

The first phone application designed for
QQ Catalyst or any other AMS system



blueButler

for QQ Catalyst

includes automated & linked Call Recording

blueC 

blueButler is a Database Content Management Solution that integrates with your VoIP system and QQ Catalyst to provide critical work flow efficiency & continuous management oversight

- Content metric performance reports with drill down for audio verification
- Precision coaching and training
- Audio Signatures (audit trail)
- Client Info Screen Pop with Real time Activity / Suspense Creation and status display
- Workflow Checklists (mapped to Accord Forms)
- Real time Carrier Portal access
- Self Accountability Manager



blueButler
for QQ Catalyst

**How is blueButler
different than VoIP
systems that do
basic screen pops
and record calls?**

For the User

- Screen pop of client file, policies, servicing team
- Automated Activity creation
- Call Tags to categorize calls
- Linked call recordings for easy playback to clarify instructions, review client requirements, etc
- Self-accountability to ensure every client call is linked into your AMS system

Phone call details



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 Include InActive

201502280000000538 |

Checklists Close Current Call

QQ Catalyst Client data

Activity creation



Open A/R items

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

RICH-AUTO RICH-HOME

Policy

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

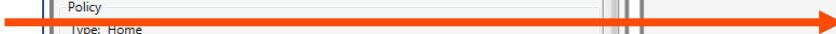
Confirm Pop

Confirm

Screen Pop



Scripts & Checklists



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!

Call Content Tags



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

Call History



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

Audio Player



00:00

Speed

Not Playing





































































blueButler
for QQ Catalyst

**How is blueButler
different than VoIP
systems that do
basic screen pops
and record calls?**

For the Manager

- Oversight of team call activity to verify that no calls are falling through the cracks
- Easy playback review of target calls based on Call Tags for precision coaching and training
- Summarized drill-down management reports of team call activity weekly or daily to spot trends and anomalies
- Checklist and Content Reports ensure staff consistently engage with customers in an advisory roll, for better customer service and customer retention

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"/>	DEVALJA01		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"/>	IMONLI001		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



blueButler
for QQ Catalyst

**How is blueButler
different than VoIP
systems that do
basic screen pops
and record calls?**

For the Owner

- Fully automated audit trail of all calls in/out of the agency linked to secure tamper-proof original recordings
- Agency oversight reports to ensure campaigns are being promoted (seasonal or new markets, leads and referrals, brand awareness, etc.)
- Spot audit calls made by staff that are struggling or have complaints made against them by clients
- Quick resolution of disputes through immediate access to call recordings related to the issue
- Audio signature process to drive efficiencies and enable immediate billings with clear "intent to bind" instructions from clients

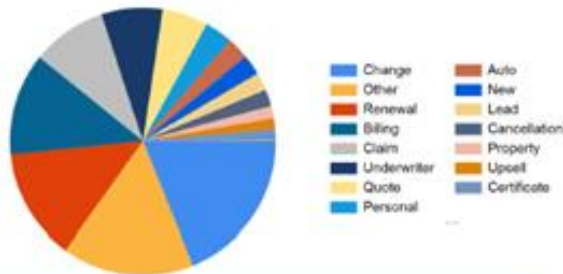
Call Tags identify calls of interest to management

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	26	66	38	23	23	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

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

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

How much time and money have you saved not having to chase signatures?

blueButler is by far the best tool available to:



- Avoid and Protect against E&O
- Ensure your staff is efficiently following best practices
- Retain customers through continuous exceptional customer service
- Drive Revenue and your Bottom Line