

# 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 Volume** – 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 within 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 Record** - 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 Systems 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 that take place over the telephone?

Many insurance companies use the initial telephone call as the basis to start 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** – 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 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 can 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.

Every piece of information provided by the customer in an insurance transaction also influences the decision making process of the organization, lowering the degree of risk associated with writing policies. SonicView Call Recording & Reporting helps organizations quickly and easily access critical information that was said during telephone conversations to help overcome liability risk.

## 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. The review of telephone calls can also easily be made part of telephone-based employee performance reviews; product knowledge is key to insurance brokers who carry a variety of insurance types and policies.

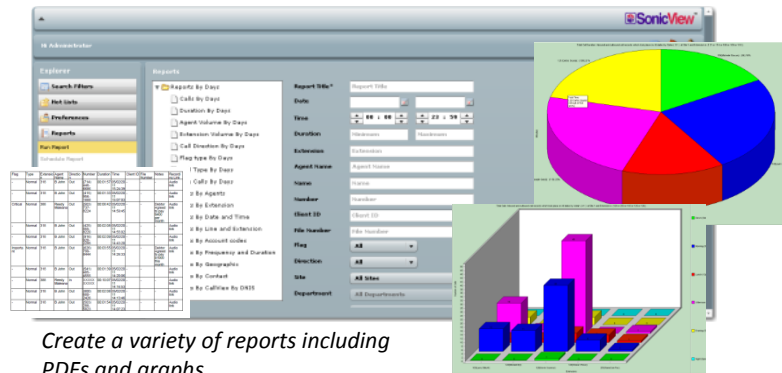
**Superior Usability:** SonicView Call Recording has an intuitive, browser-based Web interface. It is easy to work with, understand, and customize for specific needs.

## RECORD, SEARCH & REPLAY



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

## CUSTOMIZABLE REPORTS



*Create a variety of reports including PDFs and graphs*

## About TriVium Systems, Inc.

Established in 1996, TriVium Systems, Inc. is a leading provider of call recording and reporting solutions for small, medium and large-sized businesses and specializes in the call recording and reporting needs of the insurance industry.

The Company's enterprise-grade solutions are affordably priced and help businesses cut costs, increase productivity, improve quality and enhance security. These solutions provide access and insight into business data that help managers coach and train employees while strategizing and optimizing their bottom line.



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## Request a Demo

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