Deliver an outstanding customer experience while automating Errors and Omissions Protection

blueButler

includes automated & linked Call Recording

blueC

blueButler
for AMS360

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

- blueButler Screen Pop
- AMS360 Screen Pop
- Recent Call History Display
- Automated Call Meta-data Capture
- Customized Real Time Checklists
- Call Content Tagging
- Automated Activity / Suspense Creation
- Automated Link to MP3 Call Recording File
- Daily Call Activity Manager
- 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	☑	☑	CCRACLY01		called about truck	
▶ 🖥 📇 📇	2/22/2017 4:36:52 PM	Out	1-555-555-1234	00:11:10	Beverly	☑	☑	ATHBOCH01		2016 Ford & delete skidoo inquiry	Quote
▶ 🖥 📇 📇	2/22/2017 4:32:48 PM	Out	1-555-555-1234	00:05:43	Anna	☑	☑	ILMORLI01		care call	
▶ 🖥 📇 📇	2/22/2017 4:30:03 PM	In	1-555-555-1234	00:01:08	Angie	☑	☑	AVENJO001		client called back re Final Notice	
▶ 🖥 📇 📇	2/22/2017 4:29:35 PM	Out	1-555-555-1234	00:00:33	Carol	☑	☑	OULINMA01		Registered Letter eff03/12/2017	Cancel
▶ 🖥 📇 📇	2/22/2017 4:28:30 PM	In	1-555-555-1234	00:02:15	Arianne	☑	☑	EARCEDA02		Loss Notice Entered	
▶ 🖥 📇 📇	2/22/2017 4:28:29 PM	Out	1-555-555-1234	00:02:58	Colleen	☑	☑	LENSTA-01	2744	requested photos	
▶ 🖥 📇 📇	2/22/2017 4:28:12 PM	Out	1-555-555-1234	00:01:07	Shane	☑	☑	ARRCH0002	218505	L/M with Dealer for finance details - recd?	Ext-voicemail
▶ 🖥 📇 📇	2/22/2017 4:27:18 PM	Out	1-555-555-1234	00:06:52	Kristin	☑	☑	CCRACLY01		called about truck	
▶ 🖥 📇 📇	2/22/2017 4:26:46 PM	Out	1-555-555-1234	00:08:38	Heidi	☑	☑	OTELHER01		called for auto quote, referred by his parents. Emailed him a auto quote form	Quote, Enquiry
▶ 🖥 📇 📇	2/22/2017 4:26:06 PM	Out	1-555-555-1234	00:12:23	Vicki	☑	☑	RAYAN0001		Added attachment Email from advising insured wants me to shop	
▶ 🖥 📇 📇	2/22/2017 4:25:06 PM	Out	1-555-555-1234	00:01:30	Marie	☐	☐				Policy Change
▶ 🖥 📇 📇	2/22/2017 4:24:09 PM	Out	1-555-555-1234	00:04:26	Robyn	☑	☑	BMECH-01	R8583	Returned call	
▶ 🖥 📇 📇	2/22/2017 4:23:26 PM	Out	1-555-555-1234	00:00:49	Kristin	☑	☑	OCKETBR01		o/s balance	
▶ 🖥 📇 📇	2/22/2017 4:23:17 PM	In	1-555-555-1234	00:05:25	Tracey	☑	☑	DEYALIA01		called in re: renewal increase	
▶ 🖥 📇 📇	2/22/2017 4:22:15 PM	Out	1-555-555-1234	00:01:48	Heather	☐	☐				
▶ 🖥 📇 📇	2/22/2017 4:22:09 PM	Out	1-555-555-1234	00:09:28	Lucille	☑	☑	UCILLLE01	18017	Download Renewal-Review File/Care Call	Renewal
▶ 🖥 📇 📇	2/22/2017 4:21:54 PM	In	1-555-555-1234	00:03:20	Shylia	☑	☑	IMONLI001		called in reg: possible claim	
▶ 🖥 📇 📇	2/22/2017 4:20:44 PM	Out	1-555-555-1234	00:00:41	Kristy	☑	☑	AGGLUIN01			Billing
▶ 🖥 📇 📇	2/22/2017 4:20:21 PM	Out	1-555-555-1234	00:02:10	Brandon	☑	☑	ARRELQU01	71284	Spoke w/ Jessie	Underwriter
▶ 🖥 📇 📇	2/22/2017 4:19:20 PM	Out	1-555-555-1234	00:00:48	Irene	☑	☑	IACEKDA01	3563	Loss Notice Entered	
▶ 🖥 📇 📇	2/22/2017 4:18:55 PM	In	1-555-555-1234	00:09:47	Amy	☐	☐				Personal

How blueButler for AMS360 works
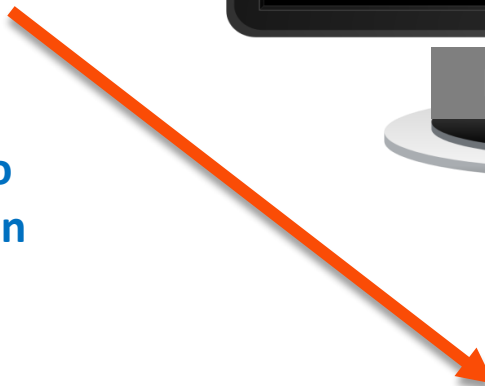
Whether calls go through reception
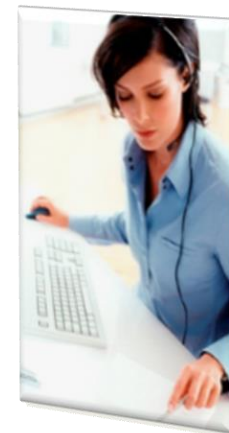
blueButler

blueButler connects your phone activity (phone call data, recording and call content) into your AMS360 Client File

How blueButler for AMS360 works

blueButler knows which phone is connected to which desk computer

blueButler

blueButler connects your phone activity (phone call data, recording and call content) into your AMS360 Client File

Phone call details

AMS Client data
Activity creation
Open A/R items

Screen Pop

Scripts & Checklists

Call Content Tags

Call History

Audio Player

blueButler

309 : Fowler, Rob (Completed)   1/31/2017 10:01:48 AM   Out   :   9-1-778-555-1525   Duration: 00:00:18   Held: 00:00:00   Checklists   Close   Current Call

9-1-778-555-1525   Include InActive   201502280000000538 |

Information   DEMO

Bob Webster

Customer
Number: RICHARDSON
Account Name: Richardson Industries
First Name: Bob
Last Name: Webster
Email: bob.webster@richardson.com
Address: 24 McIntyre Place
                 Kitchener, ON
Phone: 5145550189

Confirm   Pop

RICH-AUTO   RICH-HOME

Policy

Type: Home
Term: 1/29/2017 12:00:00 AM - 1/29/2018 12:00:00 AM

Confirm

Start   Policy Change   Policy Renewal   New Policy   Cancel   Uber   Wrap-up   Definitions

START

Check client contact info:

 - email
 - home and mobile numbers
 - address
 - contact name(s)

Be sure to thank them for their business!

Audio Signature   Billing   Cancel (Price)   Cancel (Services)   Cancellation   Change   Claim   Cross-Sell   Lead   New   NPCF   Other   Personal   Price Review   Prospect   Referral   Renewal   Service   Uber   Underwriter   Upsell

Play	Formatted Digits	Start Time	Duration	Name	Tags	Customer #	Policy #	Customer Type	Subject	Comments
	9-1-778-555-1525	1/31/2017 10:01:48 AM	00:00:18	Fowler, Rob	Change, Upsell	RICHARDSON	RICH-HOME			

Recent Activity

00:00   00:00   Not Playing

Speed

Create an activity in AMS360 that links to this call record and recording

Use the Copy button to append the checklist data to your activity notes

Save the activity record in AMS360

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

AMS360 Screen Pop
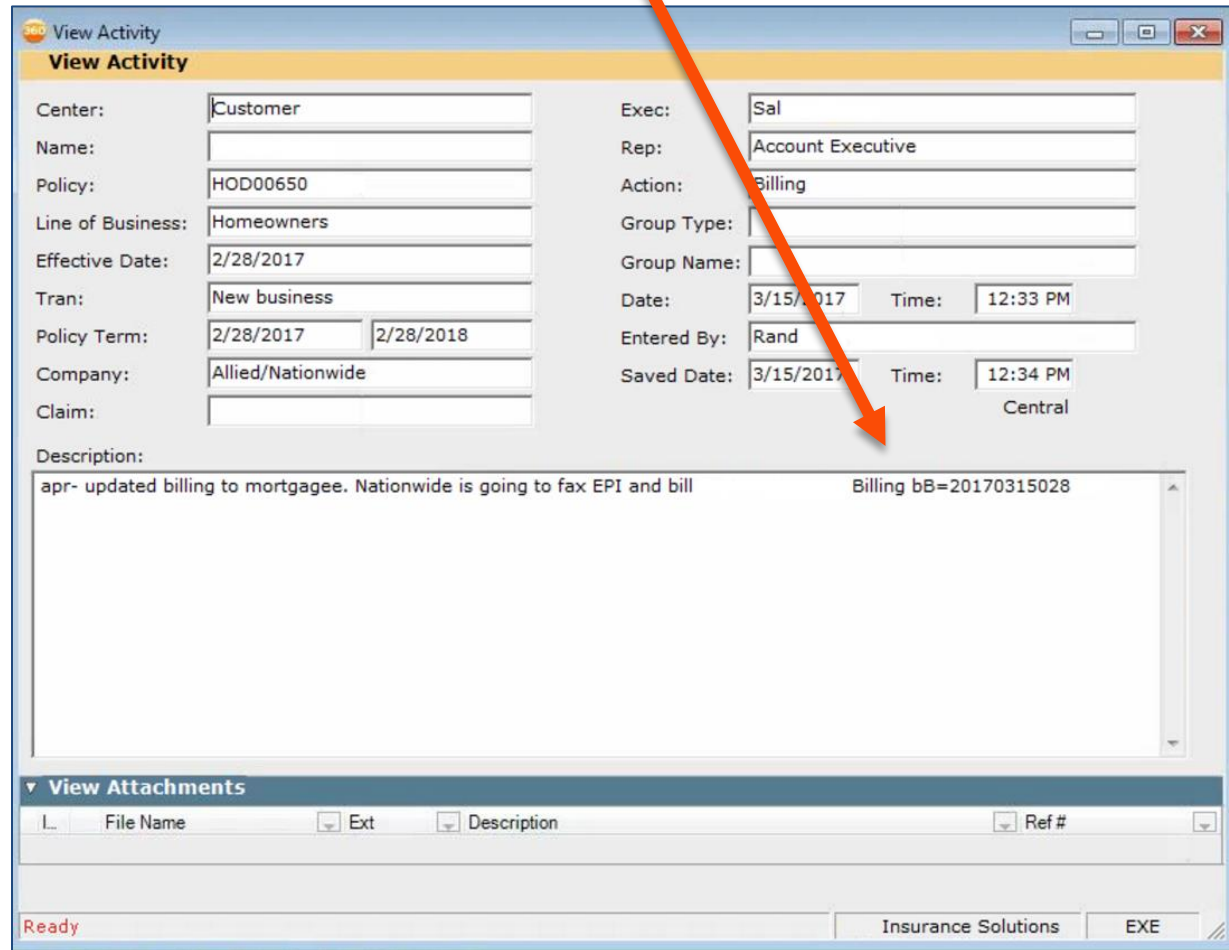
The call details are stored in the Activity with a link to the recording

View Activity

View Activity

Center:	Customer	Exec:	Sal
Name:		Rep:	Account Executive
Policy:	HOD00650	Action:	Billing
Line of Business:	Homeowners	Group Type:	
Effective Date:	2/28/2017	Group Name:	
Tran:	New business	Date: 3/15/2017 Time:	12:33 PM
Policy Term:	2/28/2017 2/28/2018	Entered By:	Rand
Company:	Allied/Nationwide	Saved Date: 3/15/2017 Time:	12:34 PM
Claim:			Central

Description:

apr- updated billing to mortgagee. Nationwide is going to fax EPI and bill   Billing bB=20170315028

▼ **View Attachments**

I..	File Name	Ext	Description	Ref #

Ready   Insurance Solutions   EXE

Call Tags identify calls of interest to management

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)

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

Tagged Calls By Employee Report

Calls Tagged / Employee
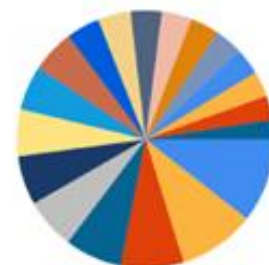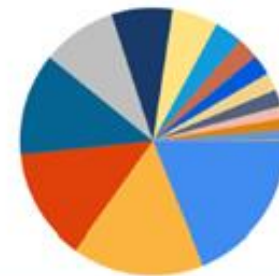
Raymond
Marilyn
Faye
Susanne
Niva
Sandy
Kate
Andrea
Judy

Calls / Tag

Change / Auto
Other / New
Renewal / Lead
Billing / Cancellation
Claim / Property
Underwriter / Upsell
Quote / Certificate
Personal

	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
		63	36	46	93	12	2	0	0	19	14	0	37	0	0	4	409
Faye	94	45	26	66	38	29	22		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

Tagged Calls By Employee   Page 2 of 3   10/7/2014 12:02:03 PM

Life Lead detail report.pdf - Adobe Reader

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

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	0	2	4	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

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

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

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