The first phone application designed for Insurance Agencies

power broker
ACTURIS CANADA

blueButler

includes automated & linked Call Recording

blueC

blueButler

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

- blueButler Screen Pop
- Recent Call History Display
- Automated Call Meta-data Capture
- Customized Real Time Checklists
- Call Content Tagging
- Automated MP3 Call Recording File
- 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			
	2/22/2017 4:36:52 PM	Out	1-555-555-1234	00:11:10	Beverly	☑	☑	ATHBOCH01			Quote
	2/22/2017 4:32:48 PM	Out	1-555-555-1234	00:05:43	Anna	☑	☑	ILMORLI01			
	2/22/2017 4:30:03 PM	In	1-555-555-1234	00:01:08	Angie	☑	☑	AVENJO001			
	2/22/2017 4:29:35 PM	Out	1-555-555-1234	00:00:33	Carol	☑	☑	OULINMA01			Cancel
	2/22/2017 4:28:30 PM	In	1-555-555-1234	00:02:15	Arianne	☑	☑	EARCEDA02			
	2/22/2017 4:28:29 PM	Out	1-555-555-1234	00:02:58	Colleen	☑	☑	LENSTA-01			
	2/22/2017 4:28:12 PM	Out	1-555-555-1234	00:01:07	Shane	☑	☑	ARRCH0002			Ext-voicemail
	2/22/2017 4:27:18 PM	Out	1-555-555-1234	00:06:52	Kristin	☑	☑	CCRACLY01			
	2/22/2017 4:26:46 PM	Out	1-555-555-1234	00:08:38	Heidi	☑	☑	OTELHER01			Quote, Enquiry
	2/22/2017 4:26:06 PM	Out	1-555-555-1234	00:12:23	Vicki	☑	☑	RAYAN0001			
	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			
	2/22/2017 4:23:26 PM	Out	1-555-555-1234	00:00:49	Kristin	☑	☑	OCKETBR01			
	2/22/2017 4:23:17 PM	In	1-555-555-1234	00:05:25	Tracey	☑	☑	DEYALIA01			
	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			Renewal
	2/22/2017 4:21:54 PM	In	1-555-555-1234	00:03:20	Shylia	☑	☑	IMONLI001			
	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			Underwriter
	2/22/2017 4:19:20 PM	Out	1-555-555-1234	00:00:48	Irene	☑	☑	IACEKDA01			
	2/22/2017 4:18:55 PM	In	1-555-555-1234	00:09:47	Amy	☐	☐				Personal

How blueButler for AMS/BMS works

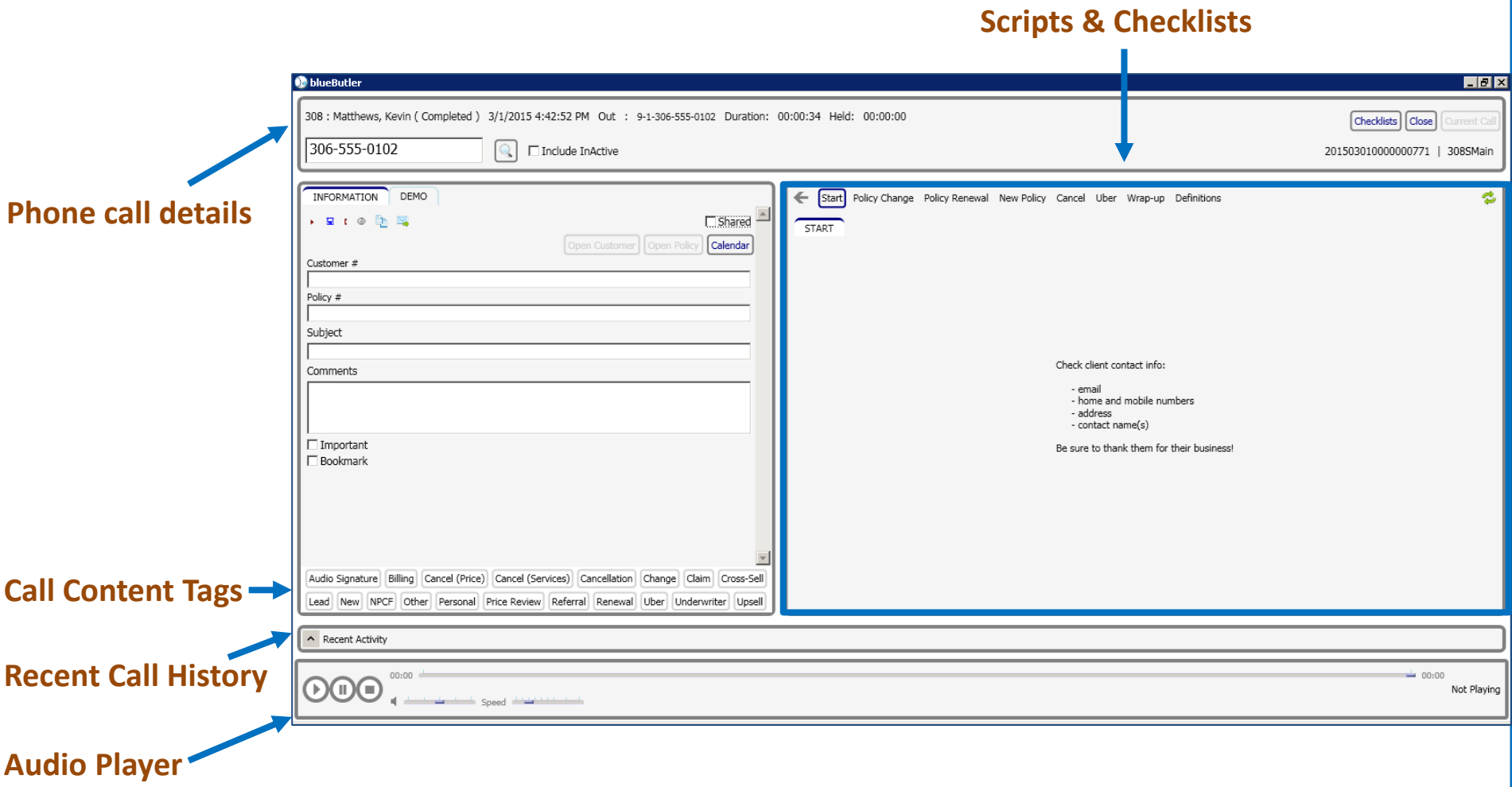
Whether calls go through reception

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

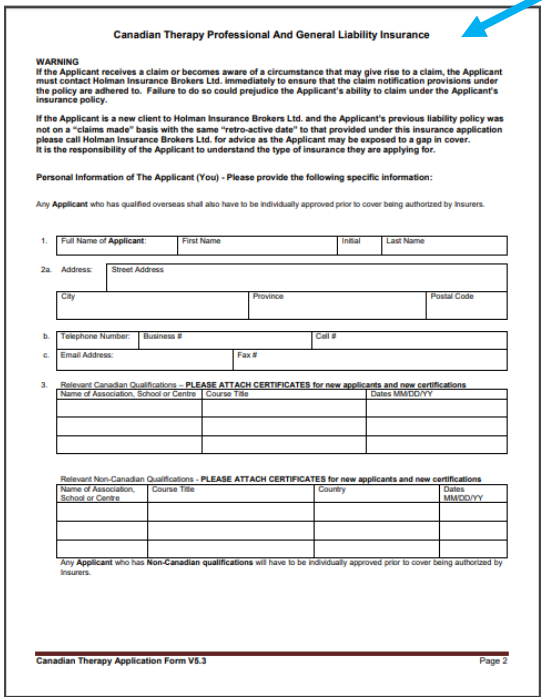
How blueButler for AMS/BMS works

blueButler knows which phone is connected to which desk computer

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


Scripts & Checklists
Phone call details
Call Content Tags
Recent Call History
Audio Player
blueButler
308 : Matthews, Kevin (Completed) 3/1/2015 4:42:52 PM Out : 9-1-306-555-0102 Duration: 00:00:34 Held: 00:00:00
Checklists
Close
Current Call
306-555-0102
Include InActive
20150301000000771 | 308SMain
INFORMATION
DEMO
Shared
Open Customer
Open Policy
Calendar
Customer #
Policy #
Subject
Comments
Important
Bookmark
Audio Signature
Billing
Cancel (Price)
Cancel (Services)
Cancellation
Change
Claim
Cross-Sell
Lead
New
NPCF
Other
Personal
Price Review
Referral
Renewal
Uber
Underwriter
Upsell
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!
Recent Activity
00:00
00:00
Speed
Not Playing

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**

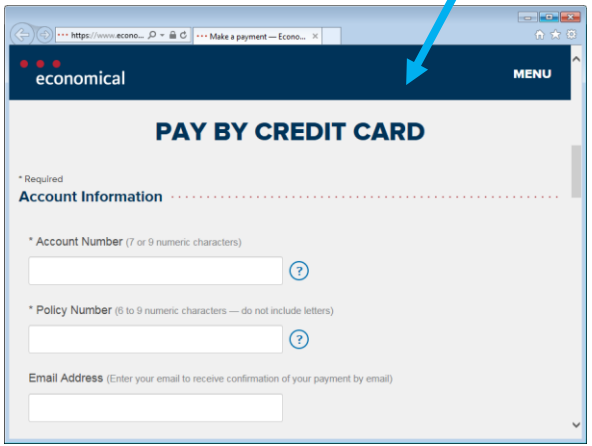
Name of Association, School or Centre	Course Title	Dates MM/DD/YY

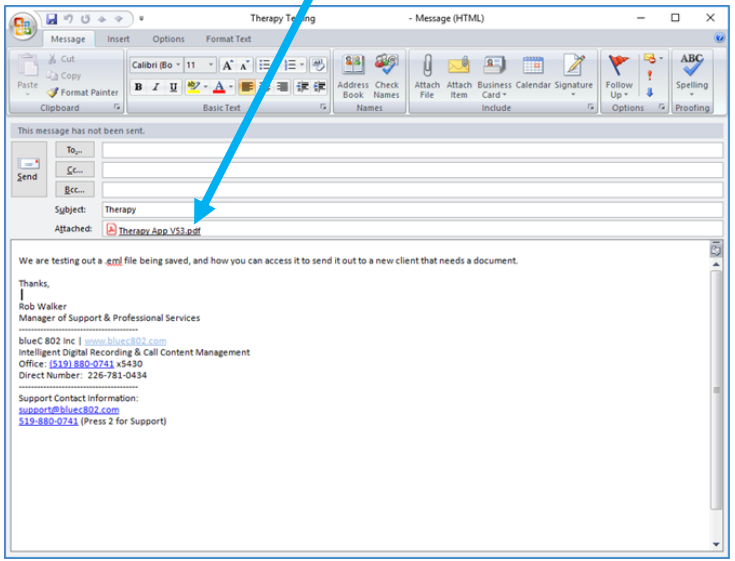
Relevant Non-Canadian Qualifications - **PLEASE ATTACH CERTIFICATES for new applicants and new certifications**

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 Page 2

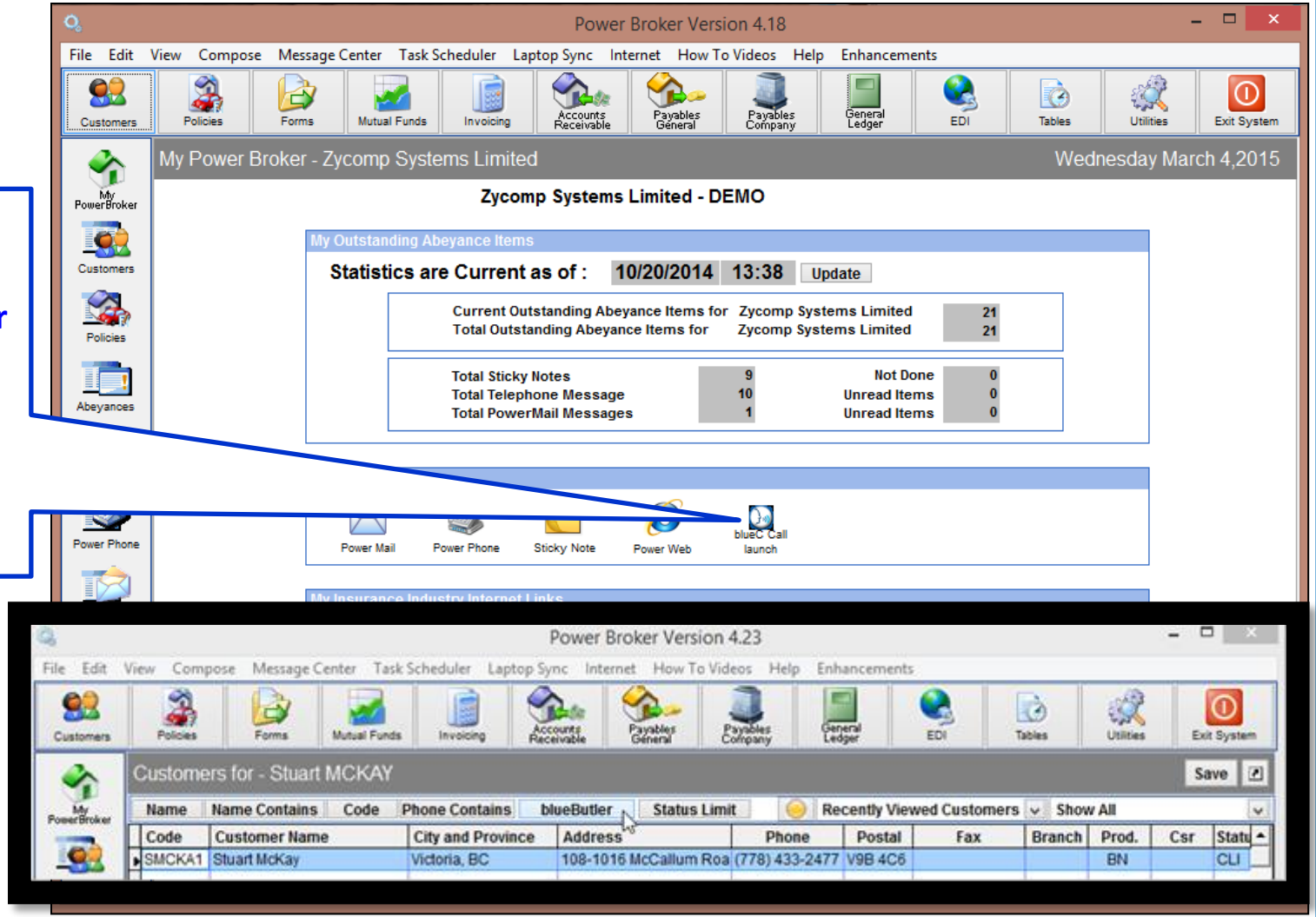




Power Broker Screen Pop

Get the caller-id

On the Power Broker homepage the blueButler search button will display matches to the inbound call.

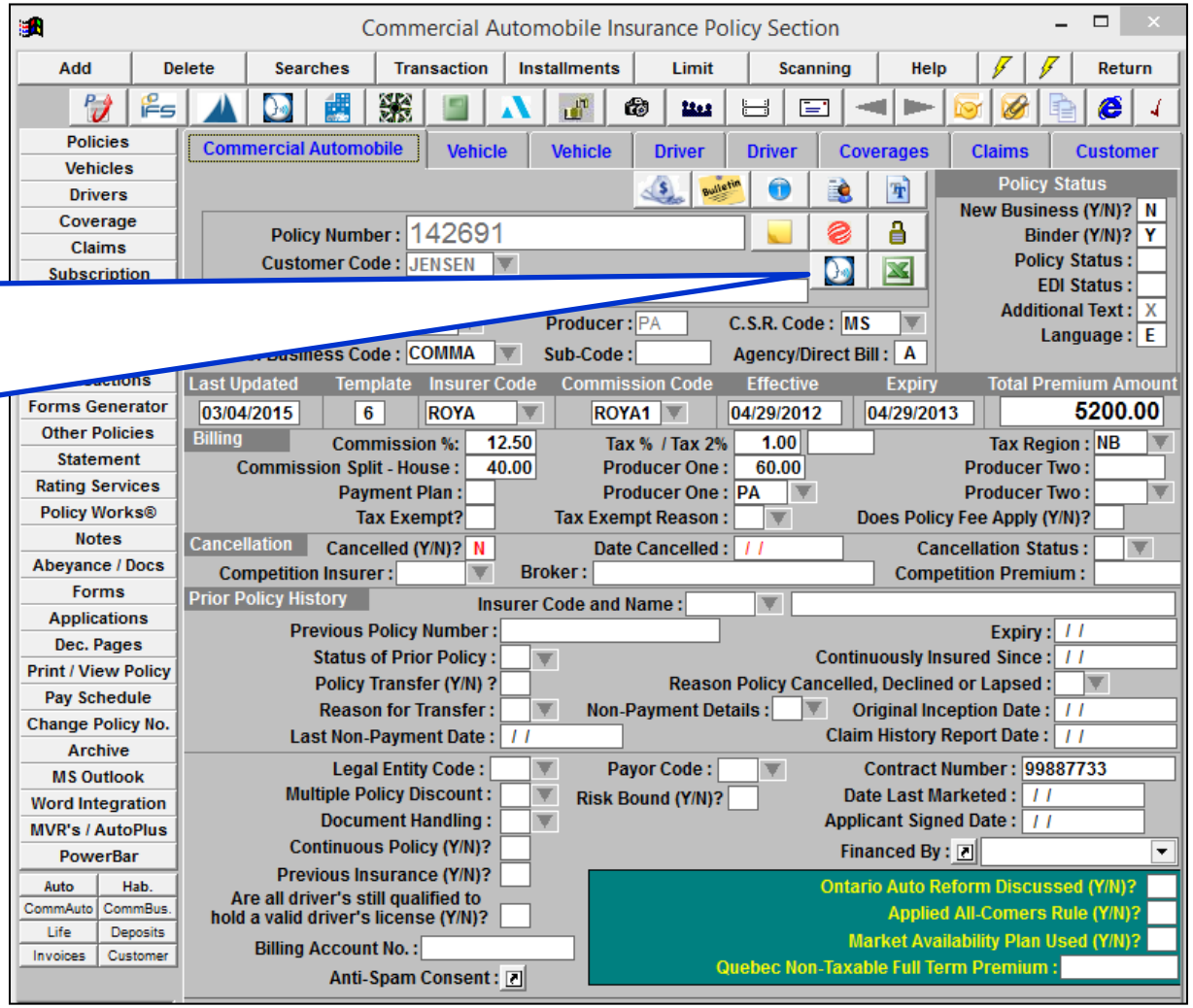


Screen display copyright Zycomp.

Power Broker Screen Pop

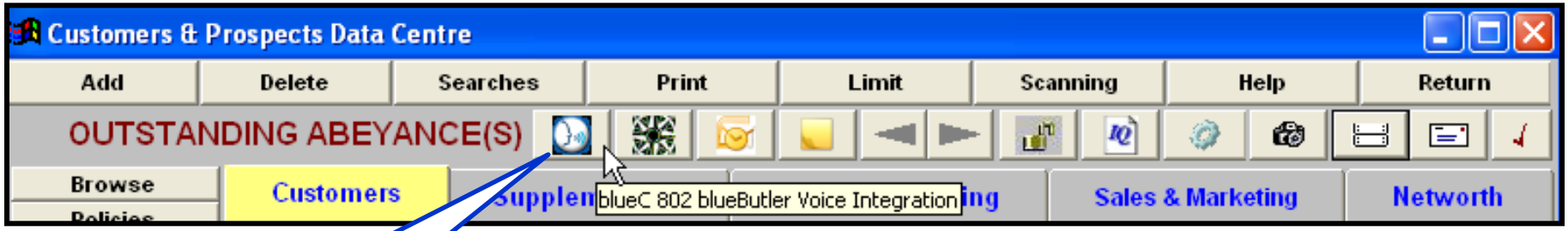
Get the caller-id

On the Power Broker Policy page the blueButler search button will open a 2nd instance of Power Broker to display matches to the inbound call.



Screen display copyright Zycomp.

Power Broker Abeyance Linking to blueButler

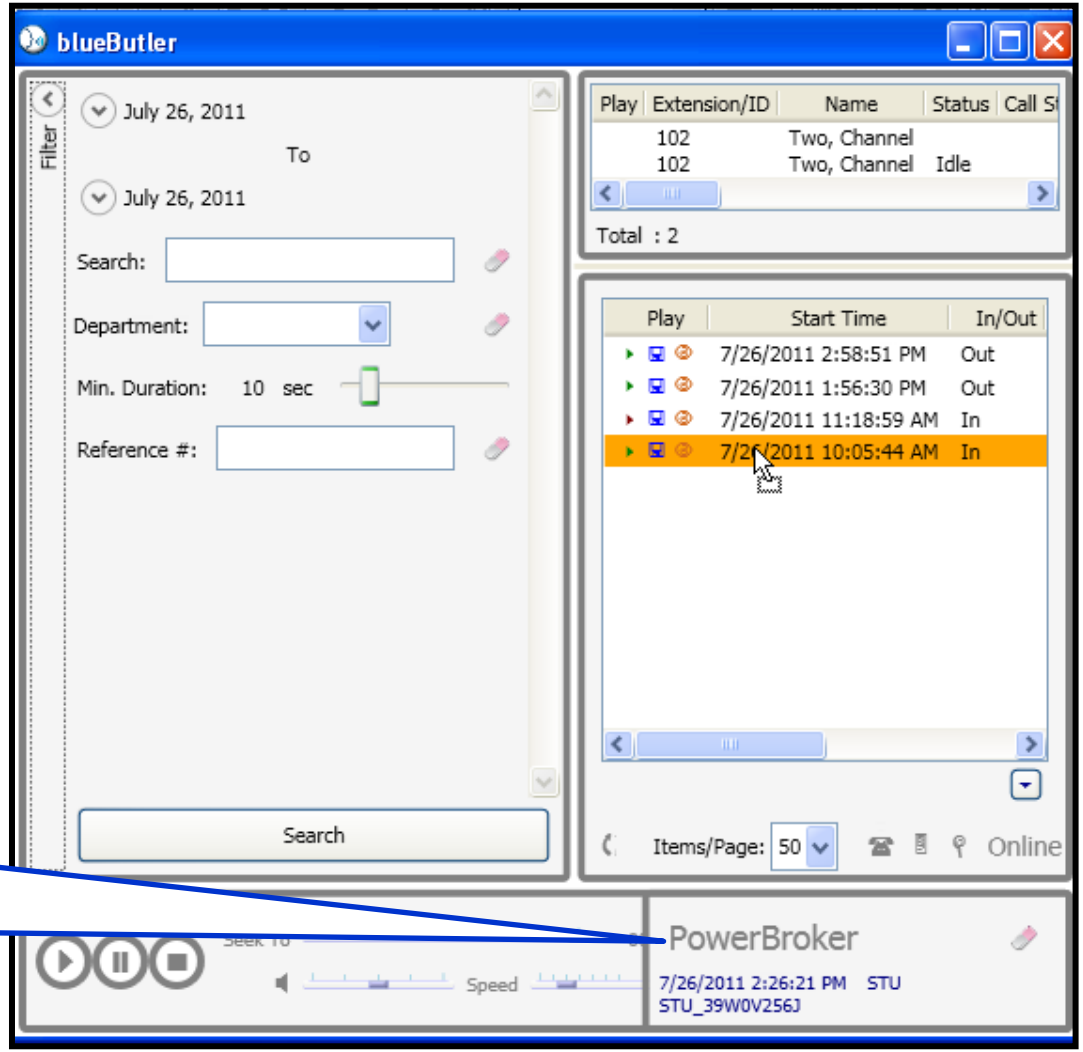


Create an Abeyance record in Power Broker and link it to the call recording file in blueButler

Screen display copyright Zycomp.

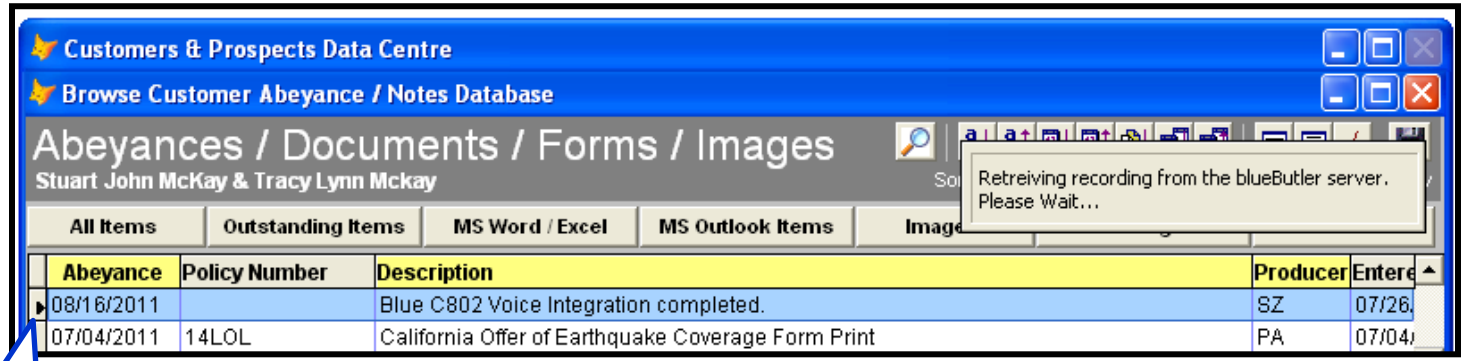
Power Broker Abeyance Linking to blueButler

Drag and drop the PowerBroker link to the recording record in blueButler. Click Proceed in PowerBroker to complete the linking process.



Screen display copyright Zycomp.

Playback a recording linked in Power Broker



Click the abeyance attachment to playback a recording.

Screen display copyright Zycomp.

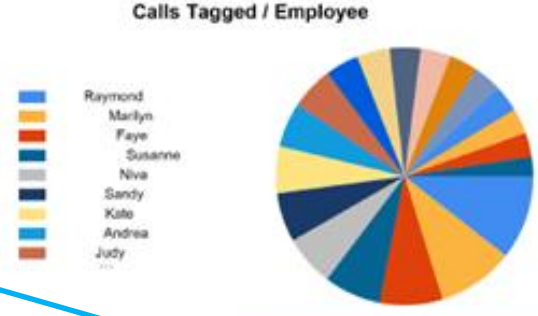
Call Tags identify calls of interest to management

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



	Change	Other	Renewal	Billing	Claim	Underw…	Quote	Pers…	Aut…	Ne…	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
[illegible]	[illegible]	[illegible]	63	36	46	93	12	2	0	0	19	14	0	37	0	0	4	409
Faye	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	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