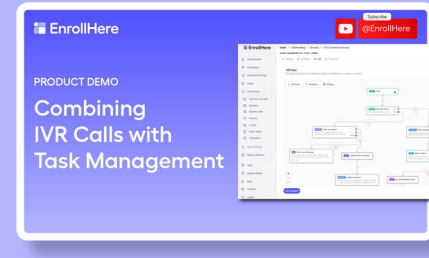
Understanding Lifetime Value for Your Book of Business

What is your book of business really worth and how much future revenue can it generate? In this EnrollHere product demo, Sawyer Nyquist, Head of Data at EnrollHere, walks through how EnrollHere's Lifetime Value (LTV) calculations help insurance agencies understand the current and future value of their policies.



Turn Customer Calls Into Actionable Follow-Ups

Every customer interaction deserves a timely response, even when agents are unavailable. EnrollHere now connects interactive voice response calls directly to task management, automatically creating and assigning follow-up tasks based on each caller's needs.



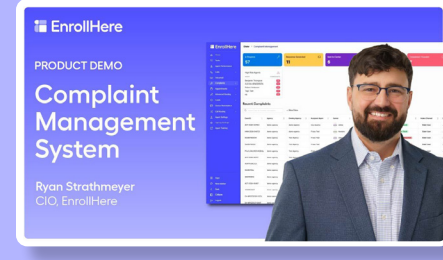
Intelligence Chat: Your On-Demand Data Analyst

See how Intelligence Chat answers real-time questions and uncovers insights across call center performance, compliance and policies. Sawyer Nyquist demonstrates how teams can investigate complex business questions using their data.



Complaint Management System

The EnrollHere Complaint Management System centralizes the complaint lifecycle, from AI-powered intake to investigation, carrier response and resolution. Teams can connect recordings and documents, track SLA deadlines, identify trends and maintain a complete audit trail. Complaint Management is included with EnrollHere Connect™ and Complete™ or available as a standalone solution.



Questions about these updates?

Contact your EnrollHere customer success manager or email support@enrollhere.com.