

**The first phone application designed for
Insurance Agencies**



blueButler

includes automated & linked Call Recording

blueC 































blueButler

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

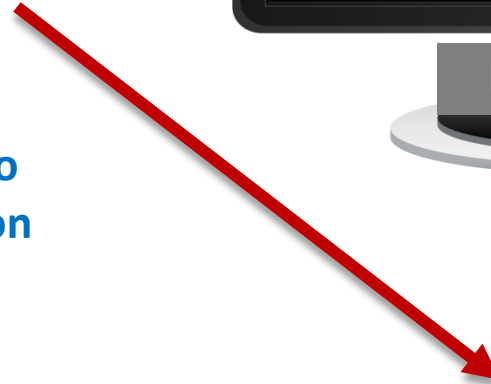
- blueButler Screen Pop
- Recent Call History Display
- Automated Call Meta-data Capture
- Customized Real Time Checklists
- Call Content Tagging
- Automated MP3 Call Recording File
- Click to Call

- 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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CCRACLY01			
 	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			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			
 	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			
 	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			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			
 	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			
 	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			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			
 	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			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			
 	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			
 	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			
 	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			
 	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			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			
 	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			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			
 	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 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

The screenshot displays the blueButler software interface. At the top, a header bar shows the call ID '308 : Matthews, Kevin (Completed)', the date and time '3/1/2015 4:42:52 PM', and other call details. Below this, a search bar contains the number '306-555-0102'. The main interface is divided into two panels. The left panel, titled 'INFORMATION', contains fields for 'Customer #', 'Policy #', and 'Subject', along with a 'Comments' text area and checkboxes for 'Important' and 'Bookmark'. Below these fields is a row of call content tags including 'Audio Signature', 'Billing', 'Cancel (Price)', 'Cancel (Services)', 'Cancellation', 'Change', 'Claim', 'Cross-Sell', 'Lead', 'New', 'NPCF', 'Other', 'Personal', 'Price Review', 'Referral', 'Renewal', 'Uber', 'Underwriter', and 'Upsell'. The right panel, titled 'START', shows a navigation menu with options like 'Start', 'Policy Change', 'Policy Renewal', 'New Policy', 'Cancel', 'Uber', 'Wrap-up', and 'Definitions'. Below the menu, it displays a checklist: 'Check client contact info:' followed by a list of items: '- email', '- home and mobile numbers', '- address', and '- contact name(s)'. Below the checklist, it says 'Be sure to thank them for their business!'. At the bottom of the interface, there is a 'Recent Activity' section and an 'Audio Player' with playback controls and a progress bar.

Phone call details

Call Content Tags

Recent Call History

Audio Player

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

https://www.econo... D -> Make a payment - Econo... x

economical MENU

PAY BY CREDIT CARD

* Required

Account Information

* Account Number (7 or 9 numeric characters)

* Policy Number (@ 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

Send To: Cc: Bcc:

Subject: Therapy

Attached: Therapy App V53.pdf

This message has not been sent.

We are testing out a .gml 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)

Power Broker Screen Pop

Get the caller-id

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

Power Broker Version 4.18

File Edit View Compose Message Center Task Scheduler Laptop Sync Internet How To Videos Help Enhancements

Customers Policies Forms Mutual Funds Invoicing Accounts Receivable Payables General Payables Company General Ledger EDI Tables Utilities Exit System

My Power Broker - Zycomp Systems Limited Wednesday March 4, 2015

Zycomp Systems Limited - DEMO

My Outstanding Abeyance Items

Statistics are Current as of : 10/20/2014 13:38 Update

Current Outstanding Abeyance Items for	Zycomp Systems Limited	21
Total Outstanding Abeyance Items for	Zycomp Systems Limited	21

Total Sticky Notes	9	Not Done	0
Total Telephone Message	10	Unread Items	0
Total PowerMail Messages	1	Unread Items	0

Power Phone

Power Mail Power Phone Sticky Note Power Web blueC Call launch

Power Broker Version 4.23

File Edit View Compose Message Center Task Scheduler Laptop Sync Internet How To Videos Help Enhancements

Customers Policies Forms Mutual Funds Invoicing Accounts Receivable Payables General Payables Company General Ledger EDI Tables Utilities Exit System

Customers for - Stuart MCKAY Save

Name Name Contains Code Phone Contains blueButler Status Limit Recently Viewed Customers Show All

Code	Customer Name	City and Province	Address	Phone	Postal	Fax	Branch	Prod.	Csr	Statu
SMCKA1	Stuart McKay	Victoria, BC	108-1016 McCallum Roa	(778) 433-2477	V9B 4C6			BN		CLI

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.

Commercial Automobile Insurance Policy Section

Add Delete Searches Transaction Installments Limit Scanning Help Return

Policies Vehicles Drivers Coverage Claims Subscription

Commercial Automobile Vehicle Vehicle Driver Driver Coverages Claims Customer

Policy Number: 142691
Customer Code: JENSEN

Producer: PA C.S.R. Code: MS

Business Code: COMMA Sub-Code: Agency/Direct Bill: A

Policy Status
New Business (Y/N)? N
Binder (Y/N)? Y
Policy Status:
EDI Status:
Additional Text: X
Language: E

Forms Generator Other Policies Statement Rating Services Policy Works® Notes Abeyance / Docs Forms Applications Dec. Pages Print / View Policy Pay Schedule Change Policy No. Archive MS Outlook Word Integration MVR's / AutoPlus PowerBar

Auto Hab. CommAuto CommBus. Life Deposits Invoices Customer

Last Updated: 03/04/2015 Template: 6 Insurer Code: ROYA Commission Code: ROYA1 Effective: 04/29/2012 Expiry: 04/29/2013 Total Premium Amount: 5200.00

Billing
Commission %: 12.50 Tax % / Tax 2%: 1.00 Tax Region: NB
Commission Split - House: 40.00 Producer One: 60.00 Producer Two:
Payment Plan: Producer One: PA Producer Two:
Tax Exempt?: Tax Exempt Reason: Does Policy Fee Apply (Y/N)?

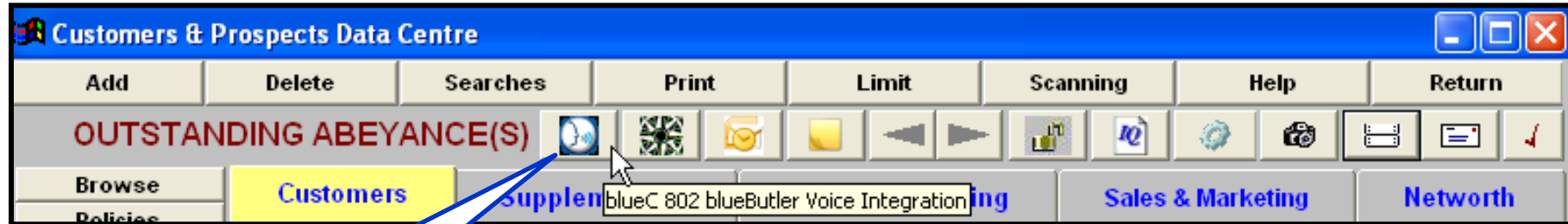
Cancellation
Cancelled (Y/N)? N Date Cancelled: // Cancellation Status:
Competition Insurer: Broker: Competition Premium:

Prior Policy History
Insurer Code and Name:
Previous Policy Number: Expiry: //
Status of Prior Policy: Continuously Insured Since: //
Policy Transfer (Y/N)? Reason Policy Cancelled, Declined or Lapsed:
Reason for Transfer: Non-Payment Details: Original Inception Date: //
Last Non-Payment Date: // Claim History Report Date: //

Legal Entity Code: Payor Code: Contract Number: 99887733
Multiple Policy Discount: Risk Bound (Y/N)? Date Last Marketed: //
Document Handling: Applicant Signed Date: //
Continuous Policy (Y/N)? Financed By: [X]
Previous Insurance (Y/N)?
Are all driver's still qualified to hold a valid driver's license (Y/N)?
Billing Account No.:
Anti-Spam Consent: [X]

Ontario Auto Reform Discussed (Y/N)?
Applied All-Comers Rule (Y/N)?
Market Availability Plan Used (Y/N)?
Quebec Non-Taxable Full Term Premium:

Power Broker Abeyance Linking to blueButler



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



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.

blueButler

Filter

July 26, 2011 To

July 26, 2011

Search:

Department:

Min. Duration: 10 sec

Reference #:

Play	Extension/ID	Name	Status	Call S
	102	Two, Channel		
	102	Two, Channel	Idle	

Total : 2

Play	Start Time	In/Out
▶	7/26/2011 2:58:51 PM	Out
▶	7/26/2011 1:56:30 PM	Out
▶	7/26/2011 11:18:59 AM	In
▶	7/26/2011 10:05:44 AM	In

Search

Items/Page: 50

PowerBroker

7/26/2011 2:26:21 PM STU_39W0V256J

Playback a recording linked in Power Broker

Customers & Prospects Data Centre

Browse Customer Abeyance / Notes Database

Abeyances / Documents / Forms / Images

Stuart John McKay & Tracy Lynn Mckay

Retreiving recording from the blueButler server. Please Wait...

All Items	Outstanding Items	MS Word / Excel	MS Outlook Items	Image
Abeyance	Policy Number	Description	Producer	Entered
08/16/2011		Blue C802 Voice Integration completed.	SZ	07/26,
07/04/2011	14LOL	California Offer of Earthquake Coverage Form Print	PA	07/04,

Click the abeyance attachment to playback a recording.

Windows Media Player

Now Playing Library Rip Burn

Media Link for E-Mail

6050062Sblackblue\$251\$250...

6050062Sblackblue\$251\$250...

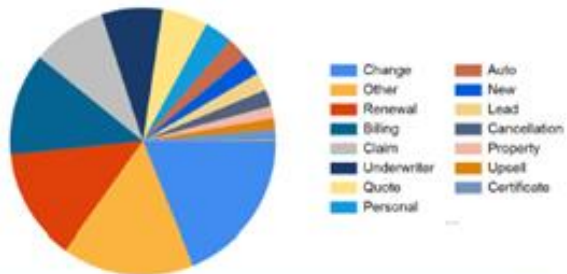
Call Tags identify calls of interest to management

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	22	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

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**