



Sell more insurance policies while enhancing the customer experience.



Ooma Office Pro Plus with AgencyZoom helps agencies improve their customer experience, streamline operations, and thrive in a highly competitive market.

Caller-ID Pops powered by Ooma pre-built computer telephony integration (CTI) enables insurance agents and staff to preview and proactively manage customer and lead profiles during phone conversations.

As soon as an agent connects with a customer or lead that has a matching record within the AgencyZoom CRM application, their profile will appear on your desktop, making it easy to anticipate needs, answer questions, and deliver personalized service.

Deliver an intelligent customer experience:

Pre-built Integration

Deploy and easily manage a solution that fits naturally within the AgencyZoom platform.

Caller-ID Pops

Preview customer information including customer name, policy descriptions, policy start/end dates, and policy cost within the Ooma Office desktop application. For prospect calls, the Caller-ID Pop shows lead status with a list of sales opportunities.

Call Control

Mute, put the call on hold, add a call participant, transfer the call to a staff member, record the call or seamlessly flip the call to another device such as a mobile phone.

Automated History

Get automated call logs for matched CRM contacts to help ensure accurate customer and lead interaction history.

Staff Productivity

Elevate the customer experience by eliminating time-consuming lookups and screen switching when interacting with callers.

Proactive Engagement

Equip staff with the right insights to anticipate needs, predict next steps and provide timely service to create better outcomes for customers and the agency.

Compatibility

Available with the Ooma Pro Plus service plan.

