

InterCall's Solutions for the Financial Industry



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InterCall, the largest conferencing provider in the world, gives you comprehensive audio, web and video conferencing services that you can use for everyday meetings where you review contracts and discuss strategies and high-profile events in which you make corporate announcements or train employees on new federal regulations. We have more services supported by our years of experience that you can use to better manage relationships and stay connected with the people who are critical to getting your job done

Features and Services

Building relationships with shareholders, finalizing strategies and meeting with clients and coworkers require tools that let you meet quickly and easily with anyone in the world. With InterCall's solutions, you get everything you need to connect with people, make decisions and give project updates or hold corporate announcements and conduct online training sessions.

Everyday Meetings

For daily communication and meetings with internal teams, customers, vendors and partners, InterCall offers easy-to-use conferencing tools to help you get things done quickly.

- + **Reservationless-Plus®** – meet at a scheduled time or at a moment's notice using this feature-rich and easy-to-use audio conferencing service that makes conducting sessions simple and convenient. The calls can even be recorded for future playback.
- + **Automated** – conduct a conference call without the assistance of an operator by dialing a permanent dial-in number. Everyone enters a private passcode and is then placed directly into the meeting. PAC codes or "deal codes" can be used for each call making it easy to bill back to a specific client or cost center.
- + **ITFS (International Toll-Free Service)** – provide convenient, toll-free access to your U.S.-based conference calls for participants located internationally. The ITFS phone number uses the originating country's national numbering format; therefore the toll-free number will vary by country. Your international participants will have the exact same call experience as those dialing in from the U.S.
- + **InterCall Unified Meeting** – let people see what you are talking about and collaborate during your online meetings with a single system that brings together audio, web and video conferencing tools.
- + **Microsoft® Office Live Meeting**, offered by InterCall – host interactive, collaborative meetings by showing presentations, software and web sites.
- + **MeetingCenter™**, powered by WebEx™ – use the Internet to share a PowerPoint® presentation, demonstrate software or show web site navigation.

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AAP/EDE

- + **InterCall Video Conferencing** – meet with your clients face-to-face using multipoint video conferencing. If you don't have your own video conferencing equipment, InterCall works with over 9000 public rooms that are available to reserve for your meetings or we can help you purchase equipment through our partners like Polycom and Tandberg.

High-Profile Events

When hosting large-scale company announcements, training sessions and lead generation seminars, InterCall offers more services and features to help you reach a world-wide audience.

- + **Registration Services** – manage your events and keep track of participants by deciding what information you would like to gather from each registrant and choosing from handy options such as email reminders and custom-scripted messages. With both phone and web access to choose from, you can construct a registration program that best suits your needs.
- + **Reminder Calls** – ensure a strong event turn-out by having the registrants of your conference receive a reminder call, fax or email 24-48 hours in advance of your scheduled conference.
- + **Operator Assisted** – get added professionalism and features with assistance from our expert audio conferencing operators. They can help you manage the call as participants join and will be with you every step of the way. For calls where security is a main concern, participants can join using a secure password that you specify when making the reservation.
- + **TrainingCenter**, powered by WebEx – deliver live, interactive training sessions. Share presentations, software and web sites, test and poll your participants and hold breakout sessions.
- + **EventCenter™**, powered by WebEx – get everything you need to manage your online event, from planning the seminar to conducting the meeting to post-event follow-up.
- + **EncoreSM** – keep your session accessible to anyone who missed your call or would like to listen again through a digital recording.
- + **Participant Report** – compile an accurate post-call follow-up or lead list by receiving a summary report that details names, entry/exit times, phone numbers and up to four additional pieces of information.
- + **Transcription** – maintain accurate records of your conference by electing to receive a written transcript of your call delivered in an electronic or hard copy format within 12, 24 or 48 hours of your meeting. Transcripts give you a simple way to review precisely what was discussed during the meeting.
- + **Polling** – conduct on-the-spot surveys facilitated by you or our expert operators. The questions can be prepared in advance and participants respond by pressing a key on their touch-tone phones. Results are provided during the conference or sent to you at the conclusion of the session.



- + **Leader-ViewSM** – gain greater insight into who's on your call through this online call management tool that displays a private, real-time view of the participants in your conference. See who is listening and who is waiting to ask a question.
- + **Approved Participant List** – add extra security to your call by requiring each participant to be validated against a list of approved participants before joining the call. All you need to do is email the approved list of participants, which includes all information required for validating the participant's identity, at least 24 hours prior to the start of your meeting.
- + **Walk-Through** – ensure that everyone speaking during your conference is well-prepared prior to addressing the media or any other audience. InterCall's dedicated event team works with you to conduct a dry run to make sure everyone is on the same page.
- + **Communication Line** – speak with an operator outside of the main conference to convey behind-the-scenes information, orchestrate guest speakers or give timing cues. A Communication Line makes it easier to manage all the details of a large conference.

EXTRA SUPPORT FROM THE EXPERTS

If you're short on time and resources or just want some extra assistance to make sure your event is flawless, InterCall's expert event services team helps you plan, conduct and wrap-up your seminar so you can focus on your message. From recommending appropriate features and conducting rehearsals to monitoring the live event and gathering report information, our dedicated specialists work with you, ensuring a more professional and successful seminar.

Crisis Communication

When you've got an emergency or important information to share, there's no time to waste. InterCall's online tools let you quickly notify internal and external teams so everyone knows what's going on.

- + **CrisisConnect Online** – take control of all your critical communication broadcasts online. Send email, text and voice mail broadcasts when there is important market information, system outages or other notifications to share with your leadership team, employees or customers on-the-fly from any phone or through the CrisisConnect Online web-based interface using text-to-speech recognition technologies. Broadcasts can be sent to multiple phone numbers stored for recipients. Real-time, online reports show who has received the message and who still needs to be contacted.

Billing Management Services

InterCall offers several features and systems that let you conveniently track and manage conference usage and expenses.

- + **Project Accounting Code** – maintain better control of conference charges by tracking PAC codes that will help you identify which charges need to be billed back to clients or cost centers.
- + **Online Reports** – gain control of your firm's conferencing activity by accessing your secure, online account 24/7. Track conferencing usage by service, by month, by user and more, through one of the many reports available. This system



makes it easy to accurately track conferencing expenditures back to individual cases and clients in advance of receiving your invoices.

- + **Electronic Invoicing** – streamline your client bill back process by receiving monthly invoices in a standardized electronic format eliminating the need for paper copies.