

CallRail

# How to use Conversation Intelligence with your agency clients



# Introduction

Marketing agencies know that the only way to stay in business is to constantly find new ways to impress clients. The “same old, same old” won’t cut it in a world where consumer behaviors constantly evolve and clients expect new data and fresh insights to help stay ahead of the competition.

It’s even more important for marketing agencies to overdeliver in a year of economic uncertainty—that’s why 81% of agency marketers surveyed in our [2023 Outlook for Digital Marketing Agencies](#) think client retention will be more challenging in 2023 than it was in 2022. It’s also why 51% of marketing agencies say they are planning to [adopt new tools/technologies to prove campaign ROI](#).

But your agency has a chance to add even more value. While most digital marketing agencies can tell clients a lot about customer behavior and trends in web activity, your agency can go the extra mile by providing the same depth of insights into customer calls.

Sure, most agencies know that someone called from a click-to-call link. But they’re probably missing insights into who called, what happened, and why.

With Conversation Intelligence® from CallRail, your agency can put call insights for your clients on autopilot with automated recording and transcription, powerful rules to monitor campaign performance and customer sentiment, plus AI-powered Call Highlights to uncover trends and issues faster than ever.

In this guide, we’ll help you understand how your agency can transform your clients’ conversations with customers into insights that improve everything from Adwords keyword bidding to customer interactions with sales reps.

# Call data is more important than ever

Marketing agencies that have been around for a few years know that today they have less data than before to create audiences and campaigns with. That's because the slower-than-expected death of third-party cookies and the rise of consumer privacy regulations are taking away a key source of insights into your clients' target audiences.

As a result, first-party data—data collected directly from interactions between your consumers and your clients—is more important than ever. Without third-party cookies, your agency needs more insights from first-party sources to help clients understand their audiences and the customer experience.

## What can your clients really learn from calls?

Calls are incredibly rich sources of information.

First, there's a wealth of metadata around call interactions. How long is a call? Does it generate a lead or a sale? How qualified is a lead? How are agents performing? What time of day do most calls come in?

Once you get into the calls themselves and start to analyze the words with Conversation Intelligence, you'll really start to find the insights that will impress your clients.

### You can learn things like:

- Why someone called in
- Whether someone is happy or unhappy
- Emerging issues based on keyword trends
- Trending terms specific to your clients' industries

Without the right tools, though, unearthing these insights from anything more than a few calls a day can be impossibly time-consuming and costly. Relying on agents and reps to recollect details after a call or trends after a shift isn't efficient or accurate—you don't want insights for your clients to be based on a game of telephone.

Let's dive into the ways Conversation Intelligence can help solve some of the most common challenges that keep marketing agencies from delivering call insights to their clients.

# Solving three common call data analytics challenges

In the era of data-driven businesses, marketing, sales, and support leaders realize the value of analyzing what customers and employees are saying. But without the right technology in place, marketing agencies run into three common challenges when it comes to analyzing calls: it's too time-consuming, the data isn't accurate, and slow time-to-value diminishes the value of insights.

Let's take a look at each problem and how to solve it.

## 1 Inefficient manual transcription & analysis

### **Problem:**

Modern marketing agencies know the importance of tracking the keywords driving every call and uncovering trends that are driving interest in products or emergent issues. It's easier said than done, though.

No one expects sales and customer service reps to transcribe and analyze their own calls. If you want to transcribe and analyze every inbound and outbound call for your clients manually, you'd need a small army.

Or, for many agencies, like [Wit Digital](#), who specializes in digital marketing, they were outsourcing their call analysis to an overseas vendor whose team manually listened to each call and categorized them to help qualify leads. But that inflated the costs per lead above the industry average.

*We were using an overseas company to manually listen to, tag, and qualify our calls. Now we use CallRail's Automation Rules to automatically tag and qualify calls. We have been able to eliminate our overseas company entirely, saving \$4,000 a month."*

**—Ryan Cook, Director of Client Strategy, Wit Digital**

**Solution:**

When Wit Digital tested Conversation Intelligence against their overseas vendor, they found that Conversation Intelligence outperformed them across the board. Conversation Intelligence helped solve the inefficiencies in several ways.

Automated call recording and transcription eliminates an incredibly time-consuming manual step. Then, there's the behind-the-scenes engine helping to spot keywords and create trend lines that gives your agency a near real-time snapshot of each call. Lastly, automation rules help automatically classify, qualify, score and assign a dollar value to each call with criteria you can adopt for each of your clients' unique industries and needs.

Eliminating these inefficiencies not only got Wit Digital better results, but by using Conversation Intelligence, they saved over \$4,000 per month compared to using a vendor. It also drove lead costs down by 64%.

## Key Conversation Intelligence features to reduce inefficiencies

### Call transcriptions

Get transcripts of calls in near real-time for replay and review within Call Tracking's call log. Automatically protects personally identifiable information to maintain compliance with HIPAA, PCI, and other PII standards.

### Automation rules

Scale your call insights with Automation Rules. Automatically tag relevant calls based on keywords spoken by customers or employees and sort them into predetermined, custom categories using your own criteria and keywords.





## 2 Inaccurate data

### **Problem:**

Your agency can use call transcripts to deliver a lot of high-value insights to clients that help with the entire customer journey life cycle, from optimizing lead gen campaigns to improving sales conversions and training customer support. Accurate data is critical when it comes to these touchpoints.

However, manually transcribing and analyzing calls is not only inefficient, time-consuming work. It is a recipe for inaccurate data.

Consider what it would take for your agency to manually mine call data for insights. First, someone would have to review the transcript. Then, they would have to highlight and correctly tag the key terms. And then they'd need to move that data into a spreadsheet and decide —probably on a whim—how that call is classified.

For Ryan Cook and Wit Digital, inaccurate data was another reason for them to move away from their overseas vendor, as only 65-75% of calls were being correctly categorized by lead status. Those misclassifications can cause bad customer experiences and missed opportunities.

The Mantic Media Group has also found significant value in having CallRail analyze its calls for insights.

*"CallRail enables us to track nearly every aspect of our digital and traditional media efforts for our clients. Not only does it show us which keywords and Ad groups are performing the best for search marketing, it always enables us to help our clients determine an optimal budget and the channels they should be investing their marketing dollars towards. We are also able to use the Call Transcripts to help improve the sales process and determine which leads are qualified and which are not."*

— Andrew Mimault, Mantic Media Group

### **Solution:**

Humans get tired throughout a long shift; Conversation Intelligence doesn't. And its accuracy doesn't falter either.

Conversation Intelligence's automation rules streamline the entire laborious process using the unique criteria you set for your clients. For example, your agency can have Conversation Intelligence monitor for keywords that customers say that help determine what ad campaign drove the call.

By using those keywords to apply unique tags and automate the classification and qualification of leads, Conversation Intelligence not only ensures the results are 100% accurate, but it makes it easier for your agency to make sense of the data to find the right signals in the noise. If a customer mentions “Toyota Camry,” for example, and your auto dealership client has several of this model they are trying to sell, Conversation Intelligence can automatically tag the caller as a hot lead.

By eliminating a major source of inaccuracies (sorry, humans, you’re good at other things), your agency can focus on other things, like optimizing marketing keywords for your clients.

That’s what the [Centeno-Schultz Clinic](#) did with Conversation Intelligence. Thanks to accurate call transcriptions and classification, they were able to home in on specific keywords in customer call transcriptions, see how many callers mention that same keyword to understand callers better and improve their marketing for similar patients as well as better serve those already in the funnel.

## Key Conversation Intelligence features to reduce inefficiencies

### Key terms

Eliminate the labor-intensive process of identifying individual key terms as well as their frequency in each call. Improve data accuracy by removing the manual aggregation and analysis of key term use and frequency.

### Automation rules

Eliminate arbitrary classification with custom rules that help clients accurately determine whether a call is a qualified lead, a conversion, happy, unhappy and more.



### 3 Insights are too slow

#### **Problem:**

When it comes to manual call analysis, inefficiencies and inaccuracies are frustrating. But nothing is more frustrating than getting it all right but coming to an insight too late to matter.

Unless your agency is listening and reporting on your clients' customer interactions in real time, there will be some insights from calls that your clients will wish they had sooner. Not fixing failing sales scripts, identifying emerging product issues, or improving service reps training fast enough can have costly consequences for your clients.

As Vlad Kandybovich, CEO of Qshark Moving Company, grew his company, he wanted to record and review every customer call for quality assurance. But with up to 84 calls a day, the CEO was spending hours a day just listening to calls. It was an impossible task and meant some customer service issues were left unaddressed too long for the customer-centric CEO.

*"I listened to every call to see if we were handling inquiries correctly and look for areas to improve. But we can easily get 84 calls a day, and I was spending hours upon hours listening to call recordings. It was just too much."*

— Vlad Kandybovich, CEO Qshark Moving Company

#### **Solution:**

By trading in hours of listening for Call Tracking with Conversation Intelligence, Kandybovich shortened the quality assurance process by 90% and accelerated his time to insights.

Conversation Intelligence was able to help him automatically score calls and identify keyword trends in customer interactions at-a-glance. With these insights, he could focus on enabling his teams to provide better service and the right information instead of listening to calls.



Like Kandybovich, your agency can't listen to your clients calls in real time. Conversation Intelligence can, though, and will continuously monitor for trends in customer and employee interactions.

Call sentiments reveal customer sentiment in real-time and help agencies show they're delivering quality leads more quickly. With call summaries, Conversation Intelligence analyzes thousands of calls with artificial intelligence to identify trends and present short synopsis of the calls to help you identify coaching and marketing optimization opportunities for clients.\*

*"With Conversation Intelligence, I can quickly scan and make sure agents are being polite and giving the right information to customers and leads. It's way more efficient... The dashboard is simple to understand and use. I also like having key data points emailed to me automatically every week for comparison purposes."*

— Vlad Kandybovich, CEO Qshark Moving Company

## Key Conversation Intelligence features to reduce inefficiencies

### Call sentiment

View customer and staff sentiment in real time or retrospect to help your clients train their teams to provide better customer service and to help you better identify high-quality leads for clients.



### Call summaries

AI analyzes calls for trends and creates a short synopsis of call transcripts for quick review that can be filtered by campaign to surface the types of conversations your marketing is driving and identify opportunities for frontline team coaching, saving your clients time and money.

#### Call Summary:

A lead from a campaign calls to get a new pest control servicer. Rep asks about what kind of pests, home address, and how long the pest has been noticed. An appointment is scheduled with the technician.

#### Call Duration:

6m 21s



# Conversation Intelligence gives your agency an edge

Not long ago, most agencies would have to think long and hard about mining calls for insights. But with artificial intelligence that transforms time-consuming, mind-numbing work into a simple, automated solution, your agency can deliver action-worthy nuggets that will help improve your client's customer service, train their sales staff, optimize their marketing spend, and put them on the bleeding edge of consumer preferences.

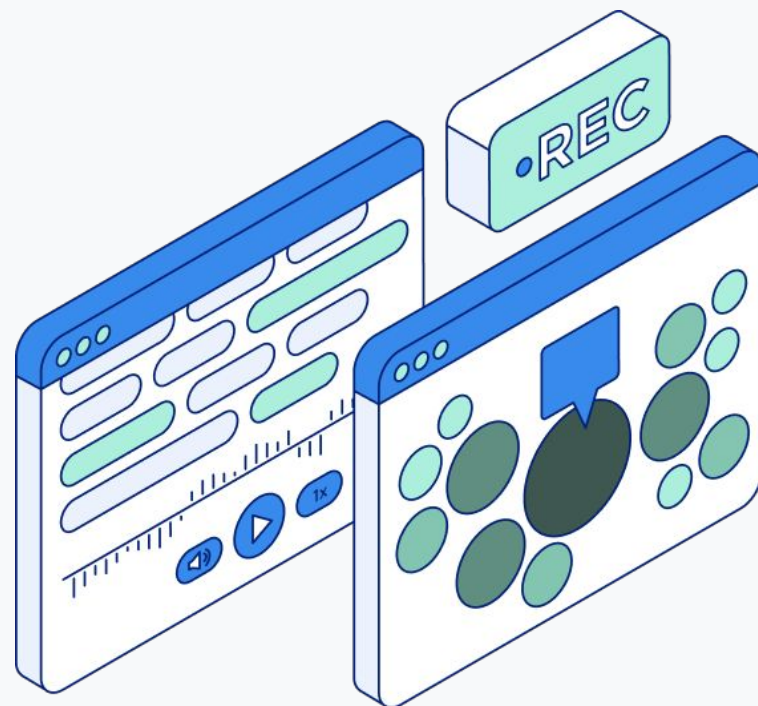
For agencies, what makes Conversation Intelligence such a difference maker is how effortless it is to deliver massive value to clients.

## **One solution provides your clients with:**

- Automatic call recording and transcripts
- Effortless keyword spotting and frequency
- Automatic, customized call scoring
- AI-powered call highlights
- Actionable training insights for sales and customer service teams
- Real-time monitoring of customer intent and mood with automation rules
- A robust, intuitive reporting dashboard to uncover new insights for clients

Insights into what customers are saying represent one of the biggest missing pieces for many companies. While your agency probably has digital marketing insights already locked down, Conversation Intelligence is the only way you can unlock insights directly from the voice of the customer at a massive scale and in real time.

Many agencies may be forecasting more difficult times on the horizon. But for agencies that adopt Call Tracking with Conversation Intelligence, at least one difficult thing will be easy. And that could make all the difference.



# Upgrade your insights with Conversation Intelligence

Give your agency the power-up it needs to retain and gain more clients. Go beyond simple call tracking by upgrading to Conversation Intelligence. Unlock automated insights from calls that will help your clients optimize every part of their business.

See how easy it is for Conversation Intelligence to take your agency to the next level.

Start a free trial today