

Content and Recorded Call Management Solution for Enterprises providing Sales and Customer Relations Staff with Important Information in Real-Time



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CEOCFO: Mr. Casselli, would you tell us about blueC 802?

Mr. Casselli: blueC is a software company that provides Call Content and Recorded Call Management to enterprises with a primary focus on the insurance agency / broker market. Basically we automate the integration of telephone activity into workflows. Companies that do business over the phone can be so much more successful by using our application called “blueButler”. At the start of every phone call blueButler provides information through a pop-up capability, bringing forward client and policy information from other applications (customer relationship management systems “CRM’s” or agency management systems “AMS’s”). In real time during a phone call, blueButler provides scripts, guides and checklists to ensure accuracy and best practices in the workflow. blueButler also has a powerful database component that collects and securely stores the call information in its data base as well as in the CRM or AMS client files. blueButler software runs on a Windows platform and uses standard browser technology so the user experience is familiar and intuitive. blueButler is available as an on-site product or cloud-based offering and integrates with many of the major CRM’s and AMS’s in North America.

CEOCFO: Are most companies aware that they can be doing better, or should be doing better, on their calls? Do many companies still not realize there is technology that can help?

Mr. Casselli: I think many companies are aware of call recording and associate call recording as being useful in a call center environment. Call recording is just a small subset of blueButler. It’s one of our challenges to create awareness of “Call Content and Recorded Call Management” for the non-call center environment, where there’s a more sophisticated, more nuanced type of workflow happening compared to the call center environment. Having instant access to things like scripts, guides and phone-form checklist and client information in your CRM or AMS in real time while you are on the phone significantly enhances the experience you give to your customer. “Call Content and Recorded Call Management” is not a category of technology that’s well known in the marketplace but it will be. Once people discover and then use the application, they say, “I don’t know how we got along without it.”

CEOCFO: How are you educating the world about the idea in general, and then specifically about blueC?

Mr. Casselli: For blueC the number one method of getting the word out there is to work with the CRM and AMS manufacturers whose products are already well known in the market place such as salesforce.com. blueButler greatly enhances the utility of these CRM’s and AMS’s. blueC is primarily focused on the insurance world because there are 33 thousand insurance agencies and broker firms in North America that use insurance agency AMS’s. We integrate with most of the major AMS and make a strong case for their customers to use our integrated solution. These AMS manufactures recognize the value of strengthening their offering with a blueButler integration and so we are able to get the word out through their sales and marketing efforts.

CEOCFO: *What has evolved in implementation? How would an agency pick out what they want to use or direct the flow when they are getting into or using your system?*

Mr. Casselli: In today's world, people are looking for cloud-based solutions so they don't have to take responsibility for maintaining and evolving expensive on-site IT infrastructure and expertise. So we offer our solution as a cloud-based solution as well as an on-site product for those not ready to move into the cloud or prefer on-site technology. We use standard technology with open architecture so we can fit into and work with most IT and telephony environments we encounter. Our design is to make the technology seamless and non-distracting to the user so we can focus on the application side of things. We make it easy to customize the real time scripts, checklists and AMS integration points suited to the workflow that the end user must execute. blueButler is a communications assistant in real time. It is also a tool that provides management insight into management selected metrics tracked through call tags by blueButler with drill down playback and listen capability for coaching and training. blueButler captures information in phone conversations and makes this information available in an organized, automated way so that everyone in the organization can be better at what they do. Each enterprise gets to customize what scripts, checklists, call tags and AMS integration points they need to optimize their work flows. We consult with them to make it happen.

CEOCFO: *Would you give us an example of what an agent might be able to pull up quickly and how it would make a difference?*

Mr. Casselli: A great example is the case where an Insurance agency is asked by one of their customers to drop the "Comprehensive" insurance coverage from the customer's automobile policy to get a lower insurance premium. blueButler has a real time script that reminds the insurance agent to point out that if "Comprehensive" coverage is removed from the policy, the risk of theft of the vehicle is no longer covered. The script appears on the agent's computer screen and reminds the agent to precisely state the change in coverage (and in particular "you are no longer covered for "theft") and then the agent can just click the blueButler "Audio Signature" button as part of the process of placing the recorded call of the policy change with the Audio Signature and content tag securely in the AMS for future reference if needed. If the vehicle that is no longer covered for theft is subsequently stolen, the agency will be thankful they had immediate access to the audio signature and audio file recording of the customer stating they understood the vehicle would no longer be covered for theft.

CEOCFO: *Would you tell us about the recent certified integration with Applied Systems?*

Mr. Casselli: It's a very powerful integration. At the start of every phone call, whether inbound or outbound, blueButler is able to pop up client file client policy information immediately on the user's computer screen so it is available for use at the start of the call. Also at the start of the phone call, blueButler automatically presents on the screen the phone call history associated with the client and / or insurance policy including the parties to the calls, dates and times, the purpose of the calls -- the agent can even play the recorded call right from this screen if they wanted to share it with the other party on the call. The user has immediate access to the blueButler real time scripts and checklist for workflows and can use blueButler's automation to link the phone call information and the recording automatically into an "Activity" in Applied Epic including for workflows such as policy changes and renewals. blueButler will also read the Epic data base and put on the real time screen, any outstanding accounts receivables so the user can take care of it while they have the customer live on the phone. This integration allows anyone that has access to the Epic client file to see all of the phone call information, and play back any of the recorded calls that were automatically linked into Epic. The user can also use the "click to call" feature to call any party whose phone number is found in the Epic client file. blueButler has an intelligent call routing capability where it can (with certain VoIP systems) route inbound calls to the servicing department associated with that particular phone number. Customer service and experience is greatly enhanced through this integration and Errors and Omissions protection is brought to a whole new level.

CEOCFO: *What is your business model?*

Mr. Casselli: Our business model is to develop and distribute communications applications that are foundational to the enterprise workflow. In this way we evolve with and become part of enterprise workflow processes rather than creating commodity product that can be replaced with the next new technology. We are in the business of empowering people with the right information at the right time. This is likely to be of ongoing value. blueC's sells its solution under a direct sales model but we lever our relationships with our integrated partners sales and marketing effort. We make their products stronger, so we get referrals from them.

CEOCFO: *What has evolved over time in your approach?*

Mr. Casselli: Core telephony and network technology has enabled an organization's staff to connect their work flows in real time to multiple sources of stored data in an organized way. Processes conducted with the use of Audio Signatures allow business to be transacted in a "once and done" fashion while the customer is live on the phone are possible with

today's technology. To deliver the "once and done" experience, access to up-to-date customer information is needed as is access to the right scripts, checklists and forms. You also need to be able to securely create, store and retrieve the recorded audio. blueButler has connected these components to enable the "once and done experience". It is our task to educate the enterprise market place about the great new things they can do because of the technology. The powerful applications available in blueButler are not obvious or known and so there is the hurdle of getting people to know what they don't know. As key players in the industry become familiar with the impact blueButler has on improving workflows, they become advocates for blueButler. We are now seeing more and more people coming to us with their minds open to learning how they can benefit from blueButler.

CEOCFO: *What is next for blueC 802?*

Mr. Casselli: Automating phone activity into the agency workflow and then into the agency management system is just the beginning. What's next is making multiple communication methods - video, chat, text, mobile phone, desk phone, email - all of these methods of communication as seamless as possible where you can extract the key information needed from any of these sources to enable better execution, better customer service, and then customer self-service. The principle is to capture and organize all relevant information from all sources no matter the method of communication used, and then to organize and securely store the information in a way it can be readily accessed to benefit workflows.

CEOCFO: *Put it all together for our readers. Why pay attention to blueC802?*

Mr. Casselli: Agencies are trying to protect their installed base of customers, grow their revenue, increase their bottom line while trying to avoid errors and omissions that can put them out of business. There is no better tool than bluebutler to address each of these business issue. blueButer is not only a powerful tool to help front line staff execute their day to day workflows such as policy changes, renewals, and new quotes with great efficiency and accuracy, it will promote delivery of an awesome customer experience. Every phone call that is a policy change, renewal, new quote or just a general enquiry is a revenue opportunity to the insurance agency and the blueButler scripts and guides will on every call enable staff to take the opportunity to the fullest. blueButler will then give management drill down reports that not only show the metrics in each key performance area being measured, it will allow management to listen to the calls behind each metric right out of the PDF management report. It is this power that will ensure not only that the agency will survive, but that it will flourish.

