

# Talkument™ for Insurance Agencies

VOICE DOCUMENTATION—AN AGENT OF SUCCESS FOR YOUR OFFICE



## **Insurance providers have made considerable investments in recent years to upgrade their call center technologies.**

Companies now recognize these solutions provide differentiation and competitive advantage over other insurers who view such optimization as simply an expense line. Call recording solutions are at the forefront of these enhancements, helping to improve customer service levels, increase agent efficiency, reduce liability risk and resolve disputes. The insurance industry has benefited greatly from call recordings to verify claimant statements, research claims, train call center staff and maintain records.

Until now, individual agents have been unable to benefit from call recording in the same way as insurer call centers. Call center recording solutions are generally too large and provide functionality that is an inadequate fit for these specific users. Without an appropriate solution, agents collecting information over the phone are forced to rely on traditional hand-written or keyboard-input notes. Talkument, the voice documentation solution from OAISYS®, addresses this need and revolutionizes everyday business practices for the individual insurance agent.

Talkument enables insurance agencies to simply and efficiently document telephone conversations for accuracy and collaboration. Talkument captures digital recordings of authorized users' telephone conversations through its innovative Portable Voice Documentation (PVD) technology. Conversations are captured in their entirety and can be shared with other authorized users to facilitate improved collaboration. The benefits of the Talkument solution to agents, office managers and field personnel are considerable. Talkument users can focus on the conversation itself, versus taking and saving hand-written notes, significantly improving the customer experience and streamlining operational efficiencies.



**Talkument**  
The Leader in Voice Documentation

Consider just one example of how Talkument can greatly benefit an insurance agency office. A recently married customer calls his insurance agent to add his wife to an auto insurance policy. The agent inputs her information into the database and files the change. Upon review, her driver's license number is returned as invalid. Rather than wasting valuable time trying to call the customer back, the agent simply retrieves the call through Talkument's intuitive Microsoft Outlook-style interface, plays it back and realizes he mistakenly transposed two numbers. He sends a secure voice document link to his manager, noting the section of the call where the error occurred

as well as a text note stating what happened. The required change is processed quickly, and without disturbing the customer, simply because the call information was readily available in its original form with 100 percent accuracy.

Talkument's user-friendly interface and advanced search features make voice document retrieval effortless and efficient. The folder organizational structure enables agents to archive all pertinent telephone interactions for a particular client in one folder, such as by customer name, policy number, claim number, etc.

## TALKUMENT FOR INSURANCE PROVIDERS

Twenty years ago, no one could imagine the profound impact electronic documentation of written communications using e-mail would have on business. Now, no one can imagine successfully doing business without it. Talkument delivers these same benefits to phone-based communications.

FEATURE	FUNCTION	BENEFIT
Voice Documentation	Captures phone conversations as voice documents	Permits users to store, search playback and share voice documents with others
Document Sharing	Enables users to share voice documents with other authorized parties	Enhances productivity and collaboration levels through the effortless transfer of information
100 Percent Accuracy	All content is stored in real-time exactly as it happened	Eliminates errors in recollection and transcription
Accessibility	Voice documents can be shared with both internal users and external recipients	Increased efficiency; information no longer needs to be re-sent or repeated
Retention	Voice documents are stored on a secure server and can be archived	Much like email messages, Talkument voice documents can be archived and stored as long as needed
Highlighting	Brings attention to specific portions of voice documents and ties them into comments	Allows recipients to easily listen to specific portions of call without listening to the entire document
Commenting	Insert and associate text comments with a voice document	Adds supplemental information to the voice document to impication and efficiency
Categorization	Voice documents can be sorted into folders for easy management	Lets users easily store and track the voice documents associated with specific customers or policies
Security	Voice documents are securely stored on the Talkument appliance	Users can only access the voice documents or sections they have permission for, and no files are ever actually transferred

For insurance providers, the differentiating factor for why a customer may select one insurer over another can frequently be linked to the customer service experience they receive. Talkument addresses communication and collaboration gaps within the insurance industry, providing access to complete conversation records, improving customer service levels and reducing liability risk, all of which contribute to greater agency profitability.



To find out more about how Talkument can help your company, please call 888.496.9040, or visit us at [www.oaisys.com](http://www.oaisys.com) or [www.talkument.com](http://www.talkument.com).

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