

Case Study

How Dominion Outsourcing Scaled Multi-State Compliance and Simplified Operations with CallShaper

www.callshaper.com





Client : **Dominion Outsourcing**
Contact : **Casey Thomas, Director of Operations**
Industry : Healthcare Support Services, Insurance Sales,
State-Based Programs
Use Cases : Inbound & Outbound Agent Campaigns,
State-Specific Routing, Licensed Agent Support
Key Features : Call Routing by License & State, Callback
Used : Scheduling, Disposition Notes, Embedded
Reporting



The Challenge

Dominion Outsourcing supports healthcare and government insurance programs across the U.S., including time-sensitive outreach for Medicare and ACA program enrollment.

With teams of licensed agents working across multiple states, they needed a dialer platform that could:

- Route leads by state license
- Track compliance metrics
- Simplify call notes and callback handling
- Scale easily without complex integrations

Most dialers they evaluated required third-party CRM add-ons, complicated routing logic, or developer-heavy setup.



The CallShaper Solution

Dominion turned to **CallShaper** to manage their multi-state operations from one flexible platform. Key wins included:

State-by-State Routing Logic

Custom call flows ensure agents only receive leads they're licensed to handle.

Built-In Agent Tools

CallShaper's native scheduling and note-taking eliminated the need for a third-party CRM.

Hands-On Support

When we needed help mapping state-specific logic, Zach and Tia were right there with us.

Agent-Friendly Interface

Easy to learn, quick to deploy, and powerful enough for complex campaigns.

All-in-One Simplicity

With embedded reporting, lead history, and call controls, Dominion could manage everything in one place.

Results & Business Impact

"We've used a lot of dialers over the years, but CallShaper stands out. It's simple, flexible, and the support is second to none."



Improved Compliance

Licensed agents are only served leads for states they're approved to handle



Faster Onboarding

Minimal training time required to get new agents up and running



Reduced Overhead

No extra CRM licensing or middleware needed



Streamlined Operations

Callback queues and notes are managed natively within the platform

Next Steps: Dominion continues to expand its use of CallShaper across new state contracts and lines of business.