EnrollHere

Sprint Updates

New platform enhancements designed to improve campaign control, streamline agency workflows and give teams greater operational visibility.

Sept. 28 - Oct. 2, 2026 | 20 New & Improved Features

FEATURED ENHANCEMENTS

7 Categories

At a Glance

This week's updates include:

- More precise campaign and dialing controls
- Stronger cross-agency access and administration
- Expanded policy and compliance workflows
- More flexible task and workflow automation
- Improved navigation and recommendation privacy

Lead Management

- **More Precise Campaign Outreach**
  Choose callable outcomes, prioritize leads and manage campaign groups while adaptive pacing increases capacity within abandonment safeguards.
- **Cross-Agency Lead Access**
  Authorized users can select shared lead lists directly within queue settings while access controls protect agency data.
- **Agent Calling Setup**
  Agency-specific number pools simplify number assignment and offboarding. Personal phone enrollment is limited to agents with Dialer access, helping preserve messaging capacity.
- **Campaign Number Health**
  The Number Pool indicator connects users directly to health information for the selected campaign.

Agency Administration and Onboarding

- **Tag-Based Pricing and Onboarding**
  Subscription pricing can vary by agent tag, and invited agents can be directed into the appropriate onboarding experience.
- **Role-Based AI Training Access**
  Agencies can set default AI Training access by audience while allowing individual exceptions.

Policy Management

- **Duplicate-Policy Review**
  Identify likely duplicates across products and agency hierarchies without automatically merging records.
- **Customer-Based Bulk Actions**
  Users can select customers in bulk to complete related policy and lead actions, reducing repetitive administrative work.

Call Quality and Compliance

- **Scorecard Readiness**
  Strengthens scorecard controls, permissions and scoring across related call segments. Availability varies by agency configuration.
- **Enhanced Transcript Review Context**
  Redacted transcripts retain additional context to support call-quality review.
- **Live Call Audio Streaming**
  Agencies can stream live call audio to approved external quality assurance, compliance, AI and transcription tools.

Task and Workflow Automation

- **Automated Lead Import Workflows**
  Imported leads can enter a selected workflow after an owner is assigned, reducing manual follow-up setup.
- **Required Task Completion Notes**
  Agencies can require completion notes for selected tasks, creating a clearer record of completed work.
- **Custom Call Outcomes in Workflows**
  Workflows can select, match and update agency-defined call outcomes to support customized processes.

See Page 2 for additional featured enhancements. ↓

Everyday Usability

- **Multi-Team Appointment Search**
  Authorized employees can filter appointments across accessible teams while maintaining appointment privacy.
- **Compact Platform Navigation**
  A compact sidebar creates more usable workspace while keeping platform navigation and account controls accessible.
- **Centralized Agent Administration**
  Agent administration is available within Dialer Settings, reducing the need to move between management screens.
- **Clearer Settings and Agent Activity**
  Improved settings navigation and time-card indicators make agent activity easier to review.

Data and Insights

- **User-Managed Intelligence Recommendations**
  Users can manage Intelligence Recommendation settings directly within the application.
- **Expanded Intelligence Agent Capabilities**
  Intelligence Agent can plan multi-step tasks and complete longer-running investigations.

Feature availability may vary based on your agency's platform configuration and permissions.

Questions about these updates?

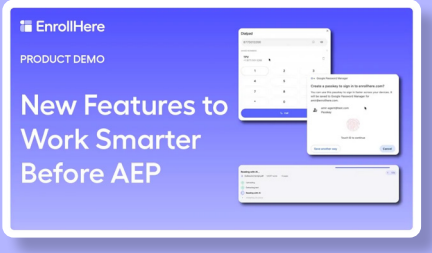
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EnrollHere Product Demos

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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.



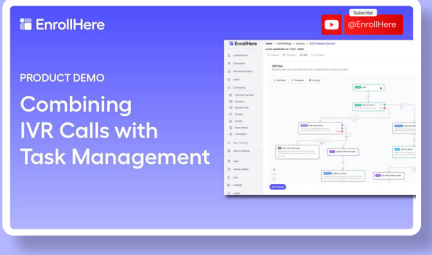
Understanding Lifetime Value for Your Book of Business

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.



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.

