

Business Value: Suggested Marketing Copy

A few questions about CallRecordz

- What are the job roles of the people who would be looking for this product?
Any department or staff who is responsible for membership support and management. In the broader market this would be useful for any organization that handles customer service through phone calls.
- What tools are people currently using? Key competitors or similar tools I can look at please

<https://www.velosio.com/blog/imis-membership-hub-ifit-for-microsoft-teams/>

<https://learn.microsoft.com/en-us/microsoftteams/teams-contact-center?tabs=unify>

This one from connect systems global [Connect for Phone Connect Systems Global](#)

- Does it only work with people using Microsoft Teams to handle calls? How does it work when someone calls a landline?
One can assign landline numbers to Microsoft Teams. For the member or end user, it is like calling a landline but the service staff can receive these calls on Microsoft Teams.
- At the moment, the messaging shouldn't mention the AI summary of calls, this is later in the roadmap?
Yes, we can leave this for later. That said, we might be able to integrate this functionality pretty soon as well.

iMIS + Microsoft Teams Phone

Your team already answers the phone.

Now *every call* counts.

A native iMIS integration that turns every inbound call into a complete, documented member interaction — automatically.

The challenge

Your staff are on the phone all day — answering member queries, handling renewals, resolving issues. But that knowledge lives in their heads, on sticky notes, or gets lost entirely. **Every call that isn't captured is a missed opportunity** to serve your members better, spot trends, or hold teams accountable.

Most associations cobble together a phone system and a CRM that were never meant to talk to each other. The result? Agents scrambling to find contact records mid-call, managers with no visibility into what's actually being said, and members who have to repeat themselves every time they ring.

The opportunity



Instant context

The member record appears the moment the phone rings — no searching, no delay.



Structured call records

Duration, caller details, and agent notes are captured and stored directly in iMIS.



Full member history

Every call, every note — one place. Any agent can pick up where the last one left off.



Management visibility

See call volumes, duration patterns, and agent activity without chasing anyone for reports.

Business value

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Calls that fall through the cracks

100%

Of calls logged in iMIS automatically

~40%

Less time spent on manual note entry

"From the moment a call comes in, your agent knows exactly who they're talking to, what matters to them, and where to pick up the conversation."

What's coming next

This is just the beginning. The roadmap includes **AI-generated call summaries** and **full transcripts powered by Microsoft Teams AI** — stored directly against the member record in iMIS, alongside the agent's own notes. For leadership, this means true quality assurance and member insight at scale, without any extra effort from your team.

Imagine a world where you can search a member's record and read exactly what was discussed on their last three calls — without asking anyone to recall it from memory. **That's the world this integration is building toward.**

Ready to see it in action?

Works natively inside the iMIS Staff Site. No new software to learn.

[Book a demo](#)

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