

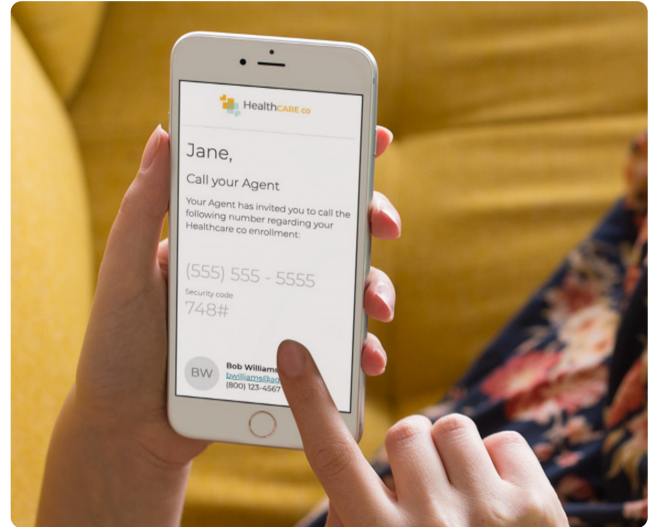
Agent Call Recording

Use Agent Call Recording to record the **Shopping experience, Plan comparisons, Scope of Appointments AND Enrollments.**

Available Options:

1. **Agent Call Recording for SHOPPING** (includes shopping, SOA and enrollment) - Outbound calling only.
2. **Agent Call Recording ENROLLMENT ONLY** - Choice of outbound calling, inbound calling or both.

Once connected via either option above, agents can proceed as they normally would with their customer. Once the call is finished, the recording is available in the member profile for ADMIN users to access and review.



Here is the seamless process for recording calls:

1

For Shopping, Plan Comparisons and SOA: Agent can call the beneficiary for their scheduled appointment (outbound calls).

For Enrollment ONLY interactions: Agent can call the beneficiary (outbound calls) and/or initiate a call by sending a link via an email or text (inbound calls).

2

Call recording information is clearly displayed in the sidebar on the right-hand side of the screen on the platform.

3

Agent takes beneficiary through Scope of Appointment, Shopping and Enrollment. Recordings are linked with beneficiary profile for ADMIN to retrieve and review.

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