AGENTTECH

PLATFORM GUIDE



The #1 AI-Powered Insurance Dialer

Inbound queues, outbound dialing, AI compliance scoring, AI voice agents, and a built-in CRM. One $50 license per seat.

One dialer for inbound and outbound, built to keep your agency compliant, *call after call.*

AgentTech Dialer is the insurance call center platform: the dialer, the CRM, lead management, an in-call AI Sales Coach, post-call AI compliance scoring on every recording, and autonomous AI voice agents, all in one browser tab. Nothing is tiered. The $50 seat license unlocks everything; calling, texting, and AI are billed by usage from a prepaid wallet.

1M+
CALLS PROCESSED

100+
INSURANCE AGENCIES

99.9%
UPTIME, REDUNDANT

100%
BROWSER BASED



THE DIALER

Queues, dial modes, and texting in one place.

Routing is decided in real time from the database, not a static config file. Agents work every channel from one screen.

Advanced queue architecture

- **Publisher queues.** Every call source gets its own queue and SIP address, with rules for where it may route.
- **Global queues.** Aggregate availability across teams, round-robin, with failover when a queue goes offline.
- **Standard and external queues.** Where your agents sit, or hand calls to a partner platform through webhooks with an audit trail.
- **Smart routing.** Skills, state licensing, and priority decide who gets the call, with call caps per agent.

Calling and texting

- **Five dial modes.** Preview, progressive, power, predictive, and auto for outbound campaigns.
- **Inbound and outbound.** Click-to-dial from the CRM, transfers, conferencing, recording, and voicemail.
- **Two-way SMS.** Texts with the full conversation on the contact record; auto-replies and bulk campaigns with opt-out handling.
- **Browser based.** WebRTC audio, any device, no PBX. SIP desk phones still work if some agents prefer them.



AI COMPLIANCE AND TRANSCRIPTION

Every call transcribed. Every recording scored.

1

Record

Every call on every queue, stored to meet Medicare and state retention rules.

2

Transcribe

Live speech-to-text tuned for carrier names, plan types, and Medicare vocabulary.

3

Score

Each recording checked against your ruleset. Flags surface for supervisors with transcript and score.

What the AI checks on every call

- Medicare Parts A and B verification
- Recording disclosure
- Consent to contact (TCPA)
- TPMO disclaimer
- Health information disclaimers
- Your agency, carrier, or state-specific questions

- **100% coverage.** No sampling and no manual review queue. Every recording gets a scorecard for audits and coaching.
- **Searchable history.** Find any call by what was said, jump to the recording, annotate and share clips.
- **Usage pricing.** Transcription is $0.50 per hour of audio; compliance analysis is billed per call analyzed.



Help on every human call. Agents for the rest.

AI Sales Coach, in the call

- **Smart suggestions.** Talking points and responses appear as the AI follows the conversation.
- **Objection handling and battle cards.** Instant scripts for the objections your team hears most; competitor and plan comparisons the moment a name comes up.
- **Your knowledge base.** Load agency-specific information so the coach speaks your language.

AI voice agents, billed by the minute

- **Receptionist.** Answers 24/7, greets by campaign, routes by intent and state, books appointments, takes messages.
- **Qualifier.** Asks qualifying questions, checks eligibility, warm-transfers to a licensed agent with the transcript attached.
- **Outbound.** Reminders, follow-ups, nurturing, and callbacks placed inside your calling windows.
- **Training agent.** AI Mock Calls dial your agents as realistic prospects, drilling what compliance scoring flagged. $0.15 per minute.
- **Compliance-first.** Every AI conversation is recorded, transcribed, and scored exactly like a human call.



CRM, automations, and reporting, included.

Built-in CRM

- Profiles with custom fields, tags, notes, and search.
- Calendar, callbacks, and automated reminders.
- Calls, texts, notes, and appointments on one timeline.
- No separate $75-150 per seat CRM subscription.

Custom automations

- Triggers: call events, contact updates, dispositions, time.
- Logic: if/else, delays, webhooks to outside systems.
- Actions: texts, emails, appointments, tags, task routing.
- Text after a sale, email after a missed call, auto-book.

Reporting and API

- Queue, publisher, and agent reports with compliance scores.
- Custom, scheduled reports on any captured field.
- 200+ REST endpoints and real-time webhooks.

Supervisor tools

- Listen, whisper, and barge into live calls.
- Real-time dashboards: queue depth, agent status, flags.
- Dynamic scripts by queue, call source, and agent.

Call recording · Voicemail · Dynamic scripts · Lead marketplace · Call routing · Commissions · Contracting · Mobile app

One flat license. Usage you can see.

$50

PER SEAT, PER MONTH

Every platform feature and the CRM, unlocked on every seat. Nothing is tiered or upsold. No setup fees and no hardware.

Usage, from a prepaid wallet

VoIP calling	**$0.025 / minute**
AI transcription	**$0.50 / hour of audio**
AI Mock Calls (training)	**$0.15 / minute**
AI voice agents	**Per minute**
AI compliance analysis	**Per call analyzed**
Text messages	**Per message**
Local / toll-free numbers	**$1.50 / $3.50 per month**

Compared with enterprise CCaaS

Five9 runs $150-200+ per seat for the dialer alone, plus a separate CRM at $50-150 per seat. Genesys Cloud starts at $75 and full-featured plans run $150+, again without CRM. **A 50-seat team saves about $132,000 a year in seat fees with AgentTech.**

AGENTTECH

Book a live demo

Bring your current bill and your queue setup. We will show you the same calls running on AgentTech, and score a few of your recordings so your compliance team can see what the AI flags.

SCAN TO BOOK

agenttech.io/schedule-demo

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