

# TeleVantage for Insurance Agencies and Brokerages

*Open Systems IP-PBX*

As an insurance professional, your business depends on building strong relationships and responding quickly to the needs of your customers. In an industry where the most important product is peace of mind, every call is significant, from the initial inquiry to the handling of a time-critical emergency – and it is essential that customers be treated as individuals, not just a number.

Consequently, your telephone system can make the difference between success and failure. You need to ensure that callers get fast, accurate and personalized service – helping them quickly reach the appropriate person with minimal effort, and building that essential atmosphere of confidence and trust. Simultaneously, you want the process to be as smooth and efficient as possible for your business operation, with internal communications running seamlessly.

TeleVantage® has earned an outstanding reputation for maximizing efficiency and streamlining operations while dramatically increasing customer satisfaction. TeleVantage lets you provide a friendly and reassuring calling experience to your customers while giving your employees the best call-handling resources available. And the easy-to-use graphical interface allows you to minimize wait time, optimize staffing, and reduce administrative overhead – helping you attain positive results immediately, all with one cost-effective package.



*TeleVantage is a flexible, affordable IP-PBX that enhances customer service, increases productivity and improves the bottom line.*

## The Flexible Solution for Increased Productivity and Customer Satisfaction

*“I am fully confident that TeleVantage has been the lone factor in the increased volume of business that we handle on a daily basis.”*

*Sean Cavin  
Cameron & Roberts Insurance Agency*

### Key Benefits:

- **Manage calls with point-and-click interface**
- **Provide customer-friendly telephone service 24/7**
- **Instantly record and save calls**
- **Distribute incoming calls intelligently**
- **Be accessible anytime, anywhere**
- **Promote your business with enhanced customer services**
- **Unify your messaging**
- **Reduce costly service calls**
- **Integrate with business management software**
- **Maximize productivity with informative reports and call monitoring**
- **Protect today's investment and ensure future flexibility with open systems architecture**

Artisoft's TeleVantage delivers powerful call handling capabilities, on a flexible, open systems architecture that will expand with you as your business grows. TeleVantage offers you unlimited value – improving customer service, increasing productivity and trimming operating expenses. No matter what type of insurance you offer, your business will begin seeing a return on your investment from the very first day.

## Manage calls with point-and-click interface

The easy-to-use graphical interface of TeleVantage makes all of your phone tasks quicker and easier, dramatically improving employees' productivity and saving money right from the start. Your staff can easily manage their calls and voice mail from anywhere. Play (and replay) important voice mail messages first – no more wading through lists or endlessly hitting the pound key. Easily transfer or record calls, grab back a call as the caller is leaving a voice mail message, or set up conference calls with the click of a mouse. To help you juggle multiple calls, TeleVantage lets you see who's calling so that you can make the right choice about which ones to answer. And you simply point-and-click to call your important contacts. No more scrambling for a pen or looking up phone numbers!

## Provide customer-friendly telephone service 24/7

Using a third-party answering service is a major office expense and also makes it difficult to monitor how customer calls are handled after hours. TeleVantage lets you control these calls, eliminating both the added expense and the insecurity of placing your important calls into someone else's hands. Advanced call rules allow you to specify exactly how a call should be routed after-hours, assuring your customers that their call will always reach the right person. And TeleVantage ensures that no emergency call will go unanswered. In addition to calling an escalation list of phone numbers, TeleVantage will keep paging people until someone is reached. This simple, easy-to-use system gives both you and your customers peace of mind.

## Instantly record and save calls

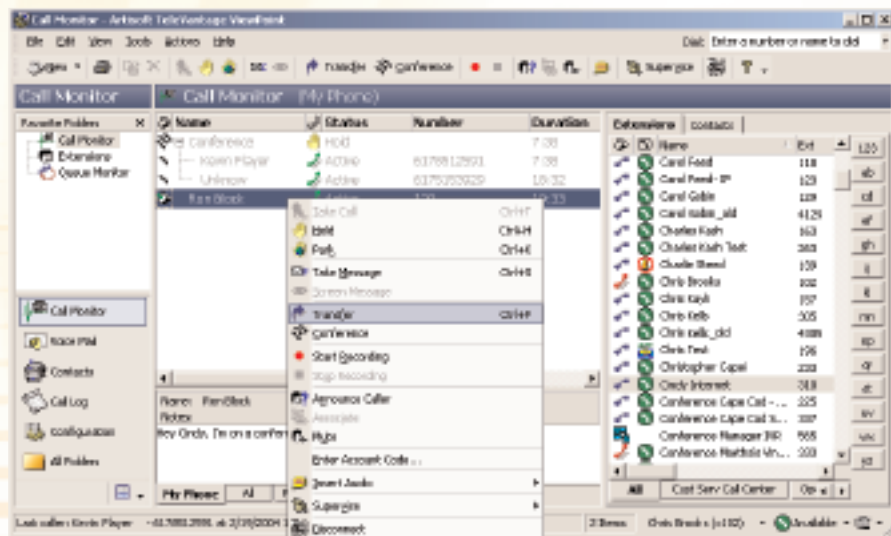
TeleVantage understands that accurate documentation – and the ability to easily retrieve it – is essential to your business. With TeleVantage, you can choose to record all your calls, specific calls or a random number of calls, for quality purposes or to meet legal requirements. You can also point-and-click to instantly record calls in progress, enabling you to save them as electronic files, store them in PC folders for easy reference and retrieval, or share them with other staff. You'll never again have to wonder, "Did I write that down correctly?" or "What did we say about that?" TeleVantage puts all of your important communications at your fingertips, giving you the vital records that can make the critical difference.

## Distribute incoming calls intelligently

To ensure the most efficient service, TeleVantage can automatically route callers to the most appropriate agent based on the product or service they are inquiring about. With TeleVantage, you decide how to distribute incoming calls, so that your office is always working at peak efficiency. Even during the heaviest call periods, no caller is left on hold or turned away, as TeleVantage easily routes overflow calls to a back-up receptionist or automated information system, or provides callers with the option of leaving a message. And if an on hold caller hangs up, TeleVantage keeps a record of the caller's phone number so the call can be returned.

## Be accessible anytime, anywhere

Your customers need to know that they can reach you without dealing with the hassle of a complicated telephone system or the frustration of "telephone tag". With TeleVantage, you no longer need to give out multiple phone numbers and manage multiple messaging systems, eliminating the risks involved in lost and delayed messages. "Follow-Me" call forwarding transparently redirects calls to your cell phone, home, and pager – and if you don't answer, the caller leaves a voice mail message on your TeleVantage system (not your cell phone, home phone, or any of the many systems in between). You can even specify when you want to be accessible and when you want the system to take a voice mail message.



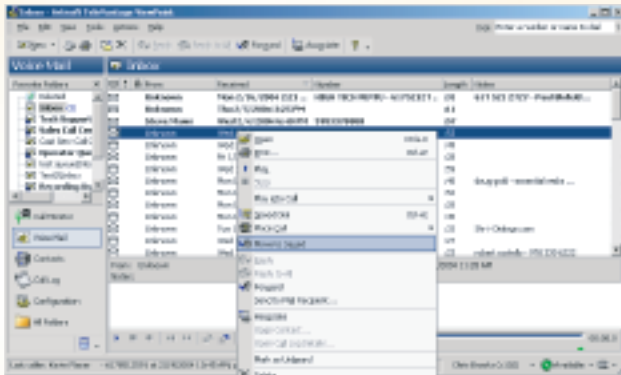
Descriptive Windows-based pull-down menus make it easy to perform any call handling command with the click of a mouse.

## Promote your business with enhanced customer services

Your relationships with your customer are what set you apart from the competition. TeleVantage lets you offer tailored and personalized service, showing your customers that you care. Play various greetings based on the number dialed, reinforcing messages from ad campaigns. Give VIPs special treatment by directing their calls to particular agents, moving them to the front of the hold queue, or by having customized voice mail greetings or status updates ready for them whenever they call. With satisfied customers and the best business tools, more business is sure to follow!

## Unify your messaging

TeleVantage helps integrate voice mail and e-mail so that each employee can work the way they're most efficient. Users can easily retrieve and play back voice mail messages remotely, receive voice mail messages through their e-mail system, or have the system notify them by e-mail or



*The easy to use PC interface lets you prioritize your voice mail, record and archive important messages and quickly access your call history - all with a point-and-click.*

pager when urgent voice messages come in. They can also store voice mail messages as electronic files or send them as e-mail attachments to anyone, inside or outside the company.

## Reduce costly service calls

When so much of your company's time is spent on the phone, you can't afford delays or downtime waiting for an outside service technician to update your phone system. With TeleVantage, there's no need for service calls that put a dent in your budget and your time! The graphical administrator interface enables your in-house staff to intuitively and easily update and maintain the system from any PC on the network, accommodating staffing changes and eliminating system downtime and expensive service fees.

## Integrate with business management software

The open architecture of TeleVantage easily and seamlessly integrates with third-party software applications. From handling daily incoming calls to large-scale marketing campaigns, TeleVantage can serve as an extension of your business databases to help speed up your workflow and

provide innovative customer service features. When a call comes in, a screen pop-up can immediately display important caller information, enabling your telephone service and sales teams to answer the call more intelligently and efficiently, and with the personal touch.

## Maximize productivity with informative reports and call monitoring

Communications is the core of your business. Questions answered incorrectly, repeated transfers, or a long time on hold can frustrate customers and reflect poorly on your company, resulting in lost business. TeleVantage helps you maximize the service you offer, turning your phone into a strategic business tool. Detailed real-time reports on call volume and trends, the number of calls dropped or put on hold, and time spent on calls help you to optimize your staffing resources. Similarly, a supervisor can monitor calls in progress, join calls, or coach an agent in real time without being heard by the customer. Use the system's reporting, monitoring and coaching features to measure and improve your business communications – they will give you a powerful edge over the competition.

*"TeleVantage has increased our productivity by 30%, maybe even more."*

*Marc Roth, Home Warranty of America*

## Protect today's investment and ensure future flexibility with open systems architecture

With your staff performing a wide range of functions in a variety of locations, your office phone system needs to be able to work with the widest array of options. TeleVantage lets you choose the phones that best meet your needs today, from wired desk phones to high-end speaker-phones to mobile cordless headsets, and then change as your business evolves. No more getting locked into a single vendor, style of phone, or business process – TeleVantage easily accommodates your working style, your staffing and your changes, today and tomorrow. Because of its highly configurable functionality, advanced open software architecture and periodic software updates, TeleVantage never becomes obsolete. Like your business, it just keeps getting better over time.

## TeleVantage Features

### Complete software-based phone system

- Full PBX functionality
- Phones stay up during power or server failure
- Built-in extended 911 service
- RAID drives and UPS support
- All trunk types supported (Analog, BRI, T-1, E-1, ISDN PRI/CAS, Internet)
- Expandable to 288 trunks, 720 stations
- Analog, digital, IP phones
- Built-in IVR Toolkit
- Multiple music on hold sources

### Powerful call control

- Voice guided multi-lingual telephone interface
- Easy Windows-based desktop interface
- Cross-platform web browser interface
- Screen calls with PC or phone
- Visual multi-line call handling
- Caller ID display on PC or CLASS phones
- Drag-and-drop transfers and conferences
- One-click conference on call waiting
- High density (up to 60 party) conference calls
- Grab and hold ringing calls
- Park / unpark calls
- Ringback for calls left on hold or parked
- Pick up calls within workgroup or company
- Extensions pane with user "on phone" status
- Personal Call Log with notes
- Customizable ring patterns for call types
- Automated call handling by personal status
- Do Not Disturb, Out of the Office and other custom statuses
- Automated busy handling and camp on
- Intercom and paging through phones
- Whisper announce
- Hot line automatic off hook calling

### Full-featured voice mail

- Visual voice mail display with caller name
- Click to reply, forward, or call back a message
- Export to .WAV file
- Password security, enforceable rules
- Screen messages as they're being left
- Pull callers out of voice mail
- Bookmark important sections of long messages
- Callers can specify callback number
- Multiple personal greetings
- Personalized greetings for special callers or dates / times
- E-mail/pager/call out notification of new messages
- Voice mail delivered to unified e-mail inbox
- Microsoft Exchange synchronization
- Urgent and private message flags
- Remote access via phone or Web browser
- Auto-delete old messages
- Custom, sharable message folders

- Adjustable maximum message length
- Message waiting light
- Stutter dial tone to indicate new messages
- Automatic dialing to return call

### Integrated contact management

- Company, workgroup and personal contacts
- Contact identification w/o requiring caller ID
- One-click dialing
- Use existing contact databases
- Custom shareable contact folders
- Custom call routing and greetings by contact
- Screen-pops for contact calls
- Change language based on contact
- Predefine account codes per contact
- Act!, Outlook, Goldmine, FrontOffice support

### "Follow-me" call forwarding

- Easily route calls to multiple internal or external locations
- One-key forwarding to where you are
- Forward calls differently by caller or personal status
- Screen forwarded calls using verbal prompts
- Password-protect forwarded calls

### Multi-level auto attendants

- Automated or receptionist answering
- Extension dialing or DID
- Dial-by-name directory
- Schedulable greetings and routing for holidays and off-hours
- Record or import greetings and menu prompts
- Caller choices can deliver custom data to agent screen pops or change language (e.g. Spanish)
- English (US and UK), Spanish, French (Parisian and Canadian) and German language support
- Timeout routing to any extension or attendant
- Auto fax detection and routing

### Point and click administration

- Windows-based administration from any location on the network
- Software-based trunk setup
- Device Monitor for real-time trunk/station status
- Comprehensive exportable call log
- Public and personal workgroups
- Easily add, delete and modify users
- Individual or role-based permissions
- Multiple tenant or department support
- Dialing and feature restrictions
- Account codes: forced, verified or optional
- Configurable routing services for least cost routing
- Trunk usage reports
- Monitor use of system space and resources
- E-mail notification of alerts, special events
- Context sensitive help, on-line manuals

### Internet ready

- Easy-to-use Internet trunks and dialing services
- Standard H.323 VoIP support
- IP Gateways tie distant Servers together
- Call local numbers from remote servers
- Microsoft NetMeeting "Click to call" support
- Phone support

### Remote access from anywhere

- Complete visual access via Web browser
- Graphical call control for remote, cell, IP phones
- Phone login for voice mail and account setup
- Remote call screening
- Change greeting, forwarding and personal status from any phone

### Comprehensive call center

- Single-point access to create and manage queues
- Call distribution based on agent performance, top down, round robin, simultaneous ring
- Redirect calls if queue is too busy
- Inbound / Outbound/ Blended queues
- Coaching and monitoring to train new agents
- Real-time agent and queue statistics
- Full-featured Call Center Reporter based on Microsoft Excel
- Automatic call recording by queue or agent
- Multiple, threshold driven hold prompts
- Bail out options to voicemail, or any extension
- Priority routing for important callers
- Multi-tier overflow agents
- Individualized agent and supervisor permissions
- Queue sign in / out, break, unavailable status
- Customizable wrap-up time per agent

### Extendable, open, standards-based

- Easy software-only upgrades
- MAPI and SMTP e-mail support
- TAPI service provider support
- SMDR interface support
- SQL Server database
- COM-based SDK for custom add-ons and IVR development
- Extendable user menus and toolbar

### Minimum server requirements:

- Pentium 400 MHz PC
- 256 MB RAM
- Windows 2000 or 2003 Server, Windows 2000 or XP Professional
- Intel Dialogic telephony boards
- Any standard phone: speaker, corded, cordless or CLASS or ADSI feature phone

## About Vertical

Vertical is a leading provider of open systems IP-PBX and call center products that deliver advanced functionality, flexibility, and value to medium-size business, branch offices, and call centers. Vertical's innovative software products have consistently garnered industry recognition, winning more than 35 awards for technical excellence. The company distributes its products and services worldwide through a dedicated and growing channel of authorized resellers. For more information, please call 800-914-9985 or visit our website at [www.vertical.com](http://www.vertical.com).

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## About TeleVantage

TeleVantage is an open systems IP-PBX that delivers unprecedented communications capabilities to medium-size businesses, branch offices and call centers. The flexible software feature set makes it easy to customize and administer, allowing businesses to improve customer service and enhance productivity. Built on industry standards and supported by world-class Intel® technologies, TeleVantage eliminates the need for proprietary hardware, enabling it to grow and evolve as business needs change while maintaining a low cost of ownership.



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