

**Deliver an outstanding customer experience while
automating Errors and Omissions Protection**



blueButler

includes automated & linked Call Recording

blueC 















































blueButler
for AMS360

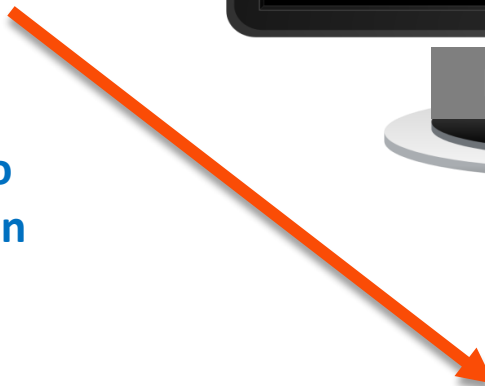
**blueButler Features
that drive phone call
work flows,
compliance and
management oversight**

- 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

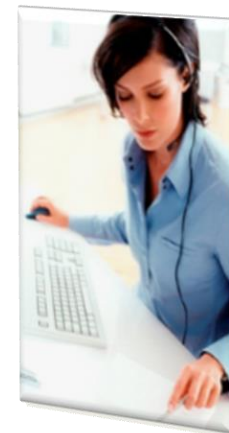
blueButler Daily Call Activity Manager

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CCRACLY01		called about truck	
 	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		2016 Ford & delete skidoo inquiry	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		care call	
 	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		client called back re Final Notice	
 	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		Registered Letter eff03/12/2017	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		Loss Notice Entered	
 	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	2744	requested photos	
 	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	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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CCRACLY01		called about truck	
 	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		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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	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	<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	R8583	Returned call	
 	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		o/s balance	
 	2/22/2017 4:23:17 PM	In	1-555-555-1234	00:05:25	Tracey	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DEYALIA01		called in re: renewal increase	
 	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	18017	Download Renewal-Review File/Care Call	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"/>	IMONU001		called in reg: possible claim	
 	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	71284	Spoke w/ Jessie	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	3563	Loss Notice Entered	
 	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 AMS360 works



Whether calls go
through reception



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 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

9-1-778-555-1525

Checklists Close Current Call

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

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

Save the activity record in AMS360

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

The screenshot displays the blueButler software interface. At the top, a header bar shows call details: "309 : Fowler, Rob (Completed) 1/31/2017 10:01:48 AM Out : 1-778-555-1525 Duration: 00:00:18 Held: 00:00:00". Below this, a search bar contains "778-555-1525" and a checkbox for "Include InActive". On the right, buttons for "Scripts", "Close", and "Current Call" are visible, along with a call ID "201502280000000538" and a status "309 Main".

The main interface is divided into two panels. The left panel, titled "Information | DEMO | Activity", shows a dropdown menu for "Activity Code" set to "Phone Call". Below it, the "Activity" section displays the title "Sewer Back Up and Overland Water" followed by a list of questions: "Connected to municipal sewer system or septic tank?: Yes", "Is there Back water valve (professionally installed, date installed?): Yes", "Is there Sump pump (Battery, generator, water powered back up?): No", "Is there Downspouts connected directly to your weeping tiles or sewer drain?: Yes", "Any basement flooding or water damage in the past five years?: Yes", and "Last year water damage in basement from window well. Cover installed and". A "Save" button is at the bottom right of this section.

The right panel, titled "Home | DEMO | Overland Water", shows a "Copy" button at the top right. Below it, the section "Sewer Back Up and Overland Water" contains a checklist of questions with radio button options for "Yes" or "No": "Connected to municipal sewer system or septic tank?", "Is there Back water valve (professionally installed, date installed)?", "Is there Sump pump (Battery, generator, water powered back up)?", "Is there Downspouts connected directly to your weeping tiles or sewer drain?", "Any basement flooding or water damage in the past five years?", "If yes, date of loss and amount of damage and any mitigation measures taken to prevent future damage?", "Last year water damage in basement from window well. Cover installed and caulked.", "Reverse sloping driveway or below grade garage", and "Property within 100m of a river or other flowing body of water".

At the bottom of the interface, there is a row of buttons for various actions: "Audio Signature", "Billing", "Cancel (Price)", "Cancel (Services)", "Cancellation", "CC#", "Change", "Claim", "Commercial", "Confirm: Addr", "Consent: Email", "Coverage Enquiry", "Cross-Sell", "Info", "Lead", "New", "Other", "Personal", "Prospect", "Prospect", "Quote", "Referral", "Renewal", "Surety Bond", "Uber", "Underwriter", and "Upsell". Below this is a "Recent Activity" section and a media player at the very bottom with play, pause, and stop buttons, a progress bar, and a "Speed" control.

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

2a. Address: Street Address City Province Postal Code

b. Telephone Number: Business # Cell #

c. Email Address: Fax #

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)

* Policy Number (6 to 9 numeric characters — do not include letters)

Email Address (Enter your email to receive confirmation of your payment by email)

Therapy Testing - Message (HTML)

Message Insert Options Format Text

Calibri (Bo) 11 A A B I U Color Background Image Address Book Names Attach File Attach Item Business Card Calendar Signature Follow Up Options Spelling

Clipboard Basic Text

This message has not been sent.

Send To: Cc: Bcc: Subject: Therapy Attached: Therapy App V53.pdf

We are testing out a .pdf 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)

AMS360 Screen Pop

5/22/2015 1:49:05 PM | 303-819-0837

303-819-0837

Close

INFORMATION

AMS 360

← Start Policy Change Policy Renewal New Policy Wrap-up Definitions

Masters, Eric Stradiot, Mike

Customer

First Name: Eric

Last Name: Masters

Home: (303) 284-6228

Cell:

Business: (303) 819-0837

Email:

Confirm

Copy to Clipboard

Reference Number Lock

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 Cancellation Change Claim Lead - COMM Lead - PL New Other Personal Quote Renewal Underwriter Upsell

Play	Formatted Digits	Start Time	Duration	Name	Tags	Subject	Comments
▶	303-819-0837	5/22/2015 1:49:05 PM	00:00:55	Manzanarez Lopez, Ashley			
▶	303-819-0837	5/22/2015 12:31:11 PM	00:00:38	Wells, Vicky			

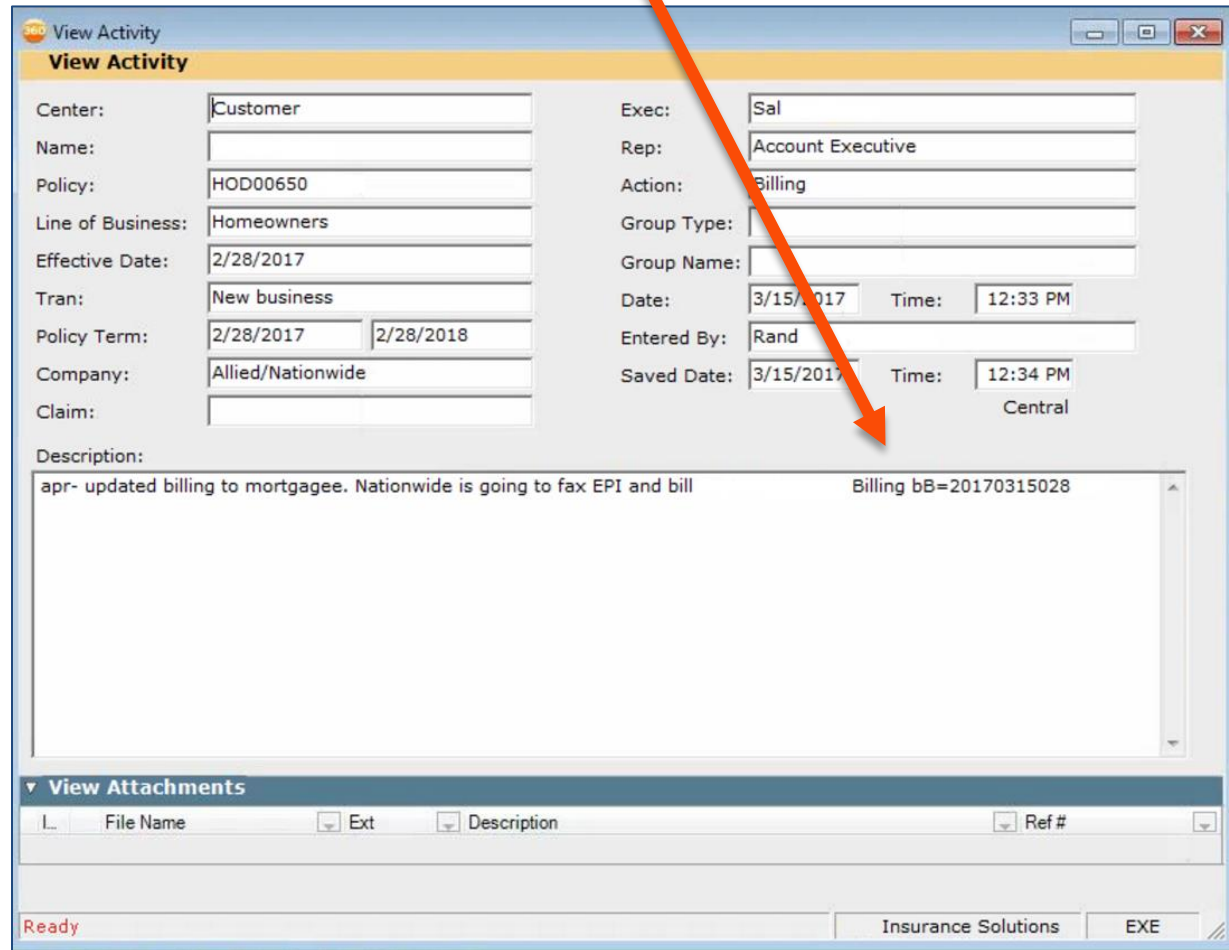
Seek To: 00:00

▶ || ◀

Not Playing

8:13 AM 5/26/2015

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



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 Central
Claim:			

Description:

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

View Attachments

File Name	Ext	Description	Ref #
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Ready Insurance Solutions EXE

Call Tags identify calls of interest to management

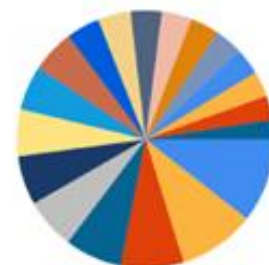
Are Raymond and Marilyn the only ones using the upsell scripts? (click to listen)

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

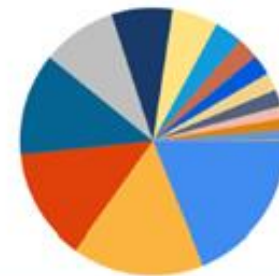
Click on any cell to drill-down to the call details

Tagged Calls By Employee Report

Calls Tagged / Employee



Calls / Tag




	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	128	63	36	46	93	12	2	0	0	0	19	14	0	37	0	0	4	409
Faye	94	45	28	68	38	23	22	2	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

Life Lead detail report.pdf - Adobe Reader

File Edit View Document Tools Window Help

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**