

Integrated Call Recording & Reporting Solutions for the Insurance Industry



SonicView™ Call Recording represents how call recording and reporting can be specifically used in the insurance industry today.

With SonicView, insurance agencies can:

- **Manage the Workflow and Understand Call Volumes** – Know who on the team is making and taking the most calls in order to manage staff more efficiently
- **Ensure Compliance, Enhance Training and Optimize Customer Service Satisfaction** – Make sure the team is in compliance with quality control checks; enhance training and coaching methods to optimize the customer experience and resolve any disputes in a timely manner
- **Store Records in a Centralized Location** - Supervisors and managers can access call records anywhere on the network
- **Access, Playback and Share** - Rather than making call recordings available only to branch managers, SonicView creates a report with embedded recording links that management can refer to, playback and share with others
- **Insert Notes into the Call Recording** - Users can annotate calls that can be searched at a later time as needed

Today, Insurance companies are experiencing increased regulation, more compliance standards and a consistent demand to perform. Many of our customers in the insurance space have used **TriVium's SonicView Call Recording & Reporting** to address these issues and accelerate their productivity and profitability.

In recent years, electronic content management (ECM) established the centralization of records. Documents arrive, are scanned and filed. They can then be accessed by auditors, customer service representatives and other authorized users.

That's great for hard copy documents – but what about communications taking place over the telephone?

Many insurance companies use the initial telephone call as the basis of starting a policy origination process; there lies a definitive need for recording such communication. Much of the information is paper-based; however, other aspects of the transaction, such as the initial telephone conversation, calls for additional information and verification checks also need to be documented for total accuracy and transactional transparency.

SonicView offers quality recordings of telephone-based communications, in addition to:

- **Proof-of-Call** – Call recordings prove exactly what was said during telephone conversations to reduce errors and omissions claims
- **Security** – the system is 100% tamper-proof, keeping confidential information secure
- **Extensive Reporting Capabilities** – textual and graphical reports have embedded recording links and can easily be shared within the organization

SonicView works with all business telephone systems, has a user-friendly interface and records calls and stores them in a secure database that is easily searchable. As data, these documents can be incorporated into existing disaster recovery processes.

Ensure Accuracy & Lower the Degree of Risk

Even with well-trained staff, mistakes occasionally happen during insurance conversations over the telephone. A misspelled name, incorrect account number or wrong social security number could easily cause delays in creating policies, completing transactions and force delays in providing answers to a customer's questions or concerns.

When originating and processing policies, the amount of time needed for each transaction contributes to the degree of profitability. And, the more employees need to get involved, the higher the overhead. Inaccuracies in taking down information can result in errors and omissions and can also mean more time spent correcting mistakes, which means more time spent per policy request and fewer total policy requests processed.

Speech Analytics

Speech Analytics enable organizations to identify words and phrases within their audio data to gain valuable intelligence. Users of this solution benefit from improved productivity, rapid response to customer interaction trends, strict adherence to best practices and policies and regulations by all parties involved. This includes reliability and peace of mind for users.

As volumes of call recordings increase, organizations need a reliable method to identify specific information within their call recording database. They also need a fast, accurate and flexible means to retrieve individual recordings or identify the ones that have a defined set of words or phrases to meet a growing range of business needs including compliance, security and business intelligence.

Quality Assurance Checks

Reviewing what is being said by staff is a great tool for understanding what agents are saying to clients and how they are communicating about different products and services. In addition, staff can catch any sales opportunities that may have been otherwise missed.

Train & Coach Staff

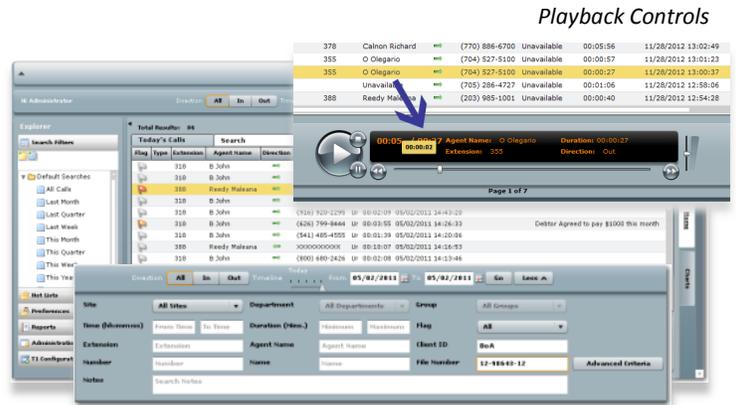
Using SonicView Call Recording & Reporting for training and coaching purposes is an efficient way to listen to playbacks together, discuss call standards and how certain situations should be handled. Product knowledge is key to insurance brokers who carry a variety of insurance types and policies.

Screen Capture

TriVium's Screen Capture option enables an agent's desktop activity to be recorded at the same time the call is being recorded. Watching the screen activity while reviewing the voice conversation allows the supervisor to determine the productivity levels of the agent and the training needs. The playback of the screen recording is done by SonicView and is synchronized with the playback of the call recording.

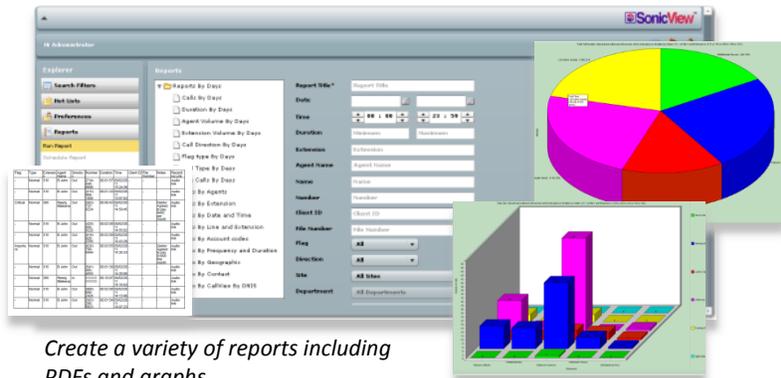


Record, Search and Playback



Top: Call records with playback controls;
Bottom: Advanced search filter

Reports & Report Automation



Create a variety of reports including PDFs and graphs

Screen Capture

Call recordings and screens are captured and synchronized for a 360-degree view of call floor activity



Superior Usability

SonicView Call Recording & Reporting has an intuitive, browser-based interface. It is easy to work with, understand, and customize for specific needs.



www.triviumsys.com

Request a Demo

To schedule a demonstration of SonicView Call Recording, contact us:

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