



# Health Care Insurance Provider

#34

## Situation

The Sales team needed a way to record all appointment calls and transactions in CRM for accurate record keeping.

## Spotlight Software

interAct 3.0 & aWare 3.0

## Integration

MS CRM 4.0, Active Directory LDAP, Cisco CallManager 5.2

## Solution

By integrating interAct 3.0 with MS CRM, they are now able to capture client interaction and automate CRM activity for outbound calls. With the integration of aWare, they are now able to record and capture calls in an on demand mode and auto save those call records in CRM.

## Return on Investment

- Employee productivity increased with click-to-dial from MS-CRM.
- Improved Call Tracking & Automation.
- Hard Dollars saved on recording storage with On-Demand and "look-back" recording features.
- Improved Customer Experience with CRM record delivered on inbound call receipt.
- Quality Management policy in place with aWare call recording and Supervisory functions.
- Regulatory Compliance with call recording records tracked in CRM.
- CRM reports accurately tracking sales activity.
- Improved CRM adoption for new employees.



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