

Amtelco Presents

New Opportunities with
Ellie and Active Insights



amtelco

About This Presentation

This presentation was done live at the NAEO Conference using Amtelco's Web Agent

All of the slides are screen shots of the Web Agent clients used in the presentation

F1 Introducing Ellie Disc 03:01 F2

Welcome to Ellie Intelligent Virtual Agent

Client Number: 22524 Call Status: Fetch

Sandbox 15:4.0

Introducing Ellie High Call Volumes Callback Option Automate With Ellie New Client Behavior Automate Scripting Intelligent Scripting Advanced Scripting Transfer To Live Agent AI LLM AI NLP AI Voice AI Multi-Lingual AI Script Variables Advanced Applications Ellie Benefits Ellie Platform When Is Ellie Available? Additional Opportunities Medical Necessities (866-844-1580)

Ellie Patient Emergency and Equipment Problem Multi-screen Ellie Patient Emergency Single Screen Ellie Equipment Problem Single Screen Ellie Appointments Single Screen Ellie Patient Emergency and Office Message Screen Modes Ellie Shimmer Agent, Multi-Lingual Selection Translated to English Ellie Sage Agent, Multi-Lingual Selection Saved in Selected Language Ellie Male Agent Voice Ash Ellie Male Agent Voice Echo Ellie Female Agent Voice Sage Ellie Female Agent Voice Coral Ellie French Language

Ellie Dutch Language Ellie Permission To Enter

Active Insights Dispatch List Show Information



Introducing Ellie Intelligent Virtual Agent

Designed to Complement Your Contact Center Operations

Ellie is named after Mrs Eleanor Curtin



F1 Introducing Ellie AI Virtual Agent Disc 06:00 F2

☎ 🚗 ↻ ✕

Ellie can help you with high call volumes

Client Number: 22525 Call Status: Fetch

Search... Sandbox **15:00** Introducing Ellie High Call Volumes Callback Option Automate With Ellie New Client Behavior Automate Scripting Intelligent Scripting Advanced Scripting Transfer To Live Agent AI LLM AI NLP AI Voice AI Multi-Lingual AI Script Variables Advanced Applications Ellie Benefits Ellie Platform When Is Ellie Available?

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Active Insights Dispatch List Show Information

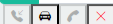


Ellie Intelligent Virtual Agent

Most of you are faced with challenges of overwhelming call volumes at some point each day, increasing caller wait times, and requiring you to increase staff

As we all know staffing is one of our biggest challenges in the contact center industry





Many Of You Get Creative In Handling Large Call Volumes

Client Number: 22526 Call Status: Fetch

Search... Sandbox **15:60** Introducing Ellie High Call Volumes Callback Option Automate With Ellie New Client Behavior Automate Scripting Intelligent Scripting Advanced Scripting Transfer To Live Agent AI LLM AI NLP AI Voice AI Multi-Lingual AI Script Variables Advanced Applications Ellie Benefits Ellie Platform When Is Ellie Available?

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Active Insights Dispatch List Show Information



Ellie Intelligent Virtual Agent

To alleviate long wait times, most of you play auto answer greetings to pacify callers, and may offer callers the option to request a Callback

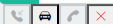
Others may resort to limiting call traffic with DID Limit, System Throttle, or Overflowing to other contact centers



F1 Introducing Ellie AI Virtual Agent

Disc 06:41

F2



Automate Some Of The Calls Your Live Agents Are Handling

Client Number: 22527 Call Status: Fetch

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Active Insights Dispatch List Show Information



Ellie Intelligent Virtual Agent

Automate some of the calls your live agents are currently handling with Ellie Intelligent Virtual Agent

You can choose which calls to direct to the automation and this can even be based on call volumes and wait times



Launch Ellie with a new IS Client Behavior

Client Number: 22528 Call Status: Fetch

Search... Sandbox **IS 6.0** Introducing Ellie High Call Volumes Callback Option Automate With Ellie New Client Behavior Automate Scripting Intelligent Scripting Advanced Scripting Transfer To Live Agent AI LLM AI NLP AI Voice AI Multi-Lingual AI Script Variables Advanced Applications Ellie Benefits Ellie Platform When Is Ellie Available?

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Ellie Intelligent Virtual Agent

Direct callers to Ellie with a new Client Behavior

Automate all calls for certain clients, offer callers the choice for automation via Auto Answer Greeting, or Overflow calls to automation based on call volumes



The screenshot shows the 'Web Supervisor' interface. The main window displays '22528 - Ellie Client Behavior'. On the right, a configuration panel for '70041 - Ellie Medical Necessities (866-844-1586) (Multi-screen)' is visible, showing options for 'Default', 'Scheduled', and 'Override' behaviors. The 'Default' behavior is selected, and the 'Greeting' is set to '<None>'. The interface includes various navigation tabs like 'General', 'Agent', 'Directory', and 'E-mail Accounts'.



Ellie Intelligent Virtual Agent

Ellie Intelligent Virtual Agent automates your existing IS Client Scripts

This is a huge advantage that you don't need to build special call flows for the automated agent

There is a new Script Type called Ellie, allowing you to enable your existing Operator Script as an Ellie Script, or build a special Ellie Callflow Script



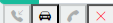
F1

Ellie Intelligent Automation

Disc

07:39

F2



Ellie uses AI to Intelligently Process Your Scripts

Client Number: 22530 Call Status: Fetch

- Search...
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Active Insights Dispatch List Show Information

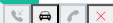


Ellie Intelligent Virtual Agent

Ellie uses AI to intelligently process your scripts

Your IS Client Scripts provide a guideline for the automated call flow, but Ellie understands the entire script, supports screen modes and multiple screens, advanced expressions and dynamic prompting to make the prompts friendly, allows gathering information out of order, and allows callers to ask to repeat all or specific prompts, and to correct information as needed





Utilize all of the integrations, APIs, and Advanced Scripting Functions

Client Number: 22537 Call Status: Fetch

Search... Sandbox **15:00** [Introducing Ellie](#) [High Call Volumes](#) [Callback Option](#) [Automate With Ellie](#) [New Client Behavior](#) [Automate Scripting](#) [Intelligent Scripting](#) [Advanced Scripting](#) [Transfer To Live Agent](#) [AI LLM](#) [AI NLP](#) [AI Voice](#) [AI Multi-Lingual](#) [AI Script Variables](#) [Advanced Applications](#) [Ellie Benefits](#) [Ellie Platform](#) [When Is Ellie Available?](#)

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Ellie Intelligent Virtual Agent

Ellie can perform all of the same advanced Scripting functions, API integrations, advanced expressions, dynamic prompting, and dispatching

Link to Directories, On-Call Schedules, Dispatching, Database Connections, API Connections such as Epic, etc

If a live agent can do it with a Script, so can Ellie



Allow Callers To Move Between Automation and Live Agent Interaction

Client Number: 22531 Call Status: Fetch

Search... Sandbox **15:00** Introducing Ellie High Call Volumes Callback Option Automate With Ellie New Client Behavior Automate Scripting Intelligent Scripting Advanced Scripting Transfer To Live Agent AI LLM AI NLP AI Voice AI Multi-Lingual AI Script Variables Advanced Applications Ellie Benefits Ellie Platform When Is Ellie Available?

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Active Insights Dispatch List Show Information



Ellie Intelligent Virtual Agent

Allow Callers To Move Between Ellie and Live Agent Interaction

Ellie utilizes your existing agent scripts, allowing callers to request to speak to a live agent, and all of the data and the current state of the script is presented to the live agent

The specific request by the caller for assistance will be presented to the live agent as a Park Note, ensuring they are aware of what the caller may need help with

Agents can also hand calls in progress off to Ellie. This could be utilized to provide Post Call Surveys or other followup services

F1

How Does Ellie Work?

Disc
08:33

F2

How Does Ellie Make All Of This Work?

Client Number: 22536 Call Status: Fetch

Search... Sandbox **15 & 0** Introducing Ellie High Call Volumes Callback Option Automate With Ellie New Client Behavior Automate Scripting Intelligent Scripting Advanced Scripting Transfer To Live Agent AI LLM AI NLP AI Voice AI Multi-Lingual AI Script Variables Advanced Applications Ellie Benefits Ellie Platform When Is Ellie Available?

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Active Insights

Dispatch List

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Ellie Intelligent Virtual Agent

Ellie processes scripts using AI Large Language Model (LLM) and Small Language Model (SLM)

LLM and SLM provides the knowledge and awareness of how to interact with a caller and basically carry on an intelligent conversation

Ellie provides the context and instructions for how the AI engine should behave, telling it

"You are a helpful, witty, and friendly AI. Act like a human, but remember that you aren't a human and that you can't do human things in the real world. Your voice and personality should be warm and engaging, with a lively and playful tone. If interacting in a non-English language, start by using the standard accent or dialect familiar to the user.

Talk quickly."



How Does Ellie Understand What Callers Say Using NLP?

Client Number: 22539 Call Status: Fetch

Search... Sandbox **15 60** [Introducing Ellie](#) [High Call Volumes](#) [Callback Option](#) [Automate With Ellie](#) [New Client Behavior](#) [Automate Scripting](#) [Intelligent Scripting](#) [Advanced Scripting](#) [Transfer To Live Agent](#) [AI LLM](#) [AI NLP](#) [AI Voice](#) [AI Multi-Lingual](#) [AI Script Variables](#) [Advanced Applications](#) [Ellie Benefits](#) [Ellie Platform](#) [When Is Ellie Available?](#)

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Ellie Intelligent Virtual Agent

Ellie intelligently processes scripts using AI Natural Language Processing (NLP)

NLP allows callers to speak like they are talking to another person using sentences and other natural responses

This is a dramatic improvement over traditional IVR platforms which are command driven

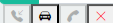


F1

Ellie Multiple Voice Options

Disc
10:09

F2



Ellie Allows Configuring The Preferred Automated Voice

Client Number: 22541 Call Status: Fetch

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Active Insights Dispatch List Show Information



Ellie Intelligent Virtual Agent

The Ellie AI engine supports multiple Agent Voices

This allows you to choose your preferred Ellie Agent Voice for each client

There are multiple Female and Male voices available



Does Ellie Understand Multiple Languages?

Client Number: 22540 Call Status: Fetch

Search... Sandbox **15 & 0** [Introducing Ellie](#) [High Call Volumes](#) [Callback Option](#) [Automate With Ellie](#) [New Client Behavior](#) [Automate Scripting](#) [Intelligent Scripting](#) [Advanced Scripting](#) [Transfer To Live Agent](#) [AI LLM](#) [AI NLP](#) [AI Voice](#) [AI Multi-Lingual](#) [AI Script Variables](#) [Advanced Applications](#) [Ellie Benefits](#) [Ellie Platform](#) [When Is Ellie Available?](#)

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Ellie Intelligent Virtual Agent

The Ellie AI engine supports multiple languages

Set a client to a specific language or prompt the caller for their language preference

This allows you to have a script written in English, and Ellie can interact with the caller in another language, with the message saved in English

We are also exploring options to save the script message contents in the spoken language, or specifying the language to save the text in

Languages:

Afrikaans, Arabic, Armenian, Azerbaijani, Belarusian, Bosnian, Bulgarian, Catalan, Chinese, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, Galician, German, Greek, Hebrew, Hindi, Hungarian, Icelandic, Indonesian, Italian, Japanese, Kannada, Kazakh, Korean, Latvian, Lithuanian, Macedonian, Malay, Marathi, Maori, Nepali, Norwegian, Persian, Polish, Portuguese, Romanian, Russian, Serbian, Slovak, Slovenian, Spanish, Swahili, Swedish, Tagalog, Tamil, Thai, Turkish, Ukrainian, Urdu, Vietnamese, and Welsh.

Control Ellie Functions with Script Fields

Client Number: 22542 Call Status: Fetch

Search... Sandbox **IS 6.0** Introducing Ellie High Call Volumes Callback Option Automate With Ellie New Client Behavior Automate Scripting Intelligent Scripting Advanced Scripting Transfer To Live Agent AI LLM AI NLP AI Voice AI Multi-Lingual AI Script Variables Advanced Applications Ellie Benefits Ellie Platform When Is Ellie Available?

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Active Insights Dispatch List Show Information



Introducing Ellie Intelligent Virtual Agent

Easily Control Ellie options with Script Fields

Ellie_Voice - Allows specifying the preferred Voice for this client

Ellie_Language - Allows specifying the preferred language(s) for this client

Ellie_Greeting - Allows specifying an initial Greeting to play to the callers

Ellie_Message_Language - Allows specifying the Language to save the message in (being developed)

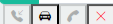


F1

Ellie Advanced Applications

Disc 10:47

F2



Utilize Ellie for Advanced Automated Applications

Client Number: 22538 Call Status: Fetch

- Search...
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Active Insights Dispatch List Show Information



Ellie Intelligent Virtual Agent

Ellie can provide Advanced Automated Applications

Utilize Ellie for Advanced Inbound applications such as Script Driven calls, Just Say It Directory Assistance, Medical Clinic calls, Trouble Tickets and Service Requests, Property Management, HVAC, Appointment Confirmations, Appointment Booking, Post Call Surveys, etc

Utilize Ellie for Advanced Outbound applications such as Surveys, Appointment Reminders, Outbound Interactive Dispatching, Overhead Paging, etc



Disc 11:17

F2

What Are The Benefits Of Ellie for your business?

Client Number: 22532 Call Status: Fetch

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Active Insights Dispatch List Show Information



Benefits of Ellie Intelligent Virtual Agent

Ellie can handle call traffic when your agents cannot

Increase customer retention and revenue by handling more calls

Increase caller satisfaction by lowering wait times and completing calls faster

Collect repetitious information, i.e. Name/DOB from your callers with Ellie and present the call with information collected to your live agent to confirm and collect more

Get new accounts looking to start with automation and then upsell your live agent staff to them

Ellie helps streamline your workforce scheduling, she is your extra operator at all times for those accounts that have said yes please have Ellie take my calls when your agents are experiencing a rush in call traffic

Your business has been built on live agent services and Ellie is here to help your clients when they call in so the live agents can be taking more calls and messages for your clients

Increase your customer positive experience by helping them right away while continually building your business



What Is The Ellie AI Virtual Agent Platform?

Client Number: 22533 Call Status: Fetch

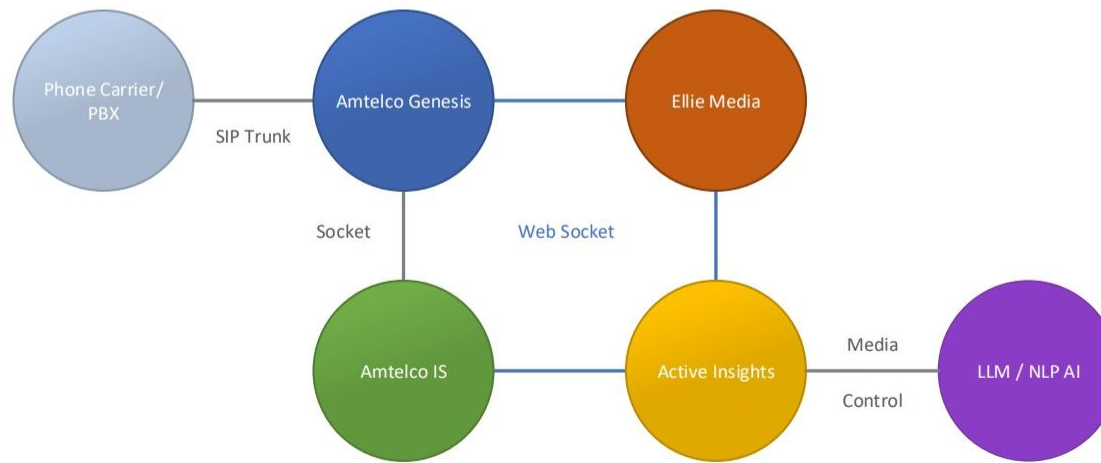
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Active Insights Dispatch List Show Information



Ellie AI Virtual Agent Platform runs on Amtelco IS 6.0, Genesis, and Active Insights

Ellie Connection to IS Genesis



F1 When Will Ellie Be Available? Disc 11:41 F2

When Will Ellie AI Automated Agent Be Available?

Client Number: 22534 Call Status: Fetch

Search... Sandbox **IS 6.0** Introducing Ellie High Call Volumes Callback Option Automate With Ellie New Client Behavior Automate Scripting Intelligent Scripting Advanced Scripting Transfer To Live Agent AI LLM AI NLP AI Voice AI Multi-Lingual AI Script Variables Advanced Applications Ellie Benefits Ellie Platform When Is Ellie Available?

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Ellie Intelligent Virtual Agent

When Will Ellie Integrated Virtual Agent Be Available To You?

Ellie Integrated Virtual Agent is part of our new IS 6.0 release. This release is targeted for availability to customers in the second quarter 2025.



What additional opportunities may be available with AI and Ellie?

Client Number: 22535 Call Status: Fetch

Search... Sandbox **15 & 0** [Introducing Ellie](#) [High Call Volumes](#) [Callback Option](#) [Automate With Ellie](#) [New Client Behavior](#) [Automate Scripting](#) [Intelligent Scripting](#) [Advanced Scripting](#) [Transfer To Live Agent](#) [AI LLM](#) [AI NLP](#) [AI Voice](#) [AI Multi-Lingual](#) [AI Script Variables](#) [Advanced Applications](#) [Ellie Benefits](#) [Ellie Platform](#) [When Is Ellie Available?](#)

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Ellie Intelligent Virtual Agent

What additional opportunities are available with Ellie and Active Insights?

Active Insights AI Call Scoring and Sentiment Analysis (available now)

Real Time Transcription (show transcription to agent)

Agent Co-Pilot and Knowledge Assist

Enhanced Text To Speech

SMS Text Chat BOT and Web Chat BOT

Automated Language Translation (stand alone)

Automated Language Translation (co-pilot)

Much More...

Welcome to Active Insights Cloud Archival and Analytics solution

Client Number: 2251 Call Status: Fetch Open Messages: 15

- Sandbox
- Introducing Active Insights
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- Caller History
- Ellie
- Medical Necessities (866-844-1586)

- Active Insights
- Dispatch List
- Show Information

Introducing Active Insights



Use Active Insights as your next-gen Archival, Long-term Storage, AI Agent Call Scoring, AI Caller Sentiment Analysis, AI Client Revenue Opportunity Analysis, Dashboard, and Reporting solution

Active Insights is also the foundation for Amtelco's new Ellie Intelligent Virtual Agent

F1 Active Insights Customers Disc 00:22 F2

Active Insights Customers

Client Number: 22514 Call Status: Fetch Open Messages: 15

Search... Sandbox

[Introducing Active Insights](#)
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[Ellie](#)

[Medical Necessities \(866-844-1586\)](#)

Active Insights x Dispatch List x Show Information x

Active Insights Customers



Amtelco is excited to update you on the incredible progress that has taken place over the last two years with the innovative Active Insights platform

Thanks to the hard work and great feedback we received from our customers,
 Active Insights is now live at 22 customers with more coming on board each month
 We have customers running in AWS US East Region 2 and Canada Region, with a backup in US East 1

Disc 00:35

F2

Introducing Amtelco's New Active Insights Cloud Platform

Client Number: 22516 Call Status: Fetch Open Messages: 15

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Active Insights Cloud Platform



Active Insights is a **Cloud-based SaaS** solution that connects to your Amtelco IS system

Active Insights is deployed at **AWS** with **Multi-zone** and **Multi-region** Failover

IS will queue up data for Active Insights if it goes offline

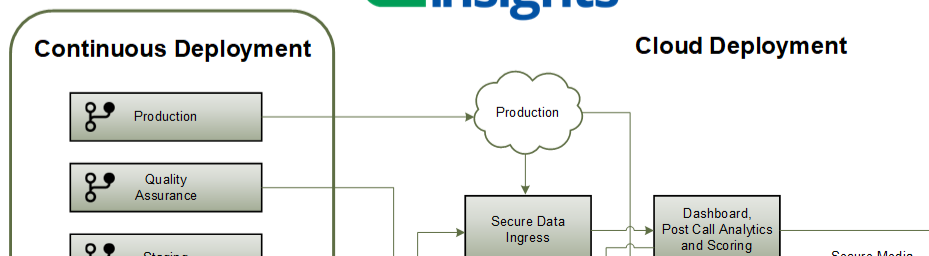
Active Insights is compatible with **IS release 5.5** (requires Genesis 6.6)

Active Insights provides **Continuous Deployments**

Continuous Deployments can be done with **Zero System Downtime!**

Continuous Deployments are **Very Low Risk!** to your core call processing

Continuous Deployments allow Amtelco to develop and release software **Much Faster**



Amtelco Active Insights Security and HIPAA Compliance

Client Number: 22518 Call Status: Fetch Open Messages: 15

Search... Sandbox

Introducing Active Insights Customers Platform Security Base Package Archive Filters Transcription AI Call Scoring AI Sentiment AI Accuracy AI Revenue Code Call Scoring Transfer Center Scoring Dashboard Agent Dashboard Reporting Exporting Export to PDF Caller History Ellie

Medical Necessities (866-844-1586)

Active Insights x Dispatch List x Show Information x

Active Insights Security and HIPAA Compliance



Active Insights is **Secure** and **HIPAA Compliant**

Active Insights data is stored in a **Secured S3 Bucket** and **PostGres database** isolated by customer

Each customers data is protected with a unique **Customer ID** and **API Key**

Access to Active Insights is controlled via **Secure Login Authentication**

Active Insights data is fully **Encrypted** at Rest and in Transit

Security and **Vulnerability Scanning** is built in as part of Active Insights

Amtelco has a **HIPAA BAA** in place with **Amazon and OpenAI**

Amtelco is performing an **Annual HIPAA Risk Assessment** on Active Insights

Active Insights now supports **SSO**

Active Insights Base Package



Every customer who signs up for Active Insights gets the following modules

1 Terabyte of Storage

Automated Archival for Messages, Call Logs, Screen Captures, Call End Statistics, Call Tracker, Script Tracker, and more

Advanced Dynamic and Interactive Dashboard

Advanced Web Based Reporting

Active Insights Archival



Every customer gets Automated Archival for Messages, Call Logs, Screen Captures, Call End Statistics, Call Tracker, Script Tracker, and more

Automatically Archives as each Call and Message are taken

Allows setting your Retention time in IS low

Reduces the size of your IS SQL database

Dynamic Filters to Quickly Locate Data

Export Your Messages and Other Data

Introducing Amtelco's Active Insights Advanced Filters to Quickly Locate Information

Client Number: 225212 Call Status: Fetch Open Messages: 15

Search... Sandbox

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- Customers
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Medical Necessities (866-844-1586)

Active Insights Filters



Advanced Filters allow locating Calls and Messages very quickly
 Advanced Filters allow dynamically adjusting what to view in the Dashboard
 Advanced Filters allow dynamically choosing what to generate for Reports

Filter on Datetime, Client, Agent, Skill, ANI, CallID, Duration, Answer Time, Message Contents, Transcription Contents, and much more
 Create Multiple Filters

The screenshot shows the 'Calls' section of the Active Insights application. At the top, there is a navigation bar with the 'ai' logo and menu items: Configuration, Usage, Reports, Dashboard, Call Logs, and Messages. Below this, the 'Calls' title is displayed. A filter bar contains three active filters: 'Media Audio, Transcript', 'Client Medical Necessities (866-844-1586)', and 'Date Last 20 weeks'. A 'Saved Searches' dropdown is also visible. Below the filters is a search input field with the text 'Search:' and a clear 'X' button. At the bottom, a table header for 'ANI' is partially visible, along with an 'export' button.

Thank you for calling the Active Insights Transcription center

Client Number: 225123 Call Status: Fetch Open Messages: 15

- Search...
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Medical Necessities (866-844-1586)

- Active Insights
- Dispatch List
- Show Information

Active Insights Call Transcription



Customers can choose to Automatically Transcribe Call Log Recordings into Text

Enable Transcription per Client or Agent

Set Transcription Hours and Percentages per Client or Agent

Transcription Diarization Breaks Text Up Into Which Party Was Speaking

Show Call Login IS Supervisor

staging.amtelcoservices.com/portal/call_logs/3530790?return_url=%2Fportal%2Fcall_logs%3Fpage%3D2%26search-stamp-between-start%3D6%252F1%252F2024%26search-stamp-between-end%3D8%252F31%252F2024%26search-media-match-has_transcript%3Dtrue%26se...

Web Agent miTeamWeb Active Insights Web Supervisor Backup Web Agent Innovation Machine... MSM Admin New

Configuration Usage Reports Dashboard Call Logs Messages

Call Information

Necessities. How may I help you? Hi, this is Amanda Smith. I'm calling in regards to my son Bobby. Ok. And then may I have your call back number, please? Amanda. It's 6082126363. All right, perfect. Sorry, Amanda. I'm having a little bit. There we go. Ok. So that was 6082126363. Correct? Perfect. All right. Let me go ahead and pull up your information here and you said your name was Bobby, correct? And then is his last name also Smith, correct? Ok. And then what is his date of birth? It's February 23rd, 2017. All right. So I have February 23rd 2017. Correct? Ok. And then are you his parent or guardian? Yes. Ok. And then has he been seen at our clinic before? Yes. And then is he having any pain, swelling or bleeding? Uh He is having pain in his uh right leg, his right leg. Ok. All right. I will go ahead and put this in and have one of our on call doctors. Give you a call back. Great. Thank you. So much. Thank you. Bye bye.

Jessy 3.41

Necessities. How may I help you?

Active Insights Analytics and Call Scoring



Customers can choose to Automatically perform Analytics and Call Scoring on the Call Data and Transcription

Automate your Agent Assessments and Evaluations

Eliminate the need to manually assess calls

Build Scripts to Score Calls

Use AI to Score Calls Based on Natural Language Prompts

Evaluate and Score calls differently for different types of calls (Service Calls, Sales Calls, Code Calls, Transfer Center Calls, etc)

Use Industry KPI and Award of Excellence Scoring Criteria

Amtelco provides the Scoring scripts and works with you to tailor to your needs


Edit Individual Call Scores as needed

Thank you for calling Active Insights Analytics and Call Scoring


Client Number: 22512 Call Status: Fetch Open Messages: 15


- Search...
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Medical Necessities (866-844-1586)


 **Caller Sentiment Trend**
The caller started with an emergency but ended the call in anger after the agent refused to assist.

 **Total Score**
8/40 - 20%

 **Answer Phrase**
3/5 The agent's greeting was polite but did not match the exact answer phrase provided.

 **CSR Attitude**
0/5 The agent expressed a lack of willingness to help, which negatively affected the caller's experience.

 **CSR Call Outcome**
0/5 The agent was not able to meet the caller's needs, leading to a negative outcome.

 **CSR Confidence**
0/5 The agent did not sound confident or knowledgeable about how to handle the caller's needs.

 **CSR Engagement**
0/5 The agent sounded mechanical and did not engage with the caller.

 **CSR Grammar**
5/5 The agent used proper business phrasing throughout the call.

 **CSR Message Handling**
0/5 The agent did not handle the caller's message or situation appropriately.

 **Caller Sentiment Score**
0/5 The caller's sentiment worsened during the call leading to anger.

Messages ▾

Call Events ▾

Start time: 08/29/2024 01:45:28 PM

Call Type: Secretarial

Duration: 000:00:56

Determine if callers are satisfied with the outcome of each call

Client Number: 225121 Call Status: Fetch Open Messages: 15

Search... Sandbox

Introducing Active Insights Customers Platform Security Base Package Archive Filters Transcription AI Call Scoring AI Sentiment AI Accuracy AI Revenue Code Call Scoring Transfer Center Scoring Dashboard Agent Dashboard Reporting Exporting Export to PDF Caller History Ellie

Medical Necessities (866-844-1586)

Active Insights Dispatch List Show Information

Active Insights AI Caller Sentiment



Use AI to Determine **Caller Sentiment**

Use AI to Determine if the Caller Sentiment is Trending Negative, Neutral, or Positive

Use AI to Determine if the Caller is Angry

Use AI to Generate a Warning if the Caller is Angry

Use AI to Mark Calls for Review Based on Caller Sentiment

Use AI to Initiate Emails and MergeComm Jobs Based on Caller Sentiment

Live call analytics and agent assistance | Active Insights

staging.amtelcoservices.com/portal/call_logs/3522138?return_url=%2Fportal%2Fcall_logs

Web Agent miTeamWeb Active Insights Web Supervisor

ACTIVE Insights Configuration Usage Reports Dashboard Call Logs Messages

Call Information

Call Menu

Talk 00:03:03 - 96.84%

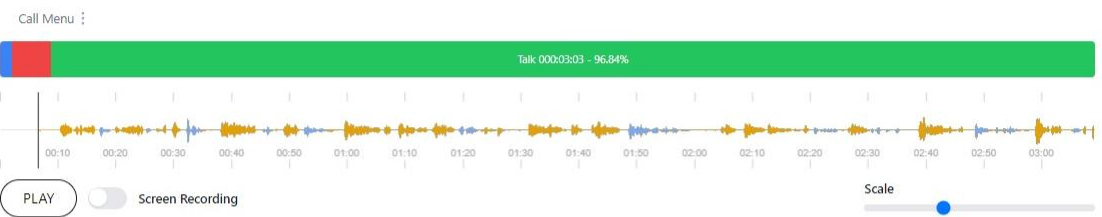
00:10 00:20 00:30 00:40 00:50 01:00 01:10 01:20 01:30 01:40 01:50 02:00 02:10 02:20 02:30 02:40 02:50 03:00

PLAY Screen Recording Scale

Determine if callers are satisfied with the outcome of each call

Client Number: 225121 Call Status: Fetch Open Messages: 15

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Post Call Scoring [view logs](#)

Caller Angry
The caller became angry because they were frustrated with having to repeatedly call about the equipment problem and felt that it was affecting patient safety.

Summary
Summary: The caller, Pat Dye, is calling about an ongoing equipment problem with a portable concentrator. The agent informs the caller that portable concentrator calls cannot be handled after hours and will be passed on to the office for attention in the morning. The caller expresses frustration as they have called multiple times about the issue, highlighting concerns about patient safety. The agent apologizes and gathers information about the patient and the problem. The caller requests expedited assistance, expressing dissatisfaction with the situation. The call ends with the agent offering to pass along the information and the caller waiting for a call back. Caller sentiment: Dissatisfied

Caller Sentiment Trend
The caller started with a negative sentiment and remained dissatisfied throughout the call due to the agent's inability to address the issue.

Answer Phrase
5/5 The agent greeted the caller accurately and politely, confirming the caller's name and phone number.

CSR Attitude
3/5 The agent remained helpful and composed for the most part, but became flustered and seemed unsure during the call.

CSR Call Outcome
3/5 The CSR remained mostly helpful and composed throughout the call, but did not effectively address the caller's concerns and was unable to pass the urgent issue with the portable concentrator to the appropriate department after hours.

CSR Confidence
5/5 The agent demonstrated knowledge of the caller's account by confirming their name, phone number, and previous calls. The agent also accurately determined the type of equipment and informed the caller about the after-hours policy. Although the agent was unable to assist with the issue, they remained

Determine if the data gathered is accurate for each call

Client Number: 2251211 Call Status: Fetch Open Messages: 15

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Medical Necessities (866-844-1586)

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Active Insights AI Accuracy and Actions



Use AI to Validate Data Entered into a Message Versus What Was Said (phone numbers, etc)

Use AI to Determine if the Agent Accurately Recited the Answer Phrase

Use AI to Initiate Emails and MergeComm Jobs if There is a Problem

Use AI to Evaluate Problem Resolution (Field Service)

Use AI to Evaluate Anything Else You Can Think Of...

The screenshot shows a browser window with the URL `staging.amtelcoservices.com/portal/call_logs/3522138?return_url=%2Fportal%2Fcall_logs`. The page title is "Call Information". It features a "Call Menu" bar with a red segment and a green segment labeled "Talk 00:03:03 - 96.84%". Below this is an audio waveform player with a "PLAY" button, a "Screen Recording" toggle, and a "Scale" slider. At the bottom, there is a "Post Call Scoring" section with a "view logs" link.

Use Active Insights AI to Generate Additional Revenue Opportunites

Client Number: 225122 Call Status: Fetch Open Messages: 15

- Search...
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Medical Necessities (866-844-1586)

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Active Insights AI Analytics and Revenue Opportunities



Use AI Natural Language queries to evaluate call Transcriptions for **Revenue Opportunities**

AI is used to determine if there are additional services, or upsell opportunities that may benefit the caller or the business based on the call interaction

AI is used to determine if there are business process enhancements that may benefit the business based on the call interaction

Send the opportunities to your clients via Email or MergeComm

What Revenue Opportunites can you think of?

Call Center Sales Lead Opportunities

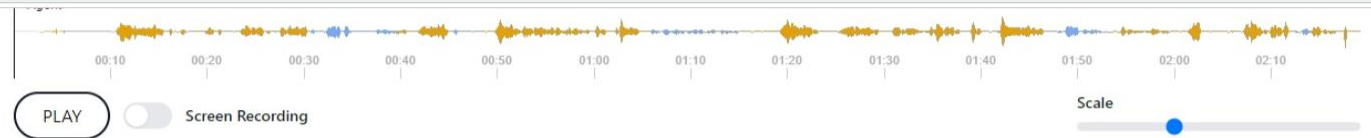
1. Sales Lead - Medical Equipment - Assist with concentrator upgrades.
2. Candidate for Paid Services - Emergency Medical Services - Improve response time.
3. Sales Lead - Maintenance Services - Offer maintenance plans.
4. Candidate for Paid Services - Technical Support Services - Provide 24/7 support.
5. Candidate for Paid Services - Training Services - Offer concentrator usage training.

Use Active Insights AI to Generate Additional Revenue Opportunit

Client Number: 225122 Call Status: Fetch Open Messages: 15

- Search...
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Medical Necessities (866-844-1586)



Post Call Scoring [view logs](#)

- Call Center Sales Lead Opportunities**

1. Sales Lead - Medical Equipment - Assist with concentrator upgrades. 2. Candidate for Paid Services - Emergency Medical Services - Improve response time. 3. Sales Lead - Maintenance Services - Offer maintenance plans. 4. Candidate for Paid Services - Technical Support Services - Provide 24/7 support. 5. Candidate for Paid Services - Training Services - Offer concentrator usage training.
- Check Phone #**

Phone number in the message differs from the phone number in the call transcript.
- Equipment Opportunity**

Enhanced sales opportunities for concentrator upgrades.
- Revenue Opportunity**

1. Cross-sell concentrator accessories. 2. Offer concentrator upgrade packages.
- Service Enhancement Opportunity**

1. Offer equipment maintenance plan. 2. Provide training on concentrator usage. 3. Offer 24/7 technical support.
- Summary**

The call involved the caller, Gloria, from a hospital seeking assistance with a portable concentrator issue. The agent, limited by company policy, was unable to pass vital information after hours. Despite the frustration expressed by the caller, the agent maintained a professional tone and offered alternatives, ultimately ending the call on a polite note with unresolved concerns.

Active Insights AI Transfer Center Scoring



Use AI to automatically analyze and score your **Transfer Center Calls**

Ensure operators answer correctly

Ensure operators gather the required information such as Current Location, Patient, DOB, Diagnosis, etc

Ensure operators gather Specialty and complete transfer request

Show Call Login IS Supervisor

staging.amtelcoservices.com/portal/call_logs/3531841?return_url=%2Fportal%2Fcall_logs

Web Agent miTeamWeb Active Insights Web Supervisor Backup Web Agent Innovation Machine... MSM Admin New

ai **ACTIVE insights**

Configuration Usage Reports Dashboard Call Logs Messages

Call Information

⚠ Transfer Center Summary Complete

➔ Transfer Request Trend
 The agent successfully gathered all necessary information to initiate the patient transfer and confirmed that the request was sent to the neurology

Thank you for calling the Active Insights Interactive Dashboard

Client Number: 22513 Call Status: Fetch Open Messages: 15

- Search...
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Medical Necessities (866-844-1586)

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Active Insights Dashboard



Active Insights provides Dashboard views of your Call Metrics, Call Scores, and Analytics

Reduce the Dashboard burden on the core system functionality

View Dashboard Widgets on Service Levels, Answer Times, Call Duration, Call Scores, Agent and System Abandons, and more

Filter the Dashboard on Agent, Client, Skill, Date and Time

View Service Level, Abandon, and Call Metric Trends Over Time

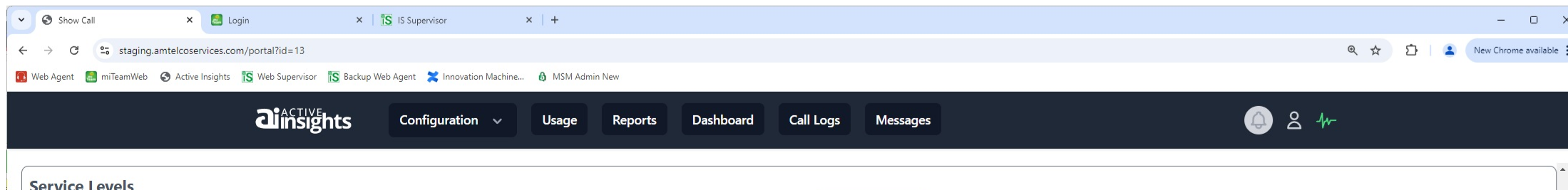
Dashboard widgets are Interactive, allowing you to view the data behind what is being displayed

NEW Multiple Configurable Dashboard Layouts

NEW Web Agent Dashboard

NEW Advanced Abandon Call Analytics

NEW Call Metrics Charts



Thank you for calling the Active Insights Interactive Dashboard

Client Number: 22513 Call Status: Fetch Open Messages: 15

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- Medical Necessities (866-844-1586)

Total Calls ?

68

Calls within Service Level ?

57

Number of calls answered within 20 seconds

Avg. Answer Time ?

000:00:03

Avg. Duration ?

000:01:44

Max Call Duration ?

000:13:25

!

System Abandons ?

8

Calls not on an agent screen !

System Abandons % ?

11.76

Calls not on an agent screen !

System Abandon Call Duration ?

148.75

Avg abandon duration !

System Abandon Time ?

145.25

Avg abandon duration !

Agent Abandons ?

3

Calls on an agent screen !

Agent Abandons % ?

4.41

Calls on an agent screen !

Agent Abandon Wait Time ?

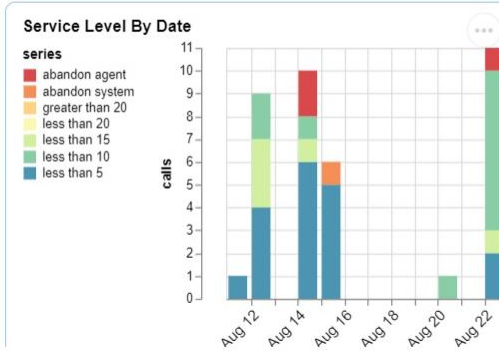
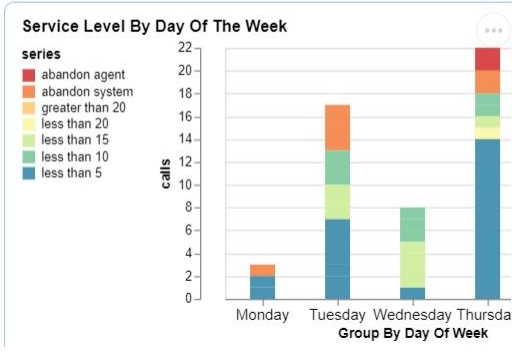
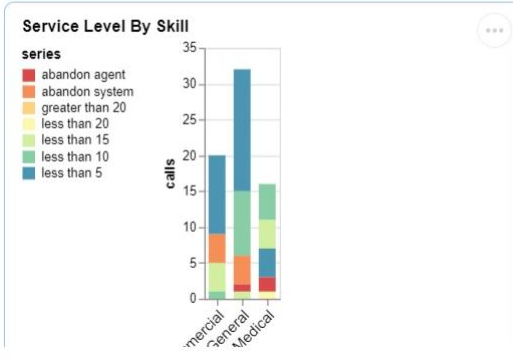
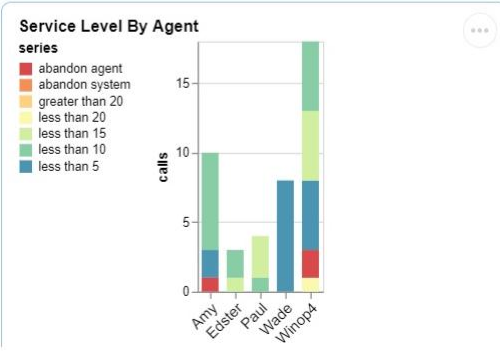
11.00

Avg abandon duration !

Agent Abandon Time ?

6.67

Avg abandon duration !



Empower Your Agents with the Active Insights Agent Dashboard

Client Number: 22517 Call Status: Fetch Open Messages: 15

- Search...
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- Security
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- Archive
- Filters
- Transcription
- AI Call Scoring
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- AI Accuracy
- AI Revenue
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Medical Necessities (866-844-1586)

Active Insights Web Agent Dashboard



Active Insights can provide feedback to your agents in Web Agent during their shift
 Show agents how they are doing with Answer Times, Agent Abandon Count, Call Scores, and more
 Utilize new Startup Action, Keyboard Shortcut, Toolbar Button in IS 5.6
 Automatically Start Web Agent Dashboard On Your Agents Default Client
 Utilize New Configurable Agent Dashboard

2025 - Amtelco Intelligent Series 2025

- Sandbox
- Welcome to NAEO
- Special Tribute
- Beta Sites
- Valuable Resources
- AI Powered Solutions
- Introducing Active Insights
- Introducing Ellie
- Communications Solutions
- Cloud System
- OmniChannel ACD
- ACD Callback
- Reduce Training
- Integrations
- Epic Integrations
- Security
- Message Scripting
- Web Apps
- Web Agent
- Web Supervisor
- miTeamWeb > Amtelco Portal
- Voice Services
- Reliable and Scalable
- Data Migration
- Reporting
- IS 5.5
- IS 5.6
- IS 5.7
- IS 6.0
- SSO
- HA
- Amtelco Secure Messages
- The Power Of Scripting
- Medical Necessities (866-844-1586)

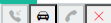
Total Calls **11**

Calls within Service Level **0** Avg. Answer Time **000:00:13** Avg. Duration **002:22:25** Max Call Duration **027:47:22**

Disc 07:53

F2

Active Insights Reporting



Welcome to Active Insights Reporting

Client Number: 22515 Call Status: Fetch Open Messages: 15

- Search...
- Sandbox
- Introducing Active Insights
- Customers
- Platform
- Security
- Base Package
- Archive
- Filters
- Transcription
- AI Call Scoring
- AI Sentiment
- AI Accuracy
- AI Revenue
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- Caller History
- Ellie

Medical Necessities (866-844-1586)

- Active Insights
- Dispatch List
- Show Information

Active Insights Reporting



Active Insights has access to statistical data and can provide Dashboard and Reporting views of the data

Agent Score Report

System Audit Log Report

System Call Metrics Report

System Service Level Report

Group By Agent, Client, Date

Dynamic Filters on Agent, Client, DateTime, Skill, ANI, Duration, CallID, Media, Call Contents, Message Contents, etc

View and Export Report Data

Export Your Active Insights Data

Client Number: 22522 Call Status: Fetch Open Messages: 15

- Search...
- Sandbox
- Introducing Active Insights
- Customers
- Platform
- Security
- Base Package
- Archive
- Filters
- Transcription
- AI Call Scoring
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- Ellie

Medical Necessities (866-844-1586)

- Active Insights
- Dispatch List
- Show Information

Active Insights Exporting



Active Insights allows you to export key data

Export Messages, Call Records, Call Recordings and Screen Videos, Call Scoring Sheet, Call Statistics, Reports, etc

Browser tabs: IS Supervisor, List Calls

Address bar: staging.amtelcoservices.com/portal/call_logs?group_by=none&is_default=false&order=asc&search-client_number=7004&search-media-match-has_audio_recording=true&search-media-match-has_transcript=true&search-stamp-is=rd-last_x_weeks-20&sort_by=client_number

Browser bookmarks: Web Agent, miTeamWeb, Active Insights, Web Supervisor, Backup Web Agent, Innovation Machine..., MSM Admin New

Navigation: ai ACTIVE insights | Configuration | Usage | Reports | Dashboard | Call Logs | Messages

Icons: Bell, User, Heart Rate

Calls

Call Export

close

Call Export

Export calls for selected range

Calls in selected range

Selected Search Criteria

media=Audio, Transcript, client_number=Medical Necessities (866-844-1586), stamp=last 20 weeks

START TIME

export

MEDIA

Export Your Active Insights Call Scores to a PDF

Client Number: 225221 Call Status: Fetch Open Messages: 15

- Search...
- Sandbox
- Introducing Active Insights
- Customers
- Platform
- Security
- Base Package
- Archive
- Filters
- Transcription
- AI Call Scoring
- AI Sentiment
- AI Accuracy
- AI Revenue
- Code Call Scoring
- Transfer Center Scoring
- Dashboard
- Agent Dashboard
- Reporting
- Exporting
- Export to PDF
- Caller History
- Ellie

Medical Necessities (866-844-1586)

- Active Insights
- Dispatch List
- Show Information

Active Insights Exporting to PDF



Active Insights allows you to export the Show Screen for a selected call

Exports the Show screen to a PDF

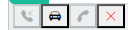
This allows a supervisor to share the scores with an agent via email or printed copy

****Coming Soon - Export Dashboard to PDF****

****Coming Soon - Schedule Exports****

The screenshot shows a browser window with the URL: `staging.amtelcoservices.com/portal/call_logs/3531365?return_url=%2Fportal%2Fcall_logs%3Fpage%3D1%26search-stamp-between-start%3D8%252F1%252F2024%26search-stamp-between-end%3D8%252F31%252F2024`. The interface includes a navigation bar with 'ai' logo and menu items: Configuration, Usage, Reports, Dashboard, Call Logs, Messages. A 'Call Information' panel is partially visible on the left. A 'Call Export' dialog box is open, listing the following options:

- Call Start/End
- Messages
- Call Trackers
- Voice Recordings
- Screen Recordings
- Transcripts
- PDF View



Empower Your Agents By Providing Them Previous Call History

Client Number: 2254 Call Status: Fetch Open Messages: 15

- Search...
- Sandbox
- Introducing Active Insights
- Customers
- Platform
- Security
- Base Package
- Archive
- Filters
- Transcription
- AI Call Scoring
- AI Sentiment
- AI Accuracy
- AI Revenue
- Code Call Scoring
- Transfer Center Scoring
- Dashboard
- Agent Dashboard
- Reporting
- Exporting
- Export to PDF
- Caller History
- Ellie

Medical Necessities (866-844-1586)

- Active Insights
- Dispatch List
- Show Information

Active Insights Caller History



Automatically gather data on callers and use that to empower your agents with future interactions

New Caller or Repeat Caller Indication

Previous Call History

Last Call Timestamp

Caller ID

Caller Name

Caller Message

Agent Who Handled Last Call

Web Agent - 1.0.7065.14

Station 1004 ai insights

Ready 2/22/23, 11:33 AM winop4

F1 Active Insights Cloud Call Log Transcription and Analytics Kevin Beale 154 Talk 00:28 F2

Thank you for calling the Active Insights Cloud Call Log Transcription and Analytics solution

Time to Answer: 5.5 sec Called Number: 2251 Client Number: 2251 Call Status: Incoming - Secretarial Open Messages: 16

Caller 154 is a Repeat Caller with the Last Call Feb 22, 2023, 10:45:54 AM handled by winop4

Caller History

Sandbox IS 5.5 Release Call Log Improvements Active Insights Cloud Call Log Active Insights Cloud Archiver Active Insights Cloud Analytics and Call Scoring Active Insights Dashboard and Reporting Active Insights Predictive ACD Active Insights Agent Assistant Caller History Artificial Intelligence (AI) and Analytics Show Call Log

Active Insights Web Dashboard

Show Information Take Message Caller History

Caller ID 154

List of Calls for 154

Caller	ANI	Date	Agent	Client	Message
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Thank You

- Please contact Amtelco with any questions or to request information on Ellie and Active Insights
- Amtelco has brochures and white papers available to anyone who is interested in learning more

