



With blueButler, performance in all areas critical to agency success will dramatically and consistently improve in ways you never thought possible:

- customer retention
- revenue growth
- competition against direct & on-line sellers
- E&O avoidance and protection
- improved customer experience
- adding to the bottom line

**Haber Blain Insurance Brokers**

“We have seen a marked improvement in our retention ...”

**Willis Insurance**

“This recording solution is now fundamental to our business efficiencies ...”

**Bryson & Associates Insurance**

“blueButler is one of the best technologies we’ve ever implemented.”

blueButler’s Real-time Interface Screen makes it happen, *every time you pick up your office phone:*

The screenshot shows the blueButler interface with the following details:

- Call Information:** 302 : Marie-France Larouche ( Completed ) 3/1/2015 4:41:48 PM In : 905-555-0118 Duration: 00:00:40 Held: 00:00:00
- Search:** 905-555-0118
- Navigation:** Start | Policy Change | Policy Renewal | New Policy | Cancel | Wrap-up | Definitions
- Policy Change Options:** POLICY CHANGE - PROPERTY | UPSELLS | Changes or additions | Special limits | Secondary residences | Other Exposures... | Discounts | Claims
- Checklist:**
  - Operate a business in your home?
  - Director or member of a board or an association?
  - Employees (nannies, cleaning staff, gardens, etc?)
  - Computer, hardware, software?
  - Classic, antique or recreational vehicles?
  - Any family members away at school?
  - Contents located elsewhere or at your place of business?
  - Leave your residence for extended periods of time?
- Buttons:** Audio Signature, Billing, Cancel (Other), Cancel (Price), Cancel (Services), Cancellation, Change, Claim, Coverage Enquiry, Cross-Sell, Debtor Contact, Lead, New, Office PKG, Other, Personal, Price Review, Quote, Referral, Renewal, Underwriter, Upsell
- Call History Table:**

Play	Formatted Digits	Start Time	Duration	Name	Customer #	Policy #	Tags	Customer Type	Subject	Comments
▶	416-555-0148	3/1/2015 4:49:37 PM	00:00:51	Colleen Jones	CUST002		Upsell, Audio Signature, Renewal			
▶	9-1-416-555-6969	3/1/2015 4:49:36 PM	00:00:20	Glenn Howard	CUST002		Audio Signature, Change			
▶	204-555-0187	3/1/2015 4:49:01 PM	00:00:16	Marie-France Larouche	CUST002		Coverage Enquiry, Upsell, Change, Audio Signature			
▶	778-555-0113	3/1/2015 4:48:32 PM	00:00:30	Glenn Howard	CUST002	POL001	Change, Audio Signature, Upsell			
- Audio Player:** 00:00 | Not Playing



blueButler is architected to support virtually every type of phone system and it integrates with most agency management systems. blueButler has been embraced by hundreds of agencies where it is having a major impact in their businesses.

blueButler Features	Most Important Agency Business Issues					
	Customer Retention	Revenue Growth	Competition from Directs	E&O Management	Customer Experience	Productivity
Warm Renewals	X		X		X	
Once-and-Done phone calls	X		X		X	X
Call Recordings for Audits / Reviews				X	X	X
Screen Pop with Client's Call History*					X	X
Automated Activity Record Creation*				X		X
Link Call Recordings to your Agency Management system				X		X
Checklists, Guides and Scripts	X		X	X	X	
Upsell Reminders		X				
Call Wrap-up Script	X	X			X	
TAG – Saving Cancellations	X		X			
TAG – Price Review calls	X		X			
Coaching and Training	X	X	X	X	X	
Automated Drill-Down PDF Reports	X	X	X	X	X	
Revenue Reports		X				
Daily Lead Reports		X				

\* not available with all Agency Management systems



blueButler’s features are designed to specifically address the key business issues that agencies face. The table below describes how each blueButler feature impacts specific business issues.

blueButler Features	Description
<p><b>Warm Renewals</b></p>	<p>This is a process where your staff calls the customer 30 to 60 days ahead of the renewal date, reviews their policy and the estimated price and asks them to confirm through an audio confirmation that they wish to renew. This has the effect of taking the business off the street before your customers are impacted by the constant ads claiming that they will save money if they switch. Now your customer is expecting the bill when it arrives. In particular, you can implement this process for your high value and at risk policies. And if you get resistance on the renewal, you can let your producer know so that they can call the customer and attempt to save the account.</p>
<p><b>Once-and-Done phone calls</b></p>	<p>You can delight customers with an enhanced customer experience by offering them a once-and-done call process. blueButler has an audio confirmation script that lets your staff take confirmations and acknowledgements over the phone so there is no need to follow up with customers after the documents are sent to them. No need to chase paper or responses.</p> <p>With blueButler, you can use Once-and-Done audio confirmations and acknowledgements to lock down your business during the customer call. Customers appreciate the convenience and you avoid the risk of losing the business while you wait for the customer’s response.</p> <p>blueButler enables you to deliver a Once-and-Done call experience – no need to chase the customer afterwards and subject them to voicemail tag or reminder emails.</p> <p>With blueButler’s recorded conversations linked to your agency management system files, you have all of the details of what was discussed with the customer in the recording. There is no need to enter copious notes in the activity record for E&amp;O protection – now a short note will suffice.</p> <p>blueButler’s Once-and-Done audio confirmations and acknowledgements eliminates follow-up time with customers after a Policy Change or Renewal call. Think how much time staff can save by not getting caught in voicemail tag or chasing confirmations.</p>



blueButler Features	Description
<p><b>Call Recordings for Audits / Reviews</b></p>	<p>With blueButler, you can use call scripts and checklists to ensure staff don't skip steps in processes and expose you to an E&amp;O risk. For instance, on policy changes blueButler can remind staff to restate the change being made and ask customer to confirm using an audio confirmation. You can easily tag calls where an E&amp;O risk may be higher such as a Coverage Enquiry about overland water damage and spot audit the calls to ensure staff responds properly.</p> <p>When you have a complex coverage issue such as a Commercial policy, you can review all of the conversations including those with the underwriters to ensure understandings are correct about what is and is not covered.</p>
<p><b>Screen Pop with Client's Call History*</b></p>	<p>blueButler provides a screen pop of the client record and related policies at the start of every call as well as the previous call history allowing a more personalized experience.</p>
<p><b>Automated Activity Records*</b></p>	<p>blueButler streamlines your workflows with the ability to automatically create the Activity record for the call in your Agency Management system by simply clicking a button in the blueButler real-time interface. The Activity record includes any Tags that were selected in blueButler to identify the call content as well as a link to the recorded conversation. blueButler marks these calls as "shared" so that others who need access to the recording can listen to it.</p>
<p><b>Link Call Recordings to your Agency Management system</b></p>	<p>With blueButler, every conversation is recorded and linked to the customer's file in your Agency Management system. This lets you resolve "he-said / she-said" disputes quickly when they arise by letting your customer hear what was actually discussed rather than simply relying on notes in the customer file.</p> <p>When someone calls in sick or goes on vacation, there is no need for others to call the customer and have them repeat information – anyone can listen to the recorded conversation where customer provided the details.</p> <p>With blueButler's recorded conversations linked to your agency management system files, you have all of the details of what was discussed with the customer in the recording. There is no need to enter copious notes in the activity record for E&amp;O protection – now a short note will suffice.</p> <p>Handing off client files between staff members is simple. With blueButler, there is no need for detailed discussions on where things are at – the user can simply listen to the previous call(s) with the customer and be up-to-speed in minutes.</p>
<p><b>Checklists, Guides and Scripts</b></p>	<p>blueButler has checklists and scripts available through its real-time interface that can assist the user in a competitive situation. These can include talking points to help staff position your offerings versus the competition.</p>



blueButler Features	Description
<b>Upsell Reminders</b>	The blueButler real-time interface screen pops open at the start of every call with call guides and prompts that remind staff to talk about upsells and cross-sells during every Policy Change and Renewal call. The upsell guides and prompts are customized by your management team to focus on the markets and policy options where you see the largest opportunities.
<b>Call Wrap-up Script</b>	At the end of every call workflow, blueButler has a wrap-up script with reminders to every staff member to promote your current campaign, ask for referrals, and has talking points to help uncover lead opportunities.
<b>TAG – Saving Cancellations</b>	With this process, staff tag calls when a customer is cancelling for price or service concerns. blueButler sends reports to management daily or twice daily on these cancellations. You can click to listen to the conversation and have the chance to win them back before the cancellation goes through.
<b>TAG – Price Review calls</b>	Staff can tag calls where the customer asks for a Price Review to see if they can reduce their premium. These are calls that indicate that a customer may be starting to shop around. Management can receive reports on these calls and click to listen to decide if the producer should be calling the customer to save the account before they call to cancel.
<b>Coaching and Training</b>	blueButler is an incredible tool for coaching and training to help everyone learn how to handle competitive questions when they are raised. Simply let staff listen to calls where others were successful in positioning your offerings and were able to deal with competitive threats.
<b>Automated Drill-Down PDF Reports</b>	With blueButler, you get critical management insight about your operations automatically sent to you as emailed PDF drill-down reports. For every area of your business that you are interested in (leads, new quotes, renewals, referrals, etc) you'll receive a report however frequently you want it – daily, weekly, or monthly. Now you have a benchmark for each activity of interest and you can drill-down on those calls of interest to audit how your staff handle each issue. And, you can share the best call examples with other staff so that everyone improves their performance by hearing first-hand how your top performers do it.



blueButler Features	Description
<p><b>Revenue Reports</b></p>	<p>blueButler has powerful drill-down management reports that you use to track revenue generation performance by individual staff members. For instance, a monthly summary report will show how many upsells, leads, and referrals each person generated. By seeing the performance of your top people, you now have a benchmark on what’s possible. You can drill down with precision to listen to some of those successful calls and then share them with other team members – there is no better training material than listening to how one of your peers is successfully doing the same task that you are being asked to do! These reports are automatically emailed daily, weekly and/or monthly as you decide.</p>
<p><b>Daily Lead Reports</b></p>	<p>blueButler makes it easy for CSRs pass leads and referrals onto whoever is responsible to follow up on them. CSRs simply tag the call as a lead or referral and blueButler will automatically forward a lead/referral report to the manager or producer responsible. They can click-to-listen to the recorded conversation to hear the customer’s request before calling to be better equipped to handle it and provide an enhanced customer experience.</p> <p>Handing off leads to producers can be a time-consuming task so it is often avoided. blueButler lets you automate your Lead generation process – CSRs simply tag a call as a lead and the manager or producer responsible gets a daily lead report that includes the recorded conversation with the customer.</p>

\* not available with all Agency Management systems

*With their in depth understanding of customer service, blueC helped develop the integration to fit the specific needs of our brokerage, and the broker channel as a whole. In leveraging the integration, we have successfully streamlined workflows and processes, leading to more efficient training practices, increased staff productivity, and increased customer satisfaction – all contributing to an increase in revenue and profitability.*

*Dave Bertolin, CIP – Managing Director IT & Finance/Deputy Principal  
BROKERS TRUST INSURANCE GROUP INC.*

**Interested in learning more?**

If you would like a one-on-one discussion to see how blueButler can help your agency, please contact us:

**phone:** 1-877-730-BLUE      **email:** [sales@bluec802.com](mailto:sales@bluec802.com)

