EnrollHere

Sprint Updates

New platform enhancements designed to improve customer and policy management, strengthen operational oversight and deliver more actionable business intelligence.

October 12-16, 2026 | 28 New & Improved Features

FEATURED ENHANCEMENTS

7 Categories

At a Glance

This week's updates include:

- More accurate customer, policy and sales records
- Expanded geographic and licensed-agent routing
- Stronger outbound compliance safeguards
- Clearer performance, recognition and commission reporting
- More current Intelligence insights with human oversight

Customer and Policy Management

- **More Accurate Sales Entry**
  Agents can select the correct customer for each product at the end of a call, prefill applicant information and review existing policies, reducing incorrect associations and duplicate records.
- **Better Customer Context During Calls**
  Verified call details display customer records connected to the caller's phone number, helping agents recognize existing customers and policies.
- **Easier Policy Corrections**
  Agents can update a policy's product category and subcategory while keeping the associated information consistent.
- **Clearer Customer Ownership**
  Customer ownership remains aligned with lead ownership. Authorized staff can also reassign individual customers, including previously unowned records.
- **Customer Notes in Policy Details**
  Linked customer notes are available within policy details and remain connected to the customer profile, reducing navigation between records.
- **More Reliable Customer Navigation**
  Users can reach offscreen customer sections, including Tasks, without the interface returning to a previous tab.
- **Stronger Connections Between Policies & Calls**
  Policy submission dates help connect imported policies with relevant calls, giving authorized users additional supporting context.

Call Routing

- **Smoother Callback Handling**
  Available auto-dial agents remain ready when another agent claims a waiting callback, preventing unnecessary interruptions.
- **Expanded Geographic Targeting**
  Queue ZIP code lists can support up to 50,000 entries, with faster entry, duplicate removal and clearer upload feedback.
- **Licensing-Aligned Routing**
  Agency routing updates after license checks, helping eligible agents remain available for calls in the states where they are licensed.

Compliance & SMS Communications

- **Stronger Outbound Compliance Screening**
  Compliance screening applies to auto-dial and AI-dial workflows. Leads are held when screening fails or times out instead of being dialed without verification.
- **Controlled Scorecard Visibility**
  Supervisors can choose which scorecards agents can view. Hidden scorecards continue evaluating calls and remain available for supervisory review.
- **Consistent SMS Setup**
  Registration, campaign approval, phone-number setup and agent assignment follow a shared workflow across the Web and Dialer applications.

Questions about the latest updates?

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

See Page 2 for additional featured enhancements. ↓

Leaderboards Recognition & Reporting

- **More Trustworthy Call Totals**
  Inbound-call totals and connection-rate calculations align with Call Logs, providing a more consistent view of call activity.
- **Team-to-Agent Drilldowns**
  Managers can view individual agent results beneath team totals within tagged Call Analysis reports.
- **Flexible Sales Comparisons**
  Users can compare performance using disposition-based sales or owned-policy totals. Goals, displays and exports follow the selected source.
- **Better Award and Team Management**
  Administrators can remove an incorrectly assigned badge from one recipient without affecting others. Expanded team views, sorting and exports support additional performance comparisons.
- **Recognition Based on Current Performance**
  Rank-based badges can move to the next qualifying winner and update nightly, including support for tied leaders and days-led tracking.

Commissions

- **More Complete Commission Reporting**
  Improved search and selection across complete result sets support more accurate analysis, while duplicate carrier entries are removed from charts.
- **Readable Commission Exports**
  Commission-statement exports display recognizable account names instead of internal account identifiers.
- **Protected Agent Payments**
  Commission lines that cannot be allocated safely are sent for review instead of being processed without an agent payment
- **Historically Accurate Payouts**
  Historical payout calculations use the agency hierarchy in place at the end of the applicable cycle.
- **Reliable High-Volume Processing**
  Bulk commission updates and retries are handled more efficiently, reducing timeouts and conflicting updates.

Call Quality & Operational Visibility

- **Expanded Call Diagnostics**
  Connection-quality details, recording identification, playback and connection-failure information provide better evidence when investigating dead air or unsuccessful calls.
- **More Accurate Call Records**
  Call records more clearly distinguish inbound callers from agents and accurately classify calls answered after waiting in a queue.

Intelligence

- **Queue Recommendation Models**
  Intelligence Agent lets users access on-demand algorithm-based recommendation models for inbound queue/vendor prioritization based on performance.
- **Transcript Analytics in Intelligence Agent**
  Agencies can now ask complex and flexible questions about what's happening on calls, what consumers are saying, and how their agents are performing.

EnrollHere Product Demos

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AEP Has Started. It's Not Too Late to Turn These 5 Dials.

AEP is underway, but there's still time to optimize you EnrollHere platform for success. Our 5 Dials to Turn Before AEP guide walks you through essential settings, workflows and tools to improve efficiency, strengthen compliance and maximize performance. These improvements can be implemented at any time throughout AEP to keep your operations running at their best. → Explore the 5 Dials

