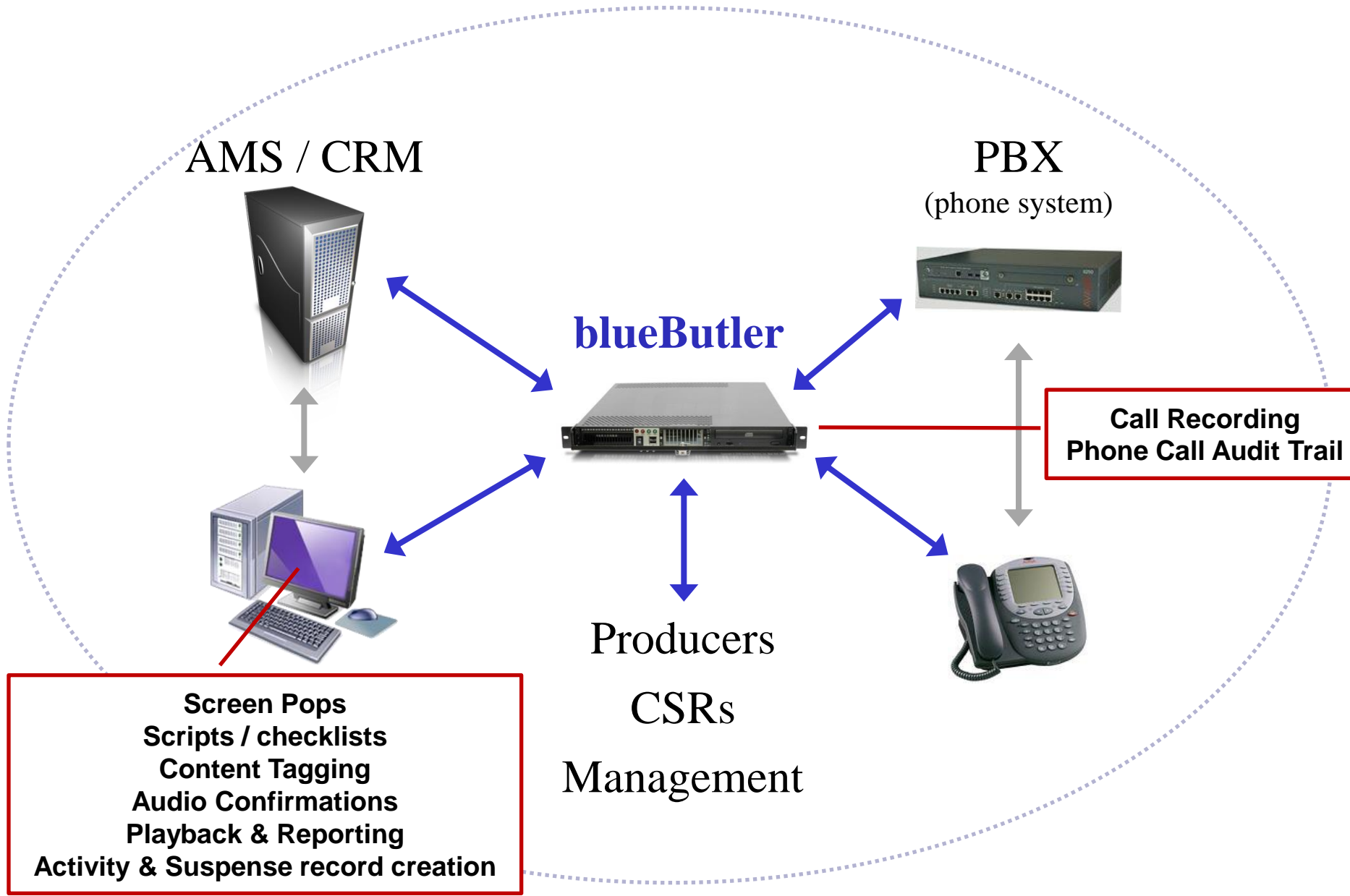


What is blueButler?



**Agency workflow
call recording / guidance
automatically integrated
into your
Agency Management System**

blueButler – Technical Environment



NEW blueButler Real-Time Screen

- The RTI automatically pops open at the start of every call.
- blueButler automatically displays the client file information (based on caller ID or policy number).
- The RTI provides content tags, scripts, checklists and guides in real time to help maximize every call, including revenue generation prompts. All of these are customizable to match your workflows.
- blueButler automatically creates the “activity” and “suspense” in your AMS/CRM at the end of the call including any content tags or comments entered as well as a link to the audio file.

The screenshot displays the blueButler interface with the following components:

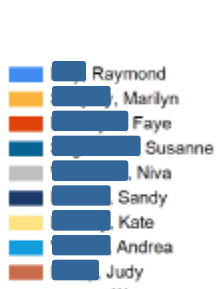
- Header:** Call ID 302, Client Marie-France Larouche, Date 3/1/2015, Time 4:41:48 PM, In: 905-555-0118, Duration: 00:00:40, Held: 00:00:00. Includes 'Close' and 'Current Call' buttons.
- Search:** A search bar containing the number 905-555-0118.
- Navigation:** Tabs for INFORMATION, DEMO, and Activity. A menu bar includes Start, Policy Change (highlighted), Policy Renewal, New Policy, Cancel, Wrap-up, and Definitions.
- Activity Log (Left Panel):** Shows 'Activity Code' as 'Phone Call' and 'Activity' as 'Change for finished basement. Add special limit for jewelry.' with a 'Create Activity' button.
- Policy Change Guide (Main Panel):** Titled 'POLICY CHANGE - PROPERTY', it lists options like UPSELLS, Changes or additions, Special limits, etc. It contains instructions: 'Listen to the client's change request.', 'Any Upsells?', and 'Click Audio Signature to complete the policy change process.' with a '[Audio Signature]' button.
- Buttons:** A row of buttons for various actions: Audio Signature, Billing, Cancel (Other), Cancel (Price), Cancel (Services), Cancellation, Change (highlighted), Claim, CONSENTMENT - Automobile, Coverage Enquiry, Cross sell, Cross-Sell, Debtor Contact, Lead, New, New Policy, Office PKG, Other, Personal, Price Review, Quote, Referral, Renewal, Service, Underwriter, Upsell.
- Table:** A table with columns: Play, Formatted Digits, Start Time, Duration, Name, Tags, Customer #, Policy #, Customer Type, Subject, Comments. It lists four call entries.
- Footer:** A media player interface with play/pause buttons, a progress bar at 00:00, a speed control, and the text 'Not Playing'.

Play	Formatted Digits	Start Time	Duration	Name	Tags	Customer #	Policy #	Customer Type	Subject	Comments
▶	416-555-0148	3/1/2015 4:49:37 PM	00:00:51	Colleen Jones	Upsell, Audio Signature, Renewal	CUST002				
▶	204-555-0187	3/1/2015 4:49:01 PM	00:00:16	Marie-France Larouche	Coverage Enquiry, Upsell, Change, Audio Signature	CUST002				
▶	778-555-0113	3/1/2015 4:48:32 PM	00:00:30	Glenn Howard	Change, Audio Signature, Upsell	CUST002	POL001			
▶	418-555-0156	3/1/2015 4:47:32 PM	00:01:04	Colleen Jones	Change, Audio Signature	CUST002	8745-36			

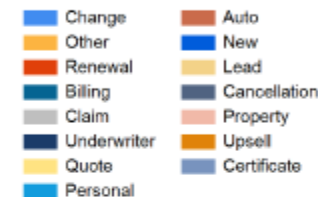
NEW blueButler Call Content Reports

blueButler Call Content Tag Reports provide powerful management information. The sample report (from a live customer system), is a “drill down” PDF report that is emailed to management on a schedule of choice.

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	63	208	63	36	46	93	12	2	0	0	19	14	0	37	0	0	4	409
Faye	94	49	26	60	36	29	22	2	9	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

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10/7/2014 12:02:03 PM