INTRUITY CORPORATION

Scalable - Quality - Automation

Intruity Corporation was founded in 2010 as a premier software and technology company specializing in **business automation** and **telecommunications**. Our product and services range from a one of a kind **CRM** & **Agency Management System** built for Insurance agencies, to a robust **VoIP telephone system** that helps enhance business day-to-day communication.

INTRUITY
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Sales Line. (800) 898-7212
Sales@Intruity.com
Intruity.com

INTRUITY
CORPORATION

Technology Solutions

Products

OneLink

Cloud-based CRM & AMS solution designed to automate your business processes.

RIPPLE

All of the features of a traditional PBX telephone system with modern VoIP technology.

Predictive Dialer

Unique automated telephone dialing that places multiple calls simultaneously.

INTRUITY CORPORATION

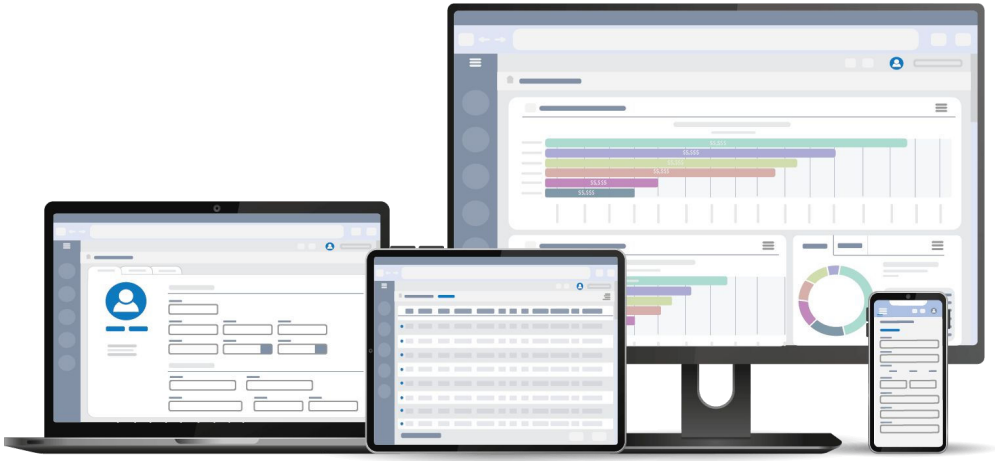
Intruity is the one smart systems partner needed for Agency Management, CRM, and VOIP telephone technology solutions.

Control and scale your business with automation and data integrity.

Cloud-based CRM & AMS solution designed to **automate** your business processes.

OneLink

CRM & Agency Management System



OneLink - CRM & AMS product

Next-generation cloud-based software that's been designed specifically to meet the needs of Health, Life, and P&C insurance agencies.

Customer Management

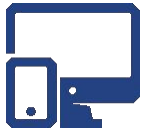
Truly understand your customers; **embrace and anticipate customer needs** for higher retention and customer satisfaction while maximizing your ROI.

Team Management

Monitor your team's valuable information including campaign, task status, compensation, licensing, document management, push company notices, and much more.

Lead Management

Increase your sales, lead disposition oversight, and accountability using our automated call software, custom drip email campaigns, and predictive dialing technology.



Commission Processing

Simplify your complex commission payments and convert your sales into income with our automated commission reporting and processing.

One Solution, **OneLink**

AMS

Agency Management System

- Operations data used to run a business more effectively
- Manage companies activity, sales, commissions, and overall revenue
- Reports and Analytics
- Track policy status/types/amounts of coverage
- Software-as-a-service (SAAS)

CRM

Customer Relationship Management

- Customer centric system that administers interactions with customers
- Connects customer to help nurture clients and leads
- Marketing automation
- Speeds up the communication process
- Protects data privacy

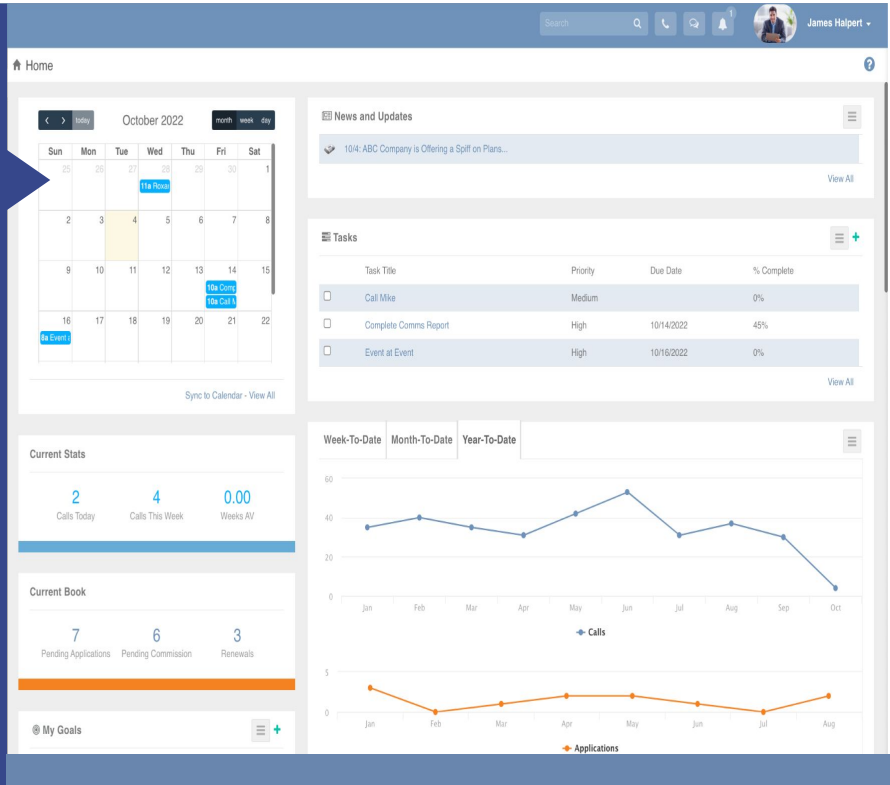
OneLink - Customizable Dashboard

Personalized Activity Board

Calendar - Calendar located top left of the dashboard. Never miss a meeting.

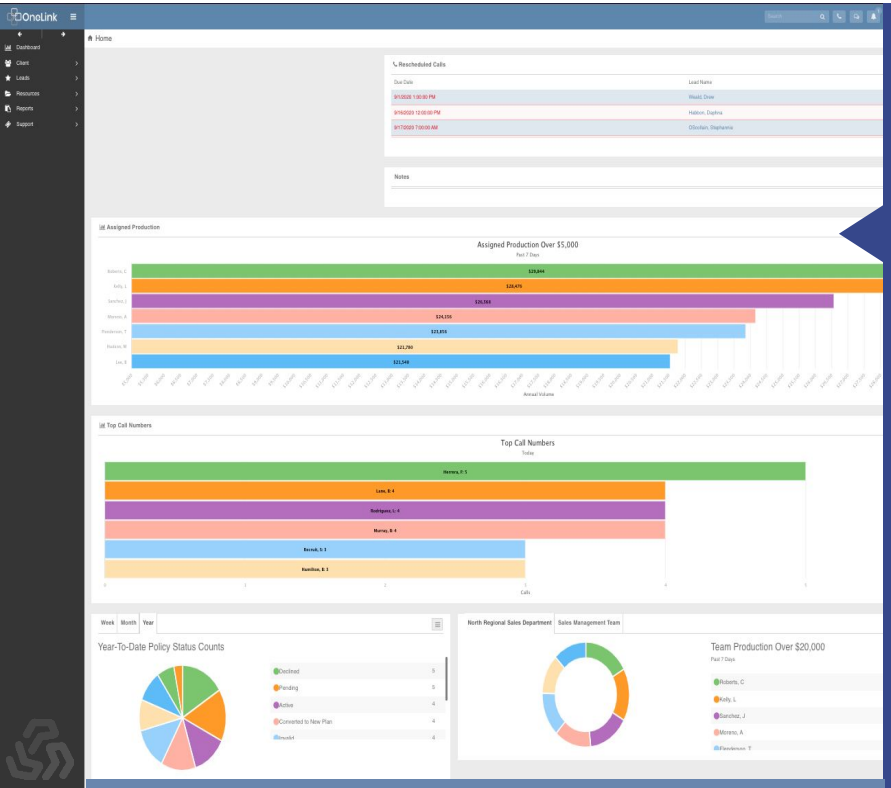
Tasks - Monitor client and lead upcoming task actions. No task falls through the cracks.

News & Updates - Individual or company-wide news items and reminders can be placed on the dashboard.



OneLink - Customized Dashboard

Personalized Progress Board



Reports - Easy to find and navigate reporting. Top down agency view to individual producers/employees.

Leaderboard - Up to date sales metrics. Show individual & team overall production

Sales to date - View policy counts and types for specific periods of time.

OneLink - Calendar Function

Put the Onelink calendar to work

- Device integration
- Meeting invites
- Meeting reminders
- Email follow up
- Rescheduled obligations
- Tasks
- And more

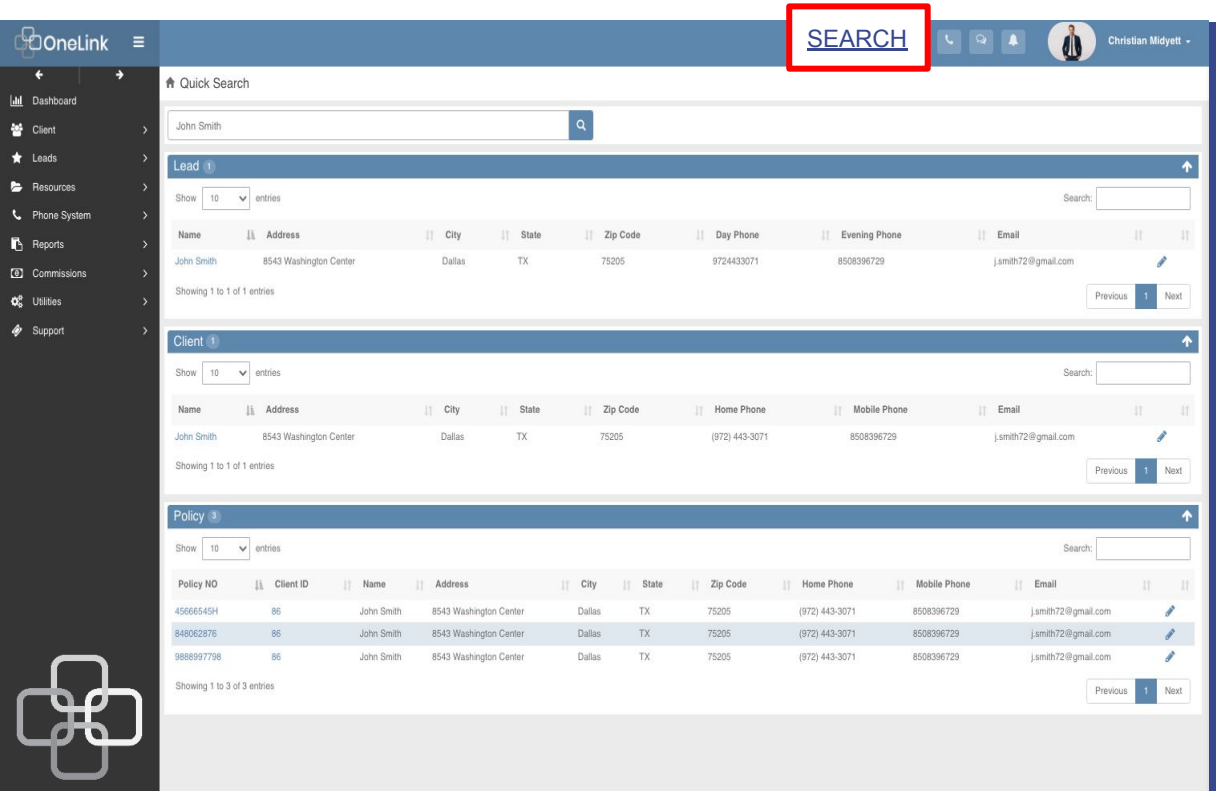
OneLink - Task Function

Stay on track with OneLink

Create and assign system tasks

- Phone call
- Appointment
- Pending items
- Email communication
- Important policy dates
- Important personal dates
- Any type of action based outreach

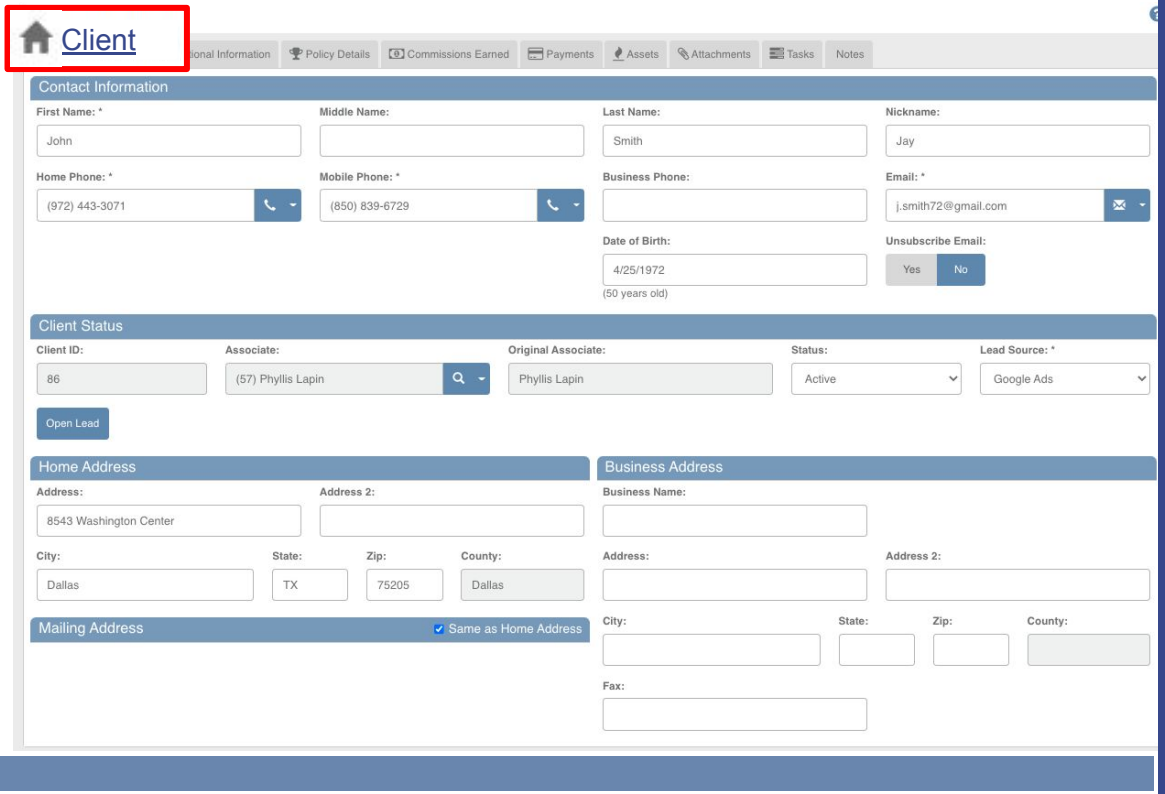
OneLink - Data Search Navigation



Easily search OneLink data

- Name
- Email
- Phone number
- Policy number

OneLink - Client Profile



Profile Contains

- Customer identity
- Pertinent customer notes
- Assets
- File upload section - accepts most file types

Integration Features

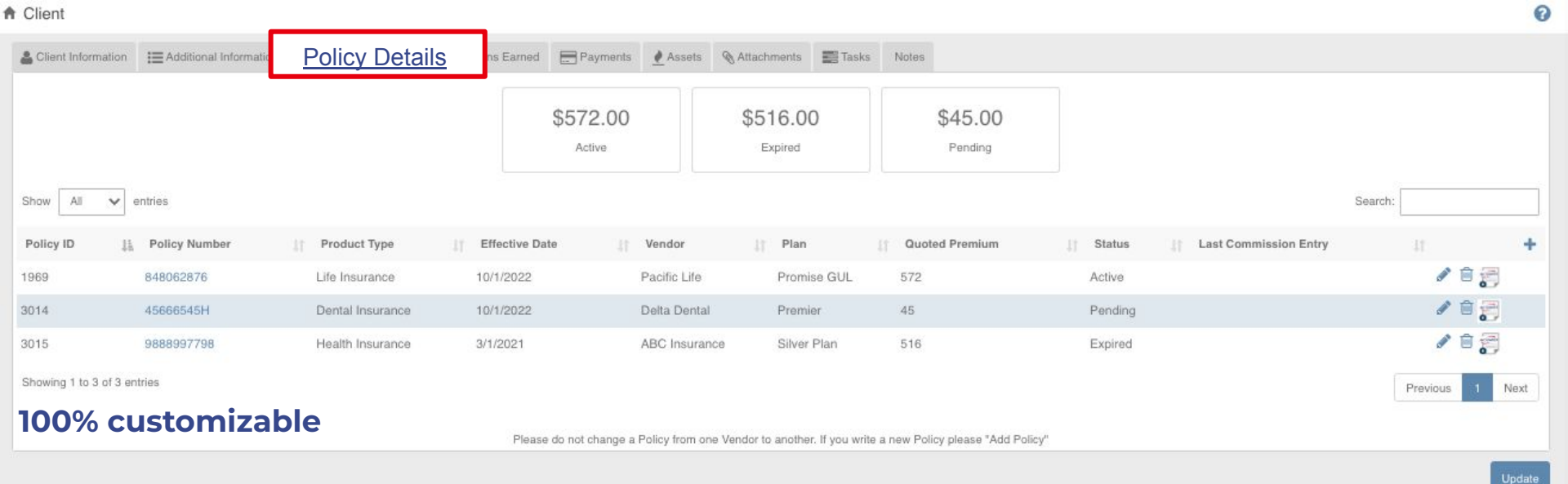
- Email
- Calendar
- Websites
- Phone
- And More

OneLink - Client Policy Details

Keep **Carrier/Policy/Plan** details front and center

Editable Fields

- Vendor/Carrier/Company names
- Policy/Plan - Type
- Policy/Plan - Numbers
- Policy/Plan - Dates
- Policy/Plan - Status



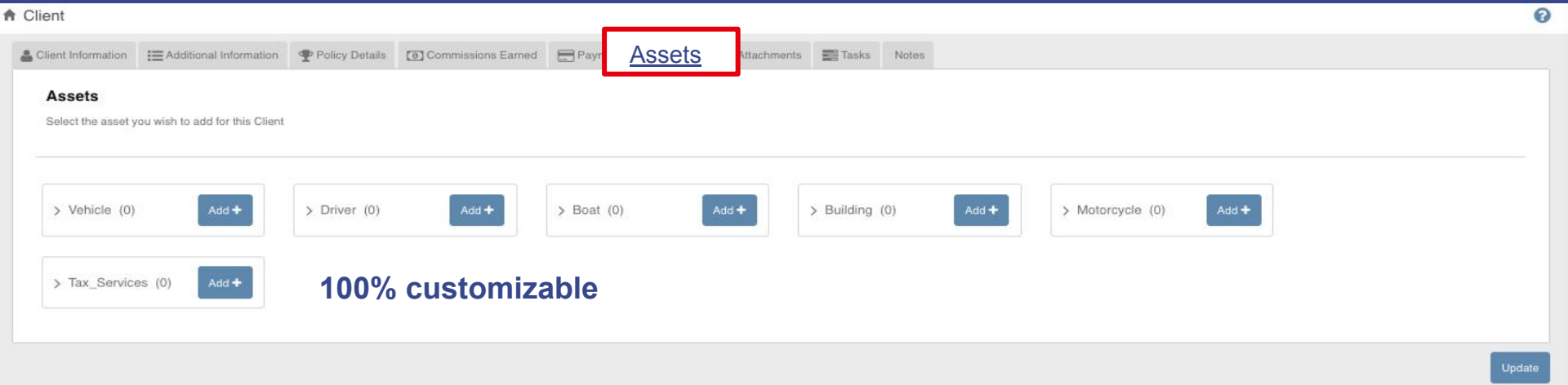
OneLink - Client Asset Tab

Asset Use

- Additional services offered
- Tangible/intangible products sold
- Insured item types
- Inventory of any sort

Asset Examples

- Vehicles
- Art
- Machinery
- Household Drivers
- Home
- Livestock
- Insurance products



OneLink - Client Campaigns

Assign clients to actionable campaigns

- Appointments/calls
- Calendar reminders
- Action based email campaigns
- Retention tasks
- Referral tasks
- Cross promotion tasks
- Holiday/Birthday tasks
- Client call campaigns
- And more

OneLink- Data Management

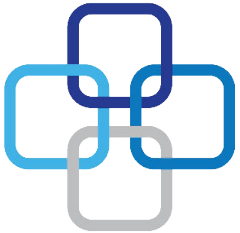
With one system, OneLink allows for accurate data storage and CRM/AMS systems automation.

Be able to sort data easily between clients, leads, and policies.

House accurate data

Standardize data entry company wide

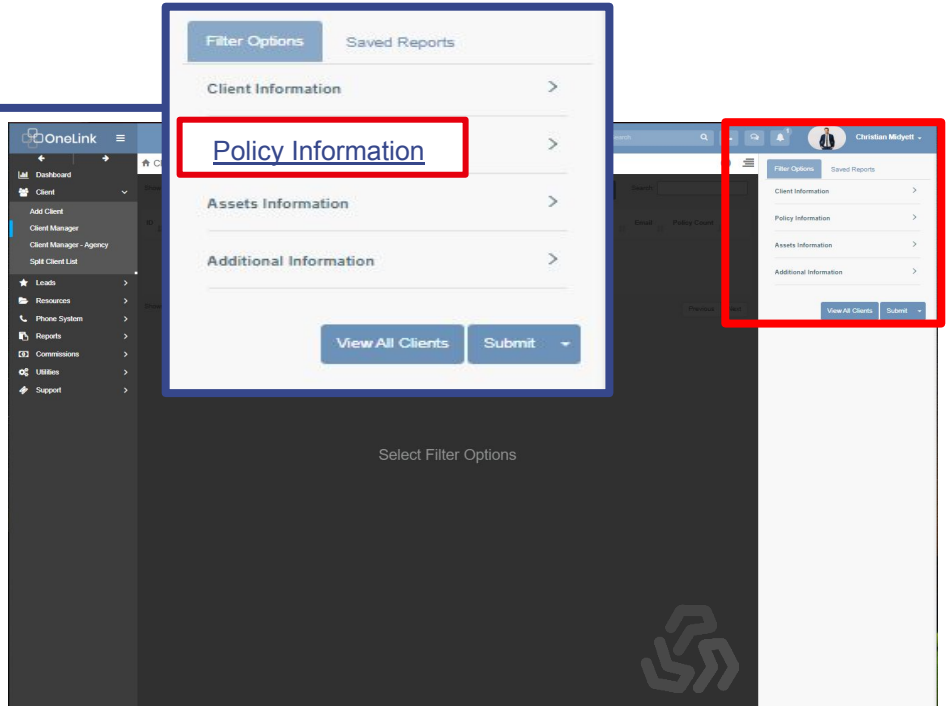
Keep essential data



OneLink - Policy Manager

Manage policy data

- Company type
- Vendor type
- Product type
- Policy number
- Lead source
- Referral source

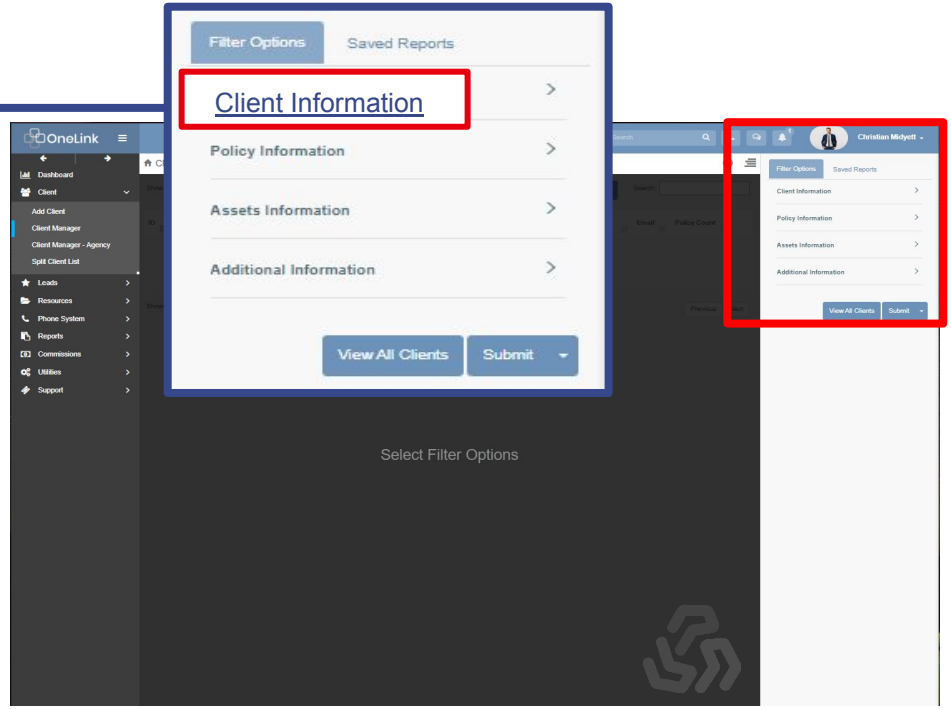


Track and find needed information within the detailed **Policy Manager**

OneLink - Client Manager

Manage client data

- Application date
- Address
- City - State
- Policy info
- Birthday
- Lead source
- Referral source
- Assets
- And more



Execute actions based off real time data

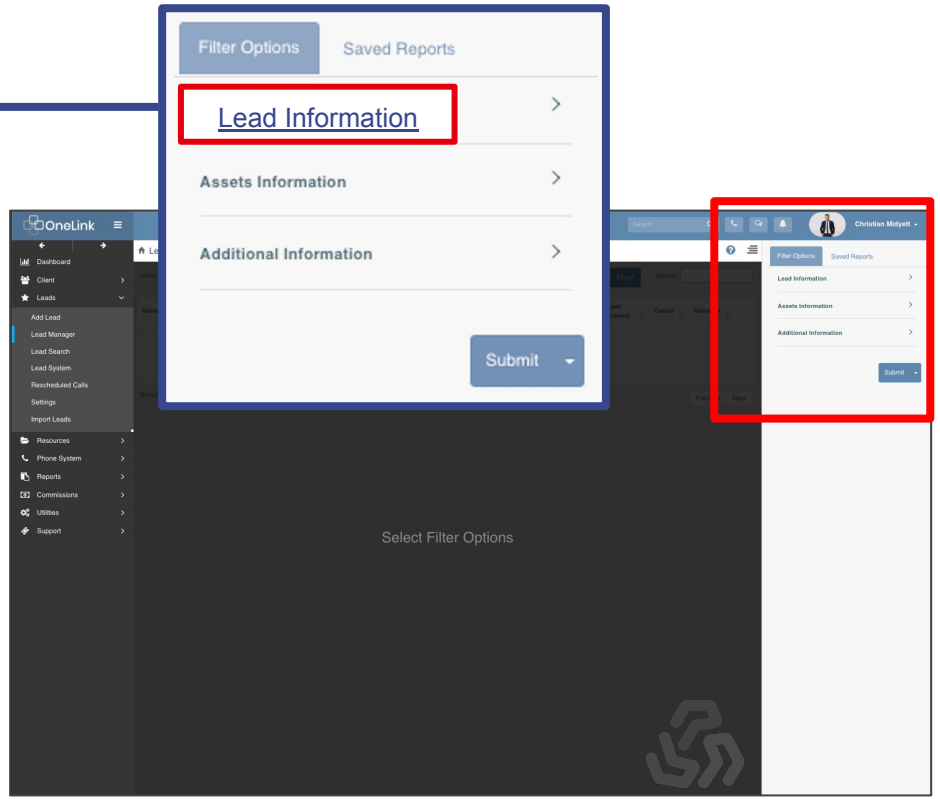
OneLink - Leads Manager

Manage Leads

- Lead type
- Lead origin source
- Who lead was assigned to
- Lead disposition type
- Lead identity data

Execute Lead Actions

- Call campaigns
- Email automation
- Text automation



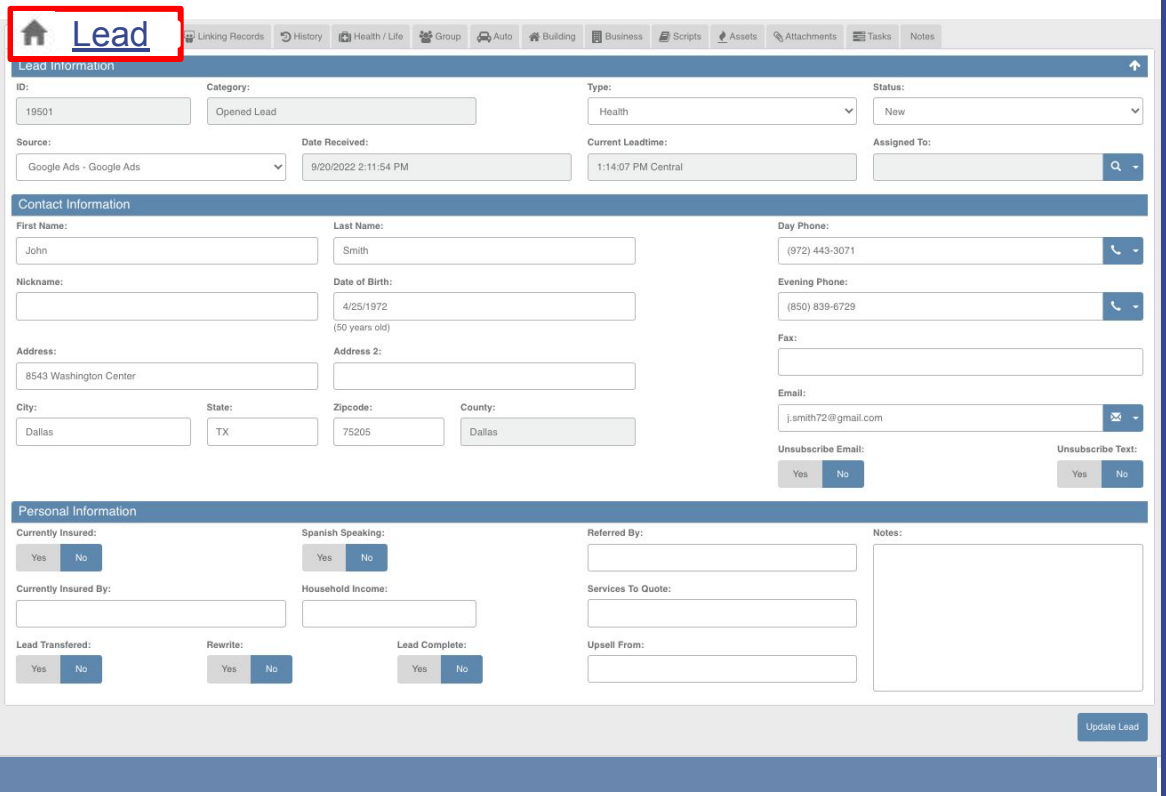
Lead Management

01 Organize

02 Automate

03 Close More Sales

OneLink - Leads Profile



Fully nurture prospects and leads within OneLink

OneLink - Lead Campaigns

Assign leads to actionable campaigns

- Assign prospect data to specific employee/agents/groups
- Create calendar reminders
- Schedule - reschedule appointments/calls
- Record disposition outcomes
- **RIPPLE** VOIP phone system, assign call campaigns to specific phone lines
- And more

OneLink - Lead Save Script Function

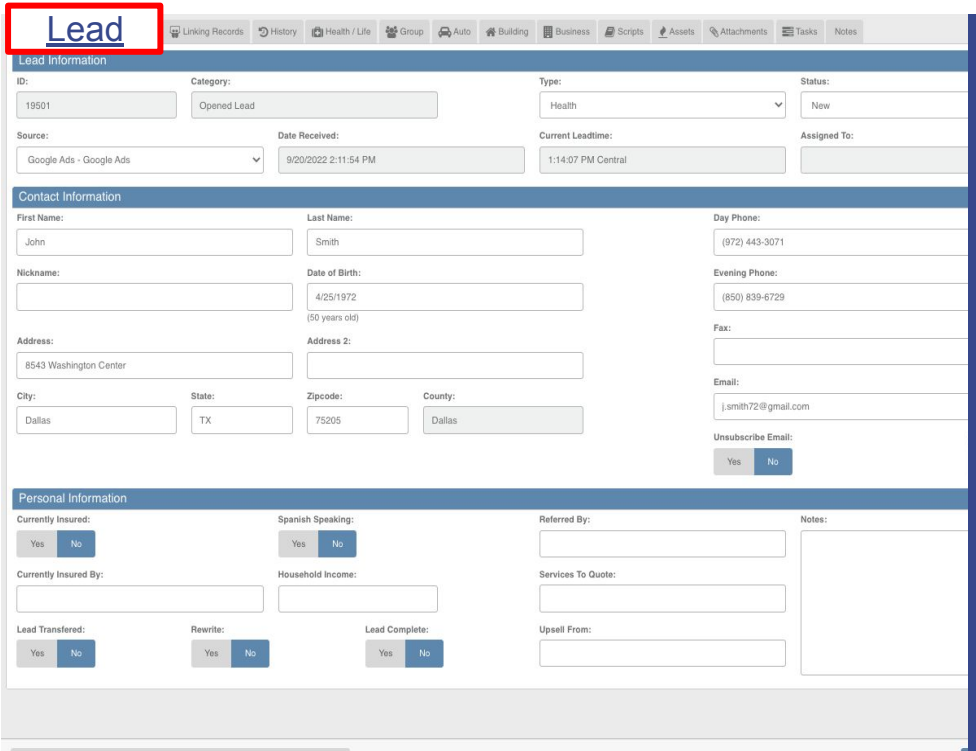
Customize and Save

- Call scripts
- Sales rebuttals
- Common objections

Ensure leads are taken care of in a consistent manner.

Change script function based on lead type.

OneLink - Lead CRM Benefits



Improve lead data and closing rates

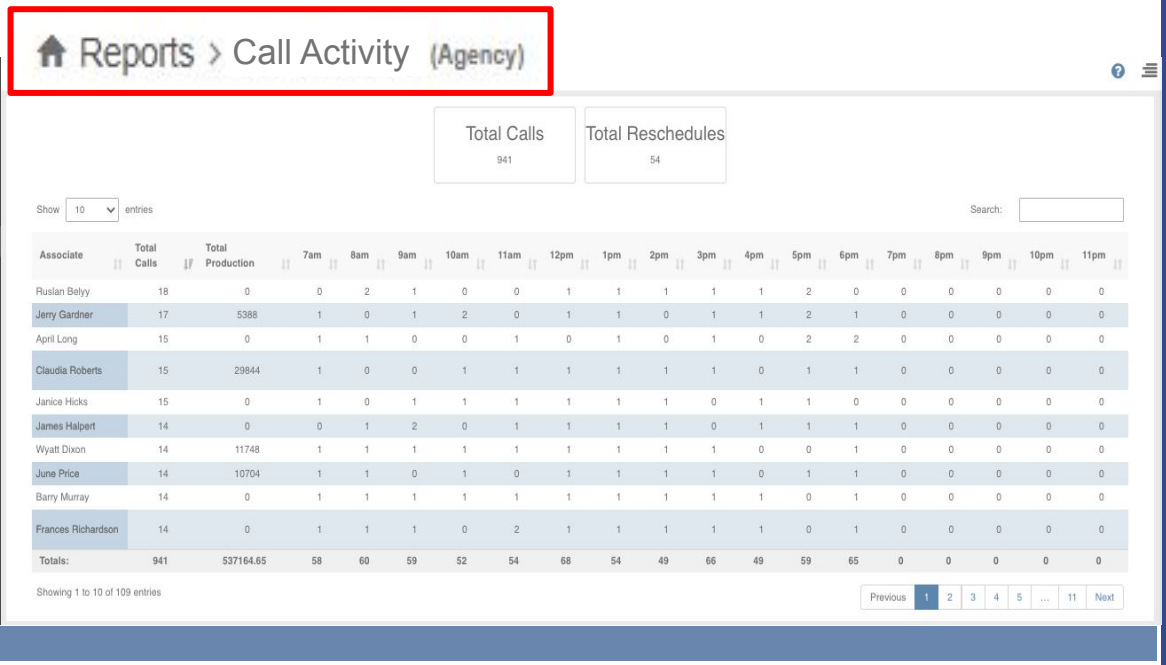
- Grade and monitor closing techniques
- Generate performance data
- Import and Export to Excel/CSV files

Reporting Capabilities with **OneLink**

Easily track reporting from your agency down to agents

- 24-7 system accessibility anywhere that an internet connection exists
- Editable reports to allow you to run and monitor your business
- 100% access to real time data on the go for all hierarchies

OneLink - Reporting Capabilities



Associate	Total Calls	Total Production	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm
Ruslan Belyy	18	0	0	2	1	0	0	1	1	1	1	1	2	0	0	0	0	0	0
Jerry Gardner	17	5388	1	0	1	2	0	1	1	0	1	1	2	1	0	0	0	0	0
April Long	15	0	1	1	0	0	1	0	1	0	1	0	2	2	0	0	0	0	0
Claudia Roberts	15	29844	1	0	0	1	1	1	1	1	1	0	1	1	0	0	0	0	0
Janice Hicks	15	0	1	0	1	1	1	1	1	1	0	1	1	0	0	0	0	0	0
James Halpert	14	0	0	1	2	0	1	1	1	1	0	1	1	1	0	0	0	0	0
Wyatt Dixon	14	11748	1	1	1	1	1	1	1	1	1	0	0	1	0	0	0	0	0
June Price	14	10704	1	1	0	1	0	1	1	1	1	0	1	1	0	0	0	0	0
Barry Murray	14	0	1	1	1	1	1	1	1	1	1	1	0	1	0	0	0	0	0
Frances Richardson	14	0	1	1	1	0	2	1	1	1	1	1	0	1	0	0	0	0	0
Totals:	941	537164.65	58	60	59	52	54	68	54	49	66	49	59	65	0	0	0	0	0

Showing 1 to 10 of 109 entries

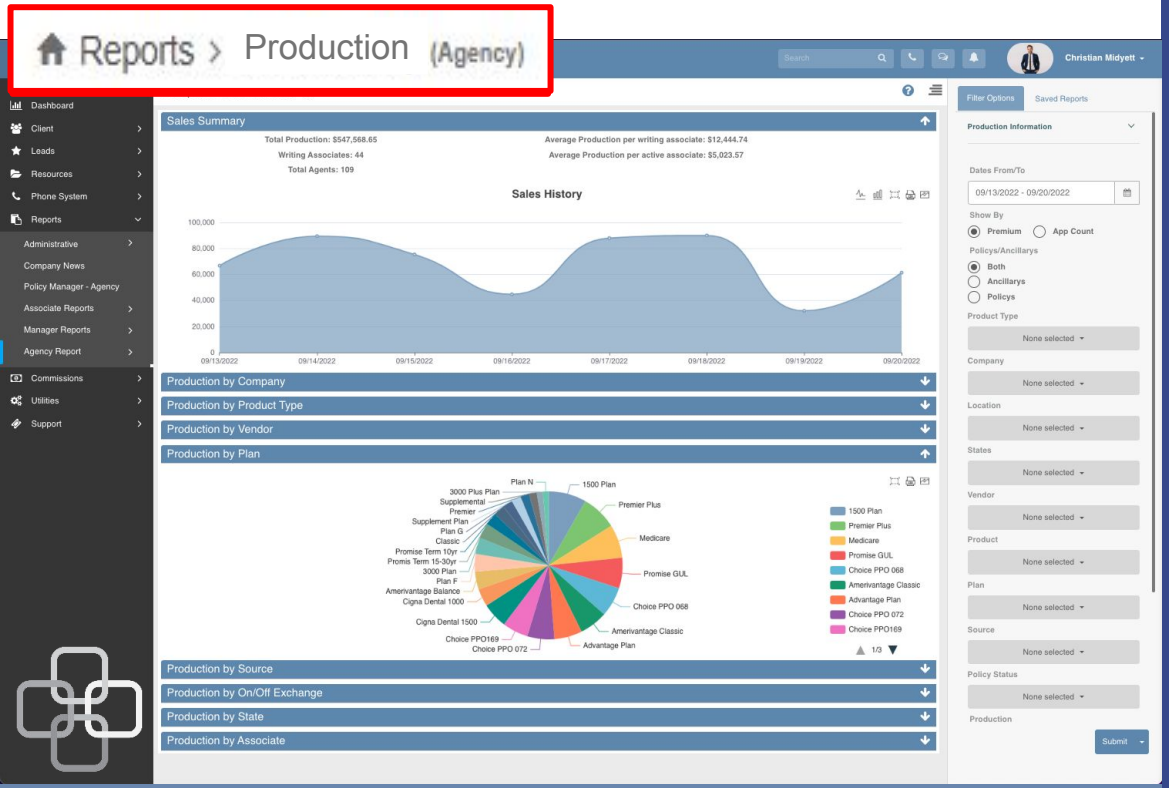
Previous 1 2 3 4 5 ... 11 Next

<u>Reports Available for</u>

- **<u>Call Activity</u>**
- Production
- Lead History
- Commission

Run agency reports that show data in an easy to understand, functional format.

OneLink - Reporting Capabilities



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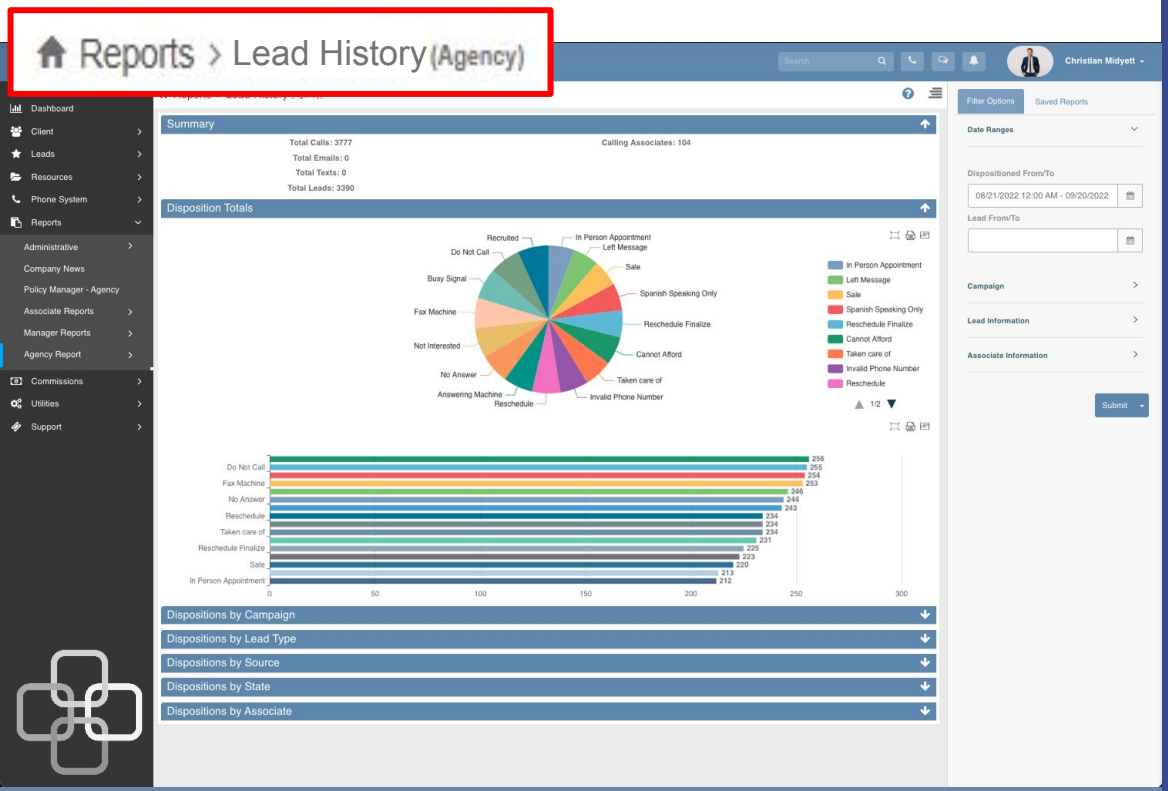

Reports Available for

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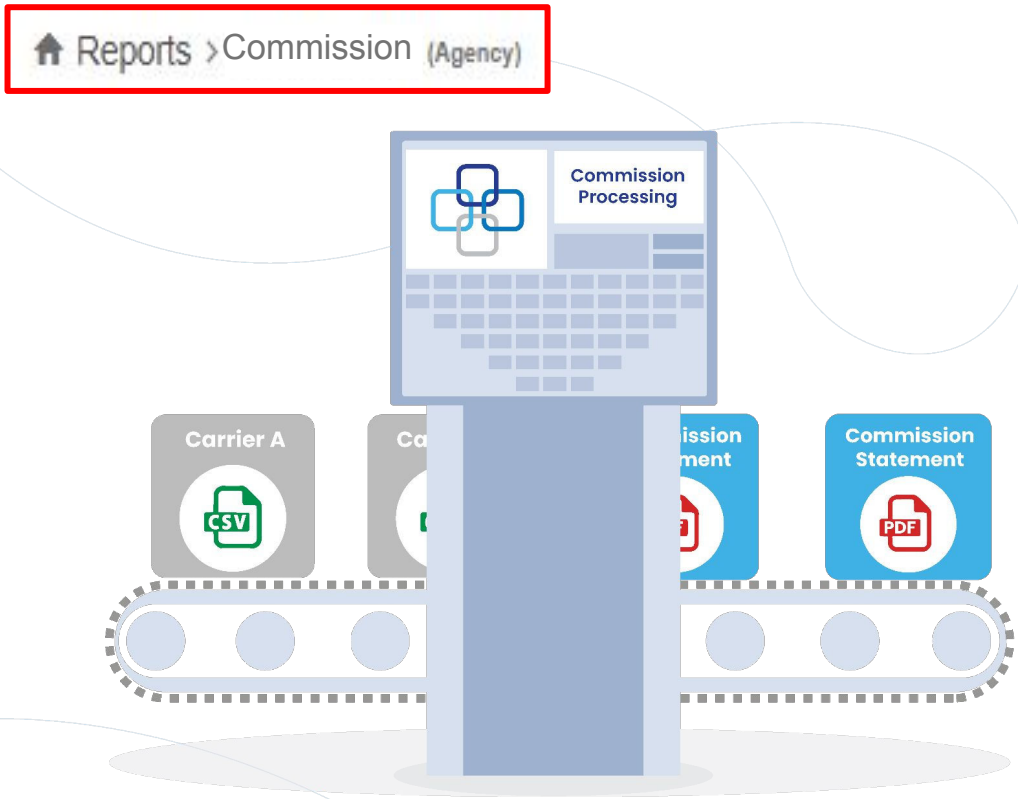
OneLink - Reporting Capabilities



Reports Available for

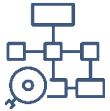
- Call Activity
- Production
- Lead History
- **Commission**

Run agency reports that show data in an easy to understand, functional format.

OneLink - Commission Function

- Individual and hierarchy rule compatible
- Pay custom commissions rules based on carrier, product, and plan types
- Set rules on first year and renewals rates
- Define by flat dollar amounts or percentage points
- Build Hierarchies
- Track-separate employee type (10-99 or w-2)
- Monitor and showcase chargebacks
- Organize your commission and payout cycles
- Build easy to view commission statements

Additional Functionality



Email SMTP Relay Integration

Built in Meeting Software

Voice Recording Software

Open API

Total Security

Our solutions provide additional functions for day to day business

OneLink - Email Function

Use and Automate email with ease

- Primary email provider integration
- No new email address required
- Send emails directly from client/lead profile
- Send Intruity meeting invites
- Store and save email communications
- Automate action based email chains

OneLink - Intruity Meetings Function

Conduct meetings with One click

- Calendar integration
- Video meetings
- Audio meetings
- Live Stream events

OneLink - Voice Recordings Function

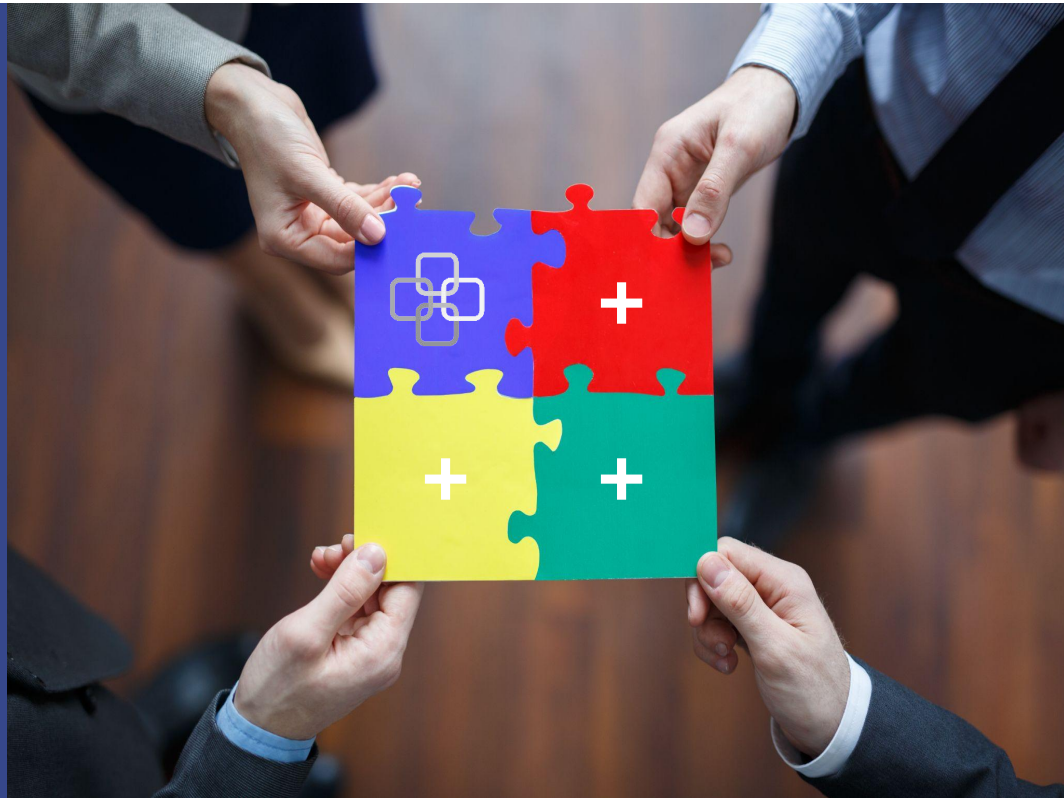
Create and save pre-recorded audio files

- Voicemail drops
- Compliance scripts

OneLink - Open API

Technology Integration

- Email
- Website
- Lead vendors
- Calendar



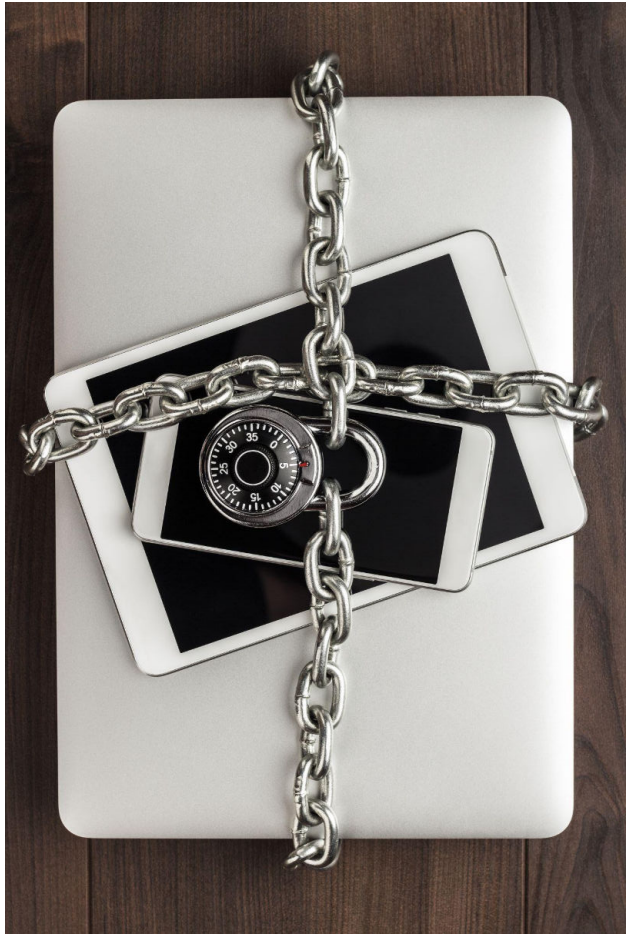
OneLink - Security

2 Step verification process (2FA)

- Optional or required
- Email
- Text

Data encryption

- No data cross contamination



OneLink - Pricing and Agreement

Product plans simple straightforward pricing

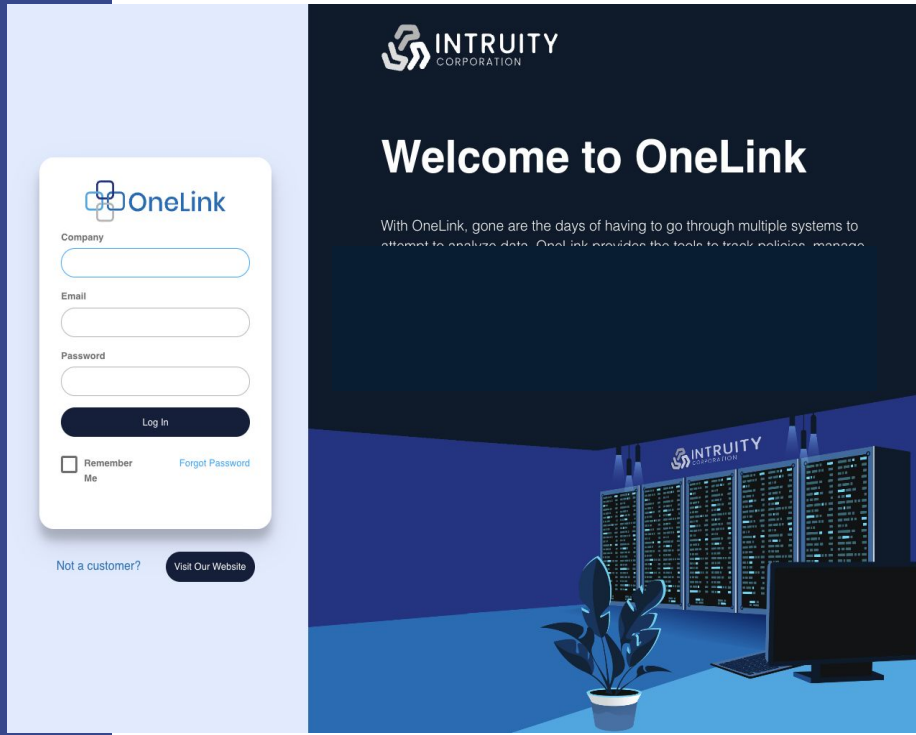
One year contract minimum, pricing is based off of the amount and types of users associated with the Platinum account

Only pay for active users, an Administrative user can manipulate the terms of the contract at any point based on the active user amounts and user types.

1st payment billed within 30 days after initial setup, monthly invoices will be attached to the Administrative users profile. Bills will be deducted on the 15th of every month

OneLink - Recap

- All system needs in one place at one time
- Access to information anytime/anywhere
- Automates business actions and flow
- Real time, calculable data metrics
- Creates uniformity and consistency
- 2 CRM systems in One
- Creates scalable solutions
- Control system costs



RIPPLE - VoIP Phone System

Modernize business communications, with a hybrid work environment.

RIPPLE - Phone System

RIPPLE makes it affordable and easy to connect to anyone, anywhere in the world. All of the features of a traditional PBX telephone system.

VoIP, also known as Voice over IP (Internet Protocol), lets you **manage** outgoing and incoming **calls over an internet connection.**

Today, phones **no longer need to have on-site hardware**.

You can now **use your smartphone** or even an softphone to run your business.

RIPPLE works as a **VoIP supplier** that uses IP PBX to provide you the best VoIP service and manage your business communications.

RIPPLE - Phone System

VoIP - Voice over IP (Internet Protocol) manages outgoing and incoming calls over a **cloud based internet** connection

Providing the **newest functionality** used with modern VoIP technology

VoIP solutions meets the needs of **businesses - any industry, any size**

Intruity works as a **VoIP supplier** to provide the best VoIP service to help manage business communications.

RIPPLE - Phone System

Industry leading features

- Multi extension
- Voicemail to email
- Voicemail Drops
- Call ques
- Call recordings
- DID - phone numbers
- IVR - interactive voice response
- Simple and Affordable
- Toll Free Numbers
- Call Analytics

Predictive Dialer

Predictive Dialer is a form of automated dialing that places multiple calls simultaneously.

The dialer will immediately move to the next lead if the call is dropped or sent to voicemail. When a call does connect, it is quickly directed to the calling party

A predictive dialer increases calling rates by attempting to connect with as many customers as specified simultaneously.

Predictive Dialer - Campaigns

Increase Call Efficiency

Upload call data into OneLink

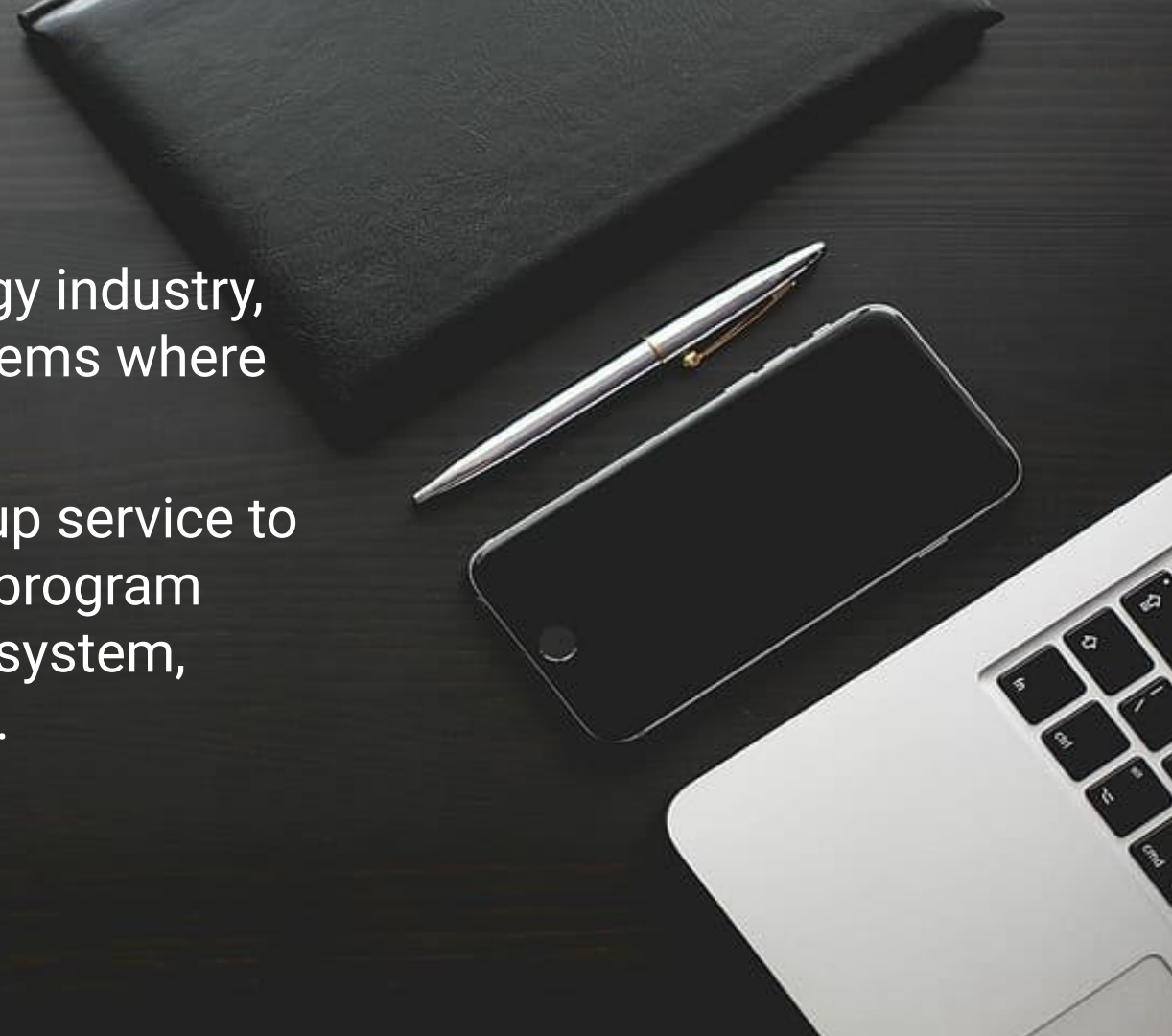
Use RIPPLE VOIP system to conduct call campaigns

Automate lead dialing and reach more prospects

Why Intruity?

In a growing technology industry, businesses face problems where we provide solutions.

From white glove set-up service to being a simple to use program that integrates to one system, we’ve got you covered.



INTRUITY
CORPORATION

Thank You!

For over a decade we have been considered a trusted Tech partner to thousands of partner agencies and firms.

At Intruity customers come first - we look forward to earning your business!