



Insightly Voice

Drive sales productivity with Click-to-Call

Insightly Voice is a completely integrated CRM telephony solution that leverages CRM data and the Insightly integrated platform giving your salespeople the tools they need to maximize their productivity. And it does ALL this without requiring complex configuration or setup.

Build customer relationships that last

Contextual contact activities like call notes and complete call histories are not only available to the sales team, but to anyone engaging with that contact across departments including sales, service and marketing, enabling companies to build stronger customer relationships.

Call prospects with just a single click

Reach out to customers, organizations and prospects by simply clicking on their phone number within Insightly.

Reduce data entry dramatically and increase productivity

Dramatically streamline your sales process with automatic call logging, voice mail drops, and convenient call lists so that you can move your lead and contact calls with much greater efficiency. Both outbound or inbound call can be automatically logged to the appropriate lead or contact record, along with the call disposition and notes.

Multi-task to move deals along faster

View a contacts call history, take notes, find answers, and finalize the details of an opportunity while your contact is on the line, all without switching devices or software.

Turn inbound calls into more personalized sales

Customers can reach you on a dedicated personal line with incoming calls and voice mail, and automatically present all their contact information and valuable sales history before you even answer the call.

Localize your number to match a contact's region

With Insightly Voice you can increase the chances that your call will be picked up by selecting a phone number that is local to the contact's region. If you're calling a prospect in San Francisco, you can select a 415 area code.

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Features

Feature	Business Impact
Click-to-dial from leads/contacts	Drive sales productivity to new heights with click-to-dial
Pre-recorded voice mail messages	Deliver compelling leave-behind messaging consistently in a single click
Verified phone numbers	Eliminate human errors and make the right connection every time
Wait greeting, hold greeting, & voice mail	When lines are busy deliver the experience customers demand with pre-recorded voice greetings
Incoming call forwarding	Never miss an opportunity to engage an inbound call with call forwarding
Call list for reps	Increase call velocity with pre-loaded call lists
User-selected local phone number	Improve potential for live connections with region specific area code selection
User call activity reporting	Monitor and manage the productivity of the sales, service and delivery teams; set goals and call velocity metrics
Call recordings (option to turn off)	Keep everyone on the same page with the latest interaction with customers; honor call privacy preferences
Manager call listen-in functionality	Never miss a coaching opportunity by listening to your sales team's interactions with customers and prospects
Call routing (shotgun or round robin)	Drive positive customer engagement experiences by routing the call to the right person every time
Missed call notifications	Keep customer satisfaction top of mind with predetermined call back time-lines

Pricing & Availability

Insightly Voice is available to users of the Insightly Professional and Enterprise annual CRM plans in the U.S. and Canada. Insightly Voice is available as an annual subscription at USD \$35 per user per month with 500 minutes of talk time included on either inbound or outbound calls. Additional minutes can be purchased separately, for 4 cents per minute, calculated on a monthly basis (no rollover minutes).

Requirements:

Only for calls to US/CAN

Only available for Professional or Enterprise CRM plans

Required to have a Premium or Ultimate Success plan