



blueButler for Applied Epic Work-at-Home Application extends across your organization no matter where your staff are located.

blueButler for Applied Epic is a must have for any agency at any time, in any circumstance but it is also the premier tool for managing agency business in a Work-at-Home Environment.

The Work-at-Home Application provides:

- Staff self-accountability
- Management oversight and insight, “as if management were present with staff”
- Collaboration among staff and management as if you never left the office.

Predominant Feature Value - Keys:

Enhances Customer Experience (“ECE”)

Drives Revenue (“REV”)

Drives Productivity / Efficiency (“PE”)

Automates Errors and Omissions Protection (“E&O”)



FEATURES

VALUE KEY (ECE – REV – PE - E&O)

Daily Call Activity Manager

- Automatically records and embeds all phone calls and for all Users and Management, displays phone calls like Outlook™ displays email **E&O PE**
- Automatic visual display of every call with meta-data and playback buttons as soon as the call is complete **PE ECE**
- Visual display of the call content and whether or not Activity in Epic was or was not created for each call **PE E&O**
- Display of Number of Calls by staff and by call content
- Sort calls by customer / staff / phone number used / subject / Content Tag / Call Duration / Other **PE ECE**
- Click “play” on any call to ensure best practices are followed
- Function keys at your figure tips to playback or email/share a recording as required for collaboration, email and track leads **ECE REV PE E&O**
- “Click to Call” – just click on the number on your screen and blueButler will make the call from your desk phone **PE**

Automated blueButler Screens and Epic Client Screen Pop

At the start of every phone call, a “Window into Epic” opens automatically on Users’ Screen with:

- Summary Client and Client Policy Information **ECE PE**
 - Recent telephone call history (who, what, when) **ECE PE**
 - Client Servicing Team contacts **ECE PE**
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FEATURES	VALUE KEY (ECE – REV – PE - E&O)
On-Screen Colour-coded guides	<ul style="list-style-type: none"> For key Disclosures, Upsells, and Cross Sells for each workflow and your Lead Campaign messages E&O ECE REV PE
Real-time Access to carrier portals	<ul style="list-style-type: none"> Including PCI compliant credit card payment process ECE REV PE E&O
Automated, embedded call recording	<ul style="list-style-type: none"> Recordings automatically embedded in blueButler PE E&O Link recordings into Epic with a “click” PE E&O Playable from Epic client file with a “click” PE E&O
Automated phone call Activity Creation	<ul style="list-style-type: none"> Just click “Save” to push call detail logging, checklist information, recorded call link, and Activity Note into Epic PE E&O Create a New Activity or add the call to an Open Activity – set the code, date & person for the Activity PE E&O
Real-time Call Tags	<ul style="list-style-type: none"> Visually identify calls by their content PE ECE REV E&O
Call Content Management Reports	<ul style="list-style-type: none"> Automated Call Content reports arrive in your inbox on a schedule you choose REV PE E&O Reports show metrics by content for each staff for any selected period of time REV PE E&O Select staff content metric, “click” and listen to a few of the recorded calls behind each metric to achieve insights into your operations ECE REV PE E&O



blueButler integrates Applied Epic into your VoIP system whether you are in the cloud or onsite

The image illustrates the integration of blueButler and Applied Epic into a VoIP system. It features two computer monitors: the top one is labeled 'blueButler' and shows a software interface with various fields and buttons; the bottom one is labeled 'Applied Epic' and displays a data table with columns for 'Name', 'Address', 'City', 'State', and 'Zip'. To the right of the monitors is a VoIP phone with a dashed blue triangle above it, and a photograph of a woman in a blue shirt looking at a laptop screen.