

Ooma Office for AgencyZoom

Sell more insurance policies.



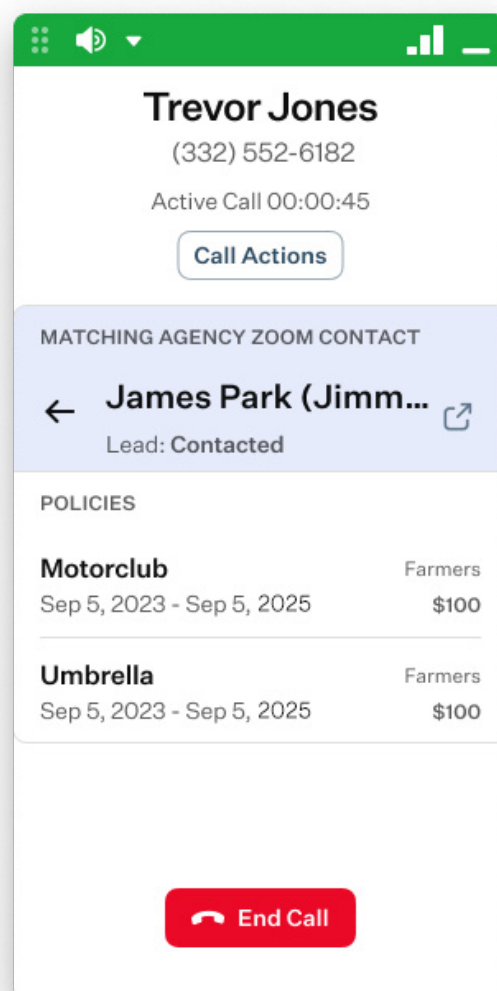
Ooma Office Pro Plus is the comprehensive cloud-based phone system that delivers 100+ advanced tools and features needed to elevate business communications, client service, streamline operations and maximize productivity. Ooma Office Pro Plus customers enjoy many benefits compared to traditional phone carriers:

- Save on phone bills.
- Includes mobile and desktop calling apps.
- Unlimited calling in the U.S., Canada, Mexico and Puerto Rico.
- Easy to install, use and manage.
- Always-on access to 24x7 customer support.

Ooma Office Pro Plus with AgencyZoom helps insurance agencies sell and renew more policies by creating long-term client loyalty.

Insurance agencies that enable the integration benefit from the following features:

- Preview client profiles and policy information when making or receiving phone calls. Client information from AgencyZoom is matched with the caller ID phone number and is automatically displayed without needing to search for the customer record.
- During the call, customer records are easily accessed with a single click.
- Automatically captures every interaction for accurate customer and lead history.
- Send and receive texts through Ooma Office Pro Plus. Conversations are automatically saved and linked to customer files in AgencyZoom.



Take your insurance agency to the highest levels.

Effortless Client Communications – Impress prospects and clients from the first call with a professional virtual receptionist that guides callers to the right agents, employees or departments. Answer common questions like office directions, office hours or how to reach staff after hours.

Stay Connected, Anywhere – Intuitive mobile and desktop apps empower agents and staff to make and receive calls, send and receive text messages, record calls, join videoconferences and send and receive digital faxes from any location.

Instant Client Identification - Caller-ID Pops enable agents and staff to preview client profiles and manage details when taking or making calls. When an agent connects with a client that has a matching record within the AgencyZoom CRM application, a Caller-ID Pop appears on the Ooma desktop showing detailed client information including customer name, policy descriptions, policy start/end dates and policy costs. For prospect calls, the Caller-ID Pop displays lead status with a list of insurance sales opportunities.

Complete Call Control - Staff can mute themselves, put the call on hold, add a call participant, transfer the call, or seamlessly flip the call to another device such as a mobile phone.

Meet Anytime - Meet virtually with up to 100 participants at any time with audio and videoconferencing.

Call Recording – Record calls automatically or on-demand to maintain high service standards, comply with regulations, coach staff, resolve disputes, and enhance customer satisfaction.

Ring Groups – Set up a simple call center that simultaneously rings employees and employee groups (sales, claims, customer service, admin, etc.) to increase client responsiveness.

Text Messaging Support – Send and receive text messages directly in Ooma Office Pro Plus, with the option to save conversations as notes in the contact's activity history in AgencyZoom.

Accurate History – Automated call logs for matched CRM contacts help ensure accurate customer and lead interaction history.

Take your insurance agency to the next level with Ooma Office Pro Plus for AgencyZoom. Deliver the personalized services that keep clients loyal while streamlining operations and maximizing productivity with a tailored phone system.

Key Ooma Office Pro Plus Features

\$29.95 per month/per user. Applicable taxes and fees are not included.

- | | | |
|-------------------------------|--------------------------------------|---------------------------|
| • 911 Service | • Digital Call Deflection | • One-to-Many Messaging |
| • AgencyZoom Integration | • Digital Fax | • One Toll-free Number |
| • Audio and videoconferencing | • Dynamic Caller ID | • Online Bookings |
| • Call Analytics | • Email Audio Attachments | • Ooma Meetings Recording |
| • Call Park | • Enhanced Call Blocking | • Ring Groups |
| • Call Queuing | • Find Me, Follow Me | • Team Chat |
| • Call Recording | • Google and Office 365 Integrations | • Text Messaging |
| • Call Screening | • Hot Desking | • Transfer Music |
| • Caller Info Match | • Mobile App | • Virtual Receptionist |
| • CRM Integration | • Music On Hold | • Voicemail Transcription |
| • Desktop App | | |

Please visit <https://www.ooma.com/small-business-phone-systems/plans/> to view the complete list of features.

Get started today.

Contact our sales team at 877-920-2371 to learn more about how Ooma Office Pro Plus for AgencyZoom simplifies communications and unlocks the full potential of your insurance practice.