

**The first phone application designed for
Insurance Agencies**



blueButler

includes automated & linked Call Recording

blueC 






























blueButler

**blueButler Features
that drive phone call
work flows,
compliance and
management oversight**

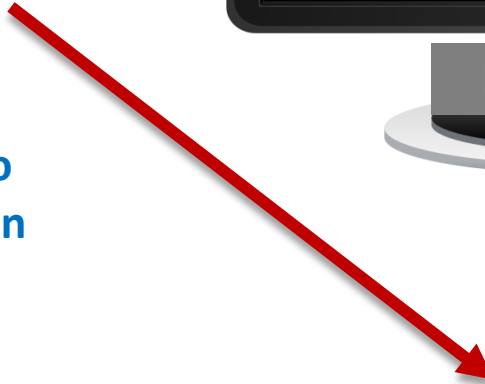
- blueButler Screen Pop
- Recent Call History Display
- Automated Call Meta-data Capture
- Customized Real Time Checklists
- Call Content Tagging
- Automated MP3 Call Recording File
- Click to Call

- Managers view of Staff Phone Call Activity
- “Google-like” Phone Call Search
- Drill Down Reports with playback ability

blueButler Daily Call Activity Manager

Play	Start Time	In/Out	Formatted Digits	Duration	Name	Shared	Linked	Customer #	Policy #	Subject	Tags
 	2/22/2017 4:37:07 PM	Out	1-555-555-1234	00:00:49	Kristin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CCRACLY01			
 	2/22/2017 4:36:52 PM	Out	1-555-555-1234	00:11:10	Beverly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ATHBOCH01			Quote
 	2/22/2017 4:32:48 PM	Out	1-555-555-1234	00:05:43	Anna	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ILMORLI01			
 	2/22/2017 4:30:03 PM	In	1-555-555-1234	00:01:08	Angie	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AVENJO001			
 	2/22/2017 4:29:35 PM	Out	1-555-555-1234	00:00:33	Carol	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OULINMA01			Cancel
 	2/22/2017 4:28:30 PM	In	1-555-555-1234	00:02:15	Arianne	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EARCEDA02			
 	2/22/2017 4:28:29 PM	Out	1-555-555-1234	00:02:58	Colleen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LENSTA-01			
 	2/22/2017 4:28:12 PM	Out	1-555-555-1234	00:01:07	Shane	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ARRCH0002			Ext-voicemail
 	2/22/2017 4:27:18 PM	Out	1-555-555-1234	00:06:52	Kristin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CCRACLY01			
 	2/22/2017 4:26:46 PM	Out	1-555-555-1234	00:08:38	Heidi	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OTELHER01			Quote, Enquiry
 	2/22/2017 4:26:06 PM	Out	1-555-555-1234	00:12:23	Vicki	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RAYAN0001			
 	2/22/2017 4:25:06 PM	Out	1-555-555-1234	00:01:30	Marie	<input type="checkbox"/>	<input type="checkbox"/>				Policy Change
 	2/22/2017 4:24:09 PM	Out	1-555-555-1234	00:04:26	Robyn	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BMECH-01			
 	2/22/2017 4:23:26 PM	Out	1-555-555-1234	00:00:49	Kristin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CKETBR01			
 	2/22/2017 4:23:17 PM	In	1-555-555-1234	00:05:25	Tracey	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DEVALJA01			
 	2/22/2017 4:22:15 PM	Out	1-555-555-1234	00:01:48	Heather	<input type="checkbox"/>	<input type="checkbox"/>				
 	2/22/2017 4:22:09 PM	Out	1-555-555-1234	00:09:28	Lucille	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UCILLE01			Renewal
 	2/22/2017 4:21:54 PM	In	1-555-555-1234	00:03:20	Shylia	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IMONLI001			
 	2/22/2017 4:20:44 PM	Out	1-555-555-1234	00:00:41	Kristy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AGGLUIN01			Billing
 	2/22/2017 4:20:21 PM	Out	1-555-555-1234	00:02:10	Brandon	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ARRELQU01			Underwriter
 	2/22/2017 4:19:20 PM	Out	1-555-555-1234	00:00:48	Irene	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IACEKDA01			
 	2/22/2017 4:18:55 PM	In	1-555-555-1234	00:09:47	Amy	<input type="checkbox"/>	<input type="checkbox"/>				Personal

How blueButler for AMS/BMS works



Whether calls go through reception



blueButler connects your phone activity (phone call data, recording and call content) into your AMS/BMS Client File

How blueButler for AMS/BMS works



blueButler knows which phone is connected to which desk computer



blueButler connects your phone activity (phone call data, recording and call content) into your AMS/BMS Client File



Scripts & Checklists

The screenshot displays the blueButler application window. At the top, a header bar shows call information: "303 : Jones, Jennifer (Completed) 1/31/2017 10:01:16 AM In : 204-555-0100 Duration: 00:00:16 Held: 00:00:00". Below this is a search bar containing "204-555-0100" and a search icon. On the right side of the header, there are buttons for "Checklists", "Close", and "Current Call", along with the text "201502280000000535 | 303SMain".

The main interface is divided into two primary sections. On the left is an "Information" panel with fields for "Customer #", "Policy #", "Subject", and "Comments". It also includes checkboxes for "Important" and "Bookmark", and a "Calendar" button. On the right is a "Scripts & Checklists" panel. It features a navigation menu with "Start" selected, and a list of other tags: "Policy Change", "Policy Renewal", "New Policy", "Cancel", "Uber", "Wrap-up", "Credit Card", "Definitions", "Commercial", and "Sample". The main content area of this panel contains a checklist titled "Check client contact info:" with three bullet points: "Verify Caller's Name", "Verify Insured's Name (if different)", and "Make sure caller has permission to access Insured's information". It also includes a note: "If they ask for a specific person, ask 'May I ask what this is in regards to?'", a question: "What is your preferred way for us to contact you? We can call you, email you or text you.", and a campaign message: "Current Campaign: We have a referral program where we have a monthly draw for anyone who refers a new client to our firm. Do you know of anyone who may be interested in our services?".

Below the main sections is a "Call Content Tags" bar with buttons for "Audio Signature", "Billing", "Cancel (Price)", "Cancel (Services)", "Cancellation", "CC#", "Change", "Claim", "Commercial", "Cross-Sell", "Info", "Lead", "New", "Other", "Personal", "Prospect", "Quote", "Referral", "Renewal", "Uber", "Underwriter", and "Upsell". At the bottom, there is a "Recent Activity" section and an "Audio Player" with play, pause, and stop buttons, a progress bar, and a "Speed" control.

Phone call details

Call Content Tags

Recent Call History

Audio Player

blueButler Scripts – One Click access to Documents, Portals, and Emails with Attachments

Canadian Therapy Professional And General Liability Insurance

WARNING
 If the Applicant receives a claim or becomes aware of a circumstance that may give rise to a claim, the Applicant must contact Holman Insurance Brokers Ltd. immediately to ensure that the claim notification provisions under the policy are adhered to. Failure to do so could prejudice the Applicant's ability to claim under the Applicant's insurance policy.

If the Applicant is a new client to Holman Insurance Brokers Ltd. and the Applicant's previous liability policy was not on a "claims made" basis with the same "retro-active date" to that provided under this insurance application please call Holman Insurance Brokers Ltd. for advice as the Applicant may be exposed to a gap in cover. It is the responsibility of the Applicant to understand the type of insurance they are applying for.

Personal Information of The Applicant (You) - Please provide the following specific information:

Any Applicant who has qualified overseas shall also have to be individually approved prior to cover being authorized by Insurers.

1. Full Name of Applicant:

First Name	Initial	Last Name
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2a. Address:

Street Address		
City	Province	Postal Code

b. Telephone Number:

Business #	Cell #
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c. Email Address:

	Fax #
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3. Relevant Canadian Qualifications – PLEASE ATTACH CERTIFICATES for new applicants and new certifications

Name of Association, School or Centre	Course Title	Dates MM/DD/YY

Relevant Non-Canadian Qualifications - PLEASE ATTACH CERTIFICATES for new applicants and new certifications

Name of Association, School or Centre	Course Title	Country	Dates MM/DD/YY

Any Applicant who has Non-Canadian qualifications will have to be individually approved prior to cover being authorized by Insurers.

Canadian Therapy Application Form V5.3

economical MENU

PAY BY CREDIT CARD

* Required

Account Information

* Account Number (7 or 9 numeric characters)

 ?

Therapy Testing - Message (HTML)

This message has not been sent.

To: _____

From: _____

Subject: Therapy

Attached: Therapy App V53.pdf

We are testing out a .gml file being saved, and how you can access it to send it out to a new client that needs a document.

Thanks,
 Rob Walker
 Manager of Support & Professional Services

blueC 802 Inc | www.bluec802.com
 Intelligent Digital Recording & Call Content Management
 Office: (519) 880-0741 x5430
 Direct Number: 226-781-0434

Support Contact information:
support@bluec802.com
 519-880-0741 (Press 2 for Support)

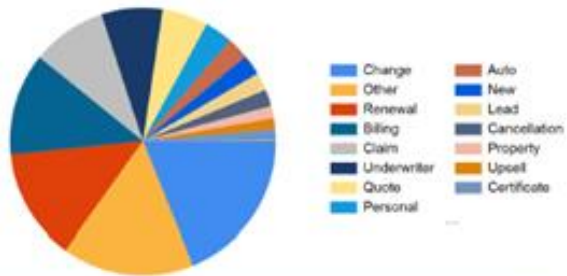
Call Tags identify calls of interest to management

Tagged Calls By Employee Report

Calls Tagged / Employee



Calls / Tag



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)

	Change	Other	Renewal	Billing	Claim	Underwriter	Quote	Personal	Auto	New	Lead	Cancellation	Property	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	106	63	63	36	46	93	12	2	0	0	19	14	0	37	0	0	4	409
Faye	94	43	28	68	38	23	22	0	0	18	7	4	0	0	2	11	1	335
Susanne	106	10	28	42	57	51	33	7	0	4	7	9	0	0	2	0	0	305
Niva	39	64	37	38	34	26	16	15	15	0	12	5	2	4	0	0	5	272
Sandy	37	70	18	23	12	1	4	77	0	0	0	1	0	0	19	0	0	262
Kate	28	82	7	51	26	18	5	26	0	0	0	8	0	0	0	0	0	250
Andrea	51	27	41	34	25	26	17	4	60	0	1	12	34	3	0	0	0	237

Click on any cell to drill-down to the call details

Click to play a
recorded call
directly from
the PDF report



Start Time	Number	Duration	Extension	User Name
		Calls:		5
		Total Duration:		00:04:45
		Average Duration:		00:00:57
▶ 00:23	In 7095556969	00:00:50	303	Jones, Jennifer
Subject:	New home policy.			
Comments:	The memo you sent me was received.			
Tags:	Life Lead			
▶ 01:32	Out 913065550110	00:01:00	303	Jones, Jennifer
Subject:	Auto policy change.			
Comments:	Adding home insurance.			
Tags:	Life Lead			
▶ 06:37	Out 913065551326	00:01:02	303	Jones, Jennifer
02-529-98	2382-47			
Comments:	The memo you sent me was received.			
Tags:	Life Lead			
▶ 07:07	Out 916135550170	00:00:52	303	Jones, Jennifer
* 01-475-47				
Tags:	Life Lead			

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
Cathy	22	24	38	25	30	12	12	0	0	1	1	2	0	0	0	0	1	165
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



blueButler

**blueButler addresses
the top issues facing
Insurance Agencies**

- 1. Customer retention**
- 2. Revenue growth**
- 3. Competition from direct and on-line sellers**
- 4. Errors and Omissions**
- 5. Reducing expenses & managing staff productivity**

**AMS / BMS
system**



blueButler



**VoIP / PBX
(phone system)**



**Call Recording
Phone Call Audit Trail**

**Screen Pops
Scripts / checklists
Content Tagging
Audio Signatures
Playback & Reporting**



**Producers
CSRs
Management**

