



blueButler Voice Signature

- Break all sales records
- Incredible time savings and efficiencies
- Wonderful experience for agency staff and customers
- The blueButler Platform ensures all agency phone calls are captured, securely organized for content and displayed for immediate next steps

What is Voice Signature

- A blueButler Voice Signature serves as legal proof of a transaction. This includes actions like accepting insurance applications, giving consent, or providing necessary information for policy requirements. These transactions are automatically documented in both the blueButler database and the Agency Management System for secure permanent storage and easy access.

Who uses blueButler Voice Signature

- Voice Signatures are very quickly picking up steam and are now used by thousands of insurance professionals across North America including many of the largest agencies and brokerages.

Simplifying Voice Signature

- “Voice Signatures” are a simple way to lock down insurance business opportunities in the moment the opportunity is ready to be locked down.
- Say goodbye to the time-consuming task of chasing e-signatures / written signatures!
- With blueButler Voice Signatures, your staff will save valuable time, streamlining workflows and increasing productivity.
- Experience the natural and effective use of Voice Signatures that can put your firm on track to break all sales records, just like blueButler Voice Signatures have done for many other agencies!!

How to get started with Voice Signature

Step 1: Secure Voice Recording Platform



Step 2: Choose your Voice-binding Scripts



Step 3: Confirm with your carriers



Step 1: Secure Voice Recording System

What you need to use Voice Signature	blueButler Agency Platform	VoIP Personal Call Recording
Secure and tamper-proof call recordings	YES	NO
Audit trail connecting all phone devices to a database for accountability of every call	YES	NO
Long term storage (7-10 years)	YES	Typically, only 30-90 days storage (not adequate)
Guided and carrier approved scripts / checklist to bind coverage	YES	NO

Step 2: Choose your Voice-binding scripts

Examples of when agencies use Voice Signature:

- Payment Authorization (Via Direct Carrier Portal / Agency Pay)
- Auto Application
- Home Application
- Accident Benefits
- Water Damage
- Privacy Consent
- Credit History Consent
- Marketing Consent
- Cancellations

Step 3 Confirm with your carriers

- Most carriers are aware of Voice Signatures and will readily accept them, however because the technology is relatively new, it is advisable to check with your carriers

Example of a blueButler Customer Voice Signature Script

To confirm, I am speaking with _____.

You are applying for automobile insurance based on the personal information you provided.

In processing your application we need to collect, use, and disclose personal information such as, but not limited to, driving records, auto insurance policy and claims history. This is for the purpose of assessing risk, investigating and settling claims, and preventing fraud.

Do you give your consent for us to collect, use and disclose your personal information?

Are you able to confirm that you have already obtained the consent from all other drivers listed on the Application to allow us to collect, use and disclose their personal information?

If the answer is "No": Will you obtain the consent of the other listed drivers?

Voice Signature Recap

blueButler uniquely puts your agency on a path to
break all sales records TODAY!

blueButler offers real-time checklists and scripts specifically designed for phone-based workflows. This creates new possibilities for attracting potential business opportunities to lock down Voice Signatures for:

- Annual Renewals conducted over the phone
- Coverage Reviews and Enquiries
- Processing New Applications
- Realtime Cross-sells and Upsells

Take care of over the phone cross sells / upsells with Voice Signature

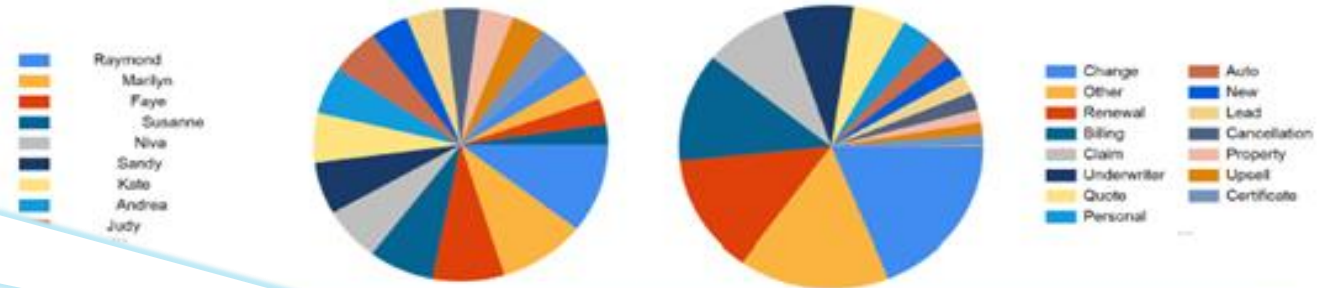
Are Raymond and Marilyn the only ones using the upsell scripts? (click to listen)

Why isn't everyone successful using the campaign lead scripts? (click to listen)

Tagged Calls By Employee Report

Calls Tagged / Employee

Calls / Tag



	Change	Other	Renewal	Billing	Claim	Underwriter	Quote	Personal	Auto	New	Lead	Cancellation	Priority	Upsell	Certificate	Application Confirmed	Telematics	Total Calls
Raymond	146	65	101	67	53	45	25	20	5	1	0	27	1	21	0	0	0	448
Marilyn	112	29	63	36	46	93	12	2	0	0	19	14	0	37	0	0	4	409
Faye	106	10	28	42	57	51	33	7	0	4	7	9	0	0	2	0	0	305
Susanne	39	64	37	38	34	26	16	15	15	0	12	5	2	4	0	0	5	272
Niva	37	70	18	23	12	1	4	77	0	0	0	1	0	0	19	0	0	262
Sandy	28	82	7	51	26	18	5	26	0	0	0	8	0	0	0	0	0	250
Kate	51	27	41	34	25	26	17	4	60	0	1	12	34	3	0	0	0	237
Andrea																		

"Securing Transactions with Voice Signatures: Actual Report from a Happy blueButler Customer"!

Call Tags identify calls of interest to management

1,887 customers experienced the once-and-done audio signature process!

How much time and money have you saved not having to chase paper.

Tagged Calls By Employee Report

	Change	Other	Renewal	Billing	Claim	Underwriter	Quote	Personal	Auto	New	Lead	Cancellation	Property	Upsell	Certificate	Application Confirmed	Telematics	Total Calls
Judy	69	61	42	27	8	3	13	5	0	0	2	0	0	0	0	0	0	230
Karen	65	2	41	31	27	0	1	0	0	10	0	2	0	0	0	0	0	178
Linda	40	28	43	30	32	1	2	0	0	1	0	2	0	0	0	0	0	176
i, Cathy	22	24	38	25	30	12	12	0	0	1	1	2	0	0	0	0	1	165
i, Sharon	36	49	24	20	10	0	0	6	0	16	0	0	0	0	0	0	0	161
Karen	51	2	31	35	16	0	12	4	0	4	0	1	0	0	0	1	0	157
, Ralph	46	1	25	37	17	0	8	0	0	9	0	6	0	0	0	0	0	147
Sandy	5	0	4	7	0	18	31	0	45	58	57	0	38	0	0	4	0	141
Kurtis	27	0	40	11	9	21	11	0	0	2	0	1	0	0	17	0	0	136
, Duy	3	44	27	20	5	22	50	0	0	0	2	4	0	0	0	4	0	129
Adriana	11	11	35	24	11	5	3	1	0	0	0	3	0	0	0	0	0	103
	939	797	671	618	454	371	277	169	134	124	108	101	75	65	40	20	11	4241

Voice Signature ROI and the blueButler Platform

- blueButler Voice Signature is a time saver
- 10-20 minutes saved per required signature just in “chase-time”
- In the displayed Customer Content Report in this slide presentation, Voice Signatures were used approx. 1800 instances in one month for a group of 25 staff
- Equates to approximately 600 hours per month in saved chase time
- A loaded staff cost of \$28.00 per hour – this equates to \$16,800 monthly in labor cost.
- These time savings allow you to direct staff to engage in more productive agency activity

INCREMENTAL REVENUE:

1. Get the business off the street when the customer calls from the car dealership or the urgent mortgage closing – opportunities you close that others can't without Voice Signatures
2. blueButler's platform of phone device audit trails and database, captures business on every call anytime anywhere regardless of phone device - and blueButler tracks your new business!
3. blueButler Platform Realtime Scripts and Checklist talking points promote numerous new cross sells, upsells and lead referrals that are booked right away with Voice Signatures

Legal Requirements of Voice Signature

Acceptance of insurance Applications; Acknowledgements; Consents and Confirmations need not be in writing if the Three “I”s are present:

- - Identity of the parties to the transaction – is it clear who the parties are
- - Intention to contract – do the parties willingly agree to the item
- - Integrity of the system and process – is the process and information secure

The blueButler Platform ensures secure and controlled voice signature processes for agency communications by configuring all relevant devices within its system. This centralizes communications under agency management, as opposed to individual staff control. Key security features include:

- - Secure storage of tamper-proof call recordings in the database.
- - Audit Trails linking phone devices to the secure blueButler database.
- - Content Tagging system for organizing and presenting workflow content.
- - Integration of Audit Trails with Agency Management to verify Activity Creation status and receive alerts for any discrepancies.

If you would like to learn more on Voice Signatures or any other feature in blueButler's Award-winning Platform, contact us or book a demo.

www.bluec802.com

sales@bluec802.com

1-877-730-2583