EnrollHere

Sprint Updates

New platform enhancements designed to strengthen campaign performance, improve compliance visibility and simplify agency administration.

October 5-9, 2026 | 41 New & Improved Features

FEATURED ENHANCEMENTS

4 Categories

At a Glance

This week's updates include:

- Smarter outbound pacing and licensed-agent routing
- More flexible AI campaign and holiday controls
- Clearer compliance scoring and performance reporting
- Streamlined navigation and agency administration
- Improved licensing, policy and automation workflows



Campaigns Calling and Routing

- **Smarter Outbound Pacing**
  Outbound dialing volume can adjust to the number of available agents licensed for the lead's state, reducing the risk of answered calls without a qualified agent.
- **Transfer-Aware AI Campaigns**
  AI campaigns can slow or stop dialing when no agents are available in the human transfer queue.
- **Area-Code-Based Routing**
  Teams can choose to bypass publisher-provided routing data and route calls by area code.
- **Expanded Licensed-Agent Routing**
  Licensed-state information is available during routing so qualified agents remain eligible to receive calls.
- **More Reliable Call Connections**
  Rejected call connections no longer leave agents attached to inactive calls.
- **Flexible Wallet Requirements**
  Agents without a wallet balance can join outbound campaigns that do not charge a per-minute rate.
- **Accurate Callable-Lead Previews**
  Campaign previews exclude leads that have already reached their call limit.
- **Safer ZIP Code Restrictions**
  Empty ZIP code restrictions no longer prevent eligible leads from entering a campaign.
- **More Natural AI Conversations**
  AI agents follow cleaner conversation controls that prevent internal notes from being spoken, repeated greetings and interrupted goodbyes.
- **Holiday Scheduling and Routing**
  Agencies can configure shared holiday calendars, partial-day closures, custom greetings and holiday-specific routing.
- **Expanded Inbound Text Support**
  Inbound messages from short codes, short numbers and other nonstandard senders are preserved.
- **Clearer Number Onboarding**
  When phone numbers are unavailable, users receive a clear explanation instead of an empty onboarding screen.
- **Flexible Successful Outcomes**
  Agents can record custom successful outcomes without entering unnecessary policy or product information.
- **Active Listener Visibility**
  Supervisors can see who is already monitoring a call before joining.
- **Call-Monitoring Activity History**
  Supervisor listening activity is recorded in the agency activity log.
- **Clearer Campaign Settings**
  Campaign guidance remains readable without overlapping nearby settings.

See Page 2 for additional featured enhancements. ↓

Compliance Scoring and Reporting

- **More Efficient AI Scoring**
  Duplicate scoring is reduced, and successful calls can receive default scoring when appropriate.
- **Automated Background Scoring**
  Eligible scoring workflows can run automatically without displaying unnecessary configuration tools to users.
- **Transcript-Ready Scoring**
  Eligible calls wait for completed transcripts before scoring begins, reducing incomplete or unsuccessful evaluations.
- **Reliable Scorecard Editing**
  Authorized users can save scorecard changes and receive clearer guidance when permissions are required.
- **Simplified Scorecard Indicators**
  Scorecards use a cleaner scoring structure while preserving established weighting and automatic-failure rules.
- **Cleaner Low-Score Reviews**
  Empty review cards are removed from low-score workflows.
- **Stable Compliance Tables**
  Compliance tables remain visible while information refreshes.
- **Date-Aligned Compliance Reporting**
  Compliance totals and recent-call lists reflect the reporting dates selected by the user.
- **Readable Compliance Exports**
  Compliance exports display agent and agency names instead of internal identifiers.
- **Agent and Team Tag Filters**
  Leaders can filter agent performance by agent and team tags.
- **Current-Day Reporting**
  Current-day activity is included while preserving historical totals for the selected reporting period.
- **Flexible Outbound Reporting**
  Custom date ranges and period comparisons help leaders evaluate changes in outbound performance.
- **Expanded Recognition**
  Manually awarded badges remain visible when leaderboards are disabled and support additional product types.

User Experience and Navigation

- **Standardized Platform Navigation**
  The modern sidebar provides a consistent navigation experience across the platform.
- **Easier Agency Settings Navigation**
  Agency Settings navigation follows the section currently visible on the page.
- **Expanded Downline Visibility**
  Authorized users can view downline employees in User Management after access is claimed from an upline agency.
- **More Reliable Settings Management**
  Agency and custom-field changes can be saved without unrelated voice permissions blocking the update.

Licensing Policy and Automation

- **Safer Licensing Payment Retries**
  Licensing purchases can be completed after a declined payment without creating unnecessary repeat-charge risk.
- **Agency-Controlled Licensing**
  Agencies can disable licensing features based on their operational needs.
- **Carrier Appointment Reminders**
  Agencies receive reminders to confirm carrier appointments when licensed routing states are added.
- **More Reliable Licensing Alerts**
  Licensing alerts retain their read status when duplicate notifications occur.
- **Readable Payment Methods**
  Policy exports display recognizable payment methods, reducing the need to inspect policies individually.
- **Protected Shared Lead Lists**
  Shared lead lists remain connected when automations are edited, preserving suppression and do-not-call rules.
- **Clearer Transfer-Sale Attribution**
  Selling and servicing roles are represented more accurately within transfer-sale workflows.
- **Accurate Appointment Windows**
  Appointment booking windows use the correct timezone when validating availability.

Questions about these updates?

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

EnrollHere Product Demos

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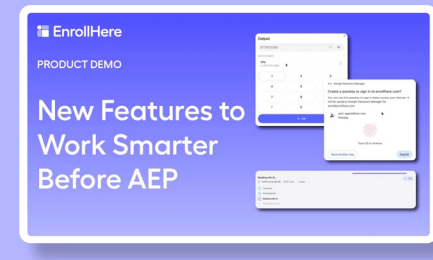
5 Dials to Turn Before Volume Hits

AEP begins Oct. 15. Is your agency ready? Our latest blog series highlights five essential EnrollHere settings and workflows to help agency owners and admins prepare for increased call volume, improve efficiency and keep operations running smoothly throughout AEP. Five days. Five dials. Set them now. Use them all season. Read the AEP Readiness Series



New Features to 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. Watch the video.



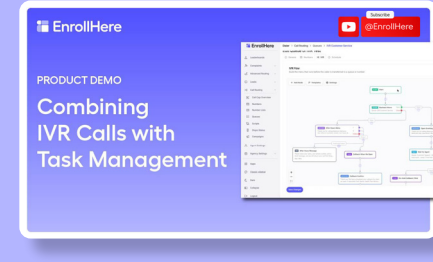
Lifetime Value Calculations and Projections

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. Watch the video.



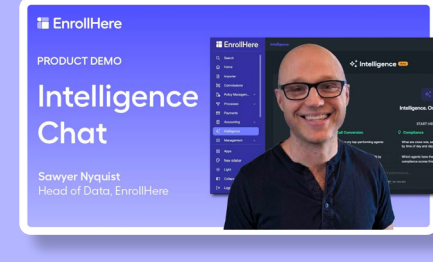
Combining IVR Calls with Task Management

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. Watch the video



Intelligence Chat

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. Watch the video.



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. Watch the video.

