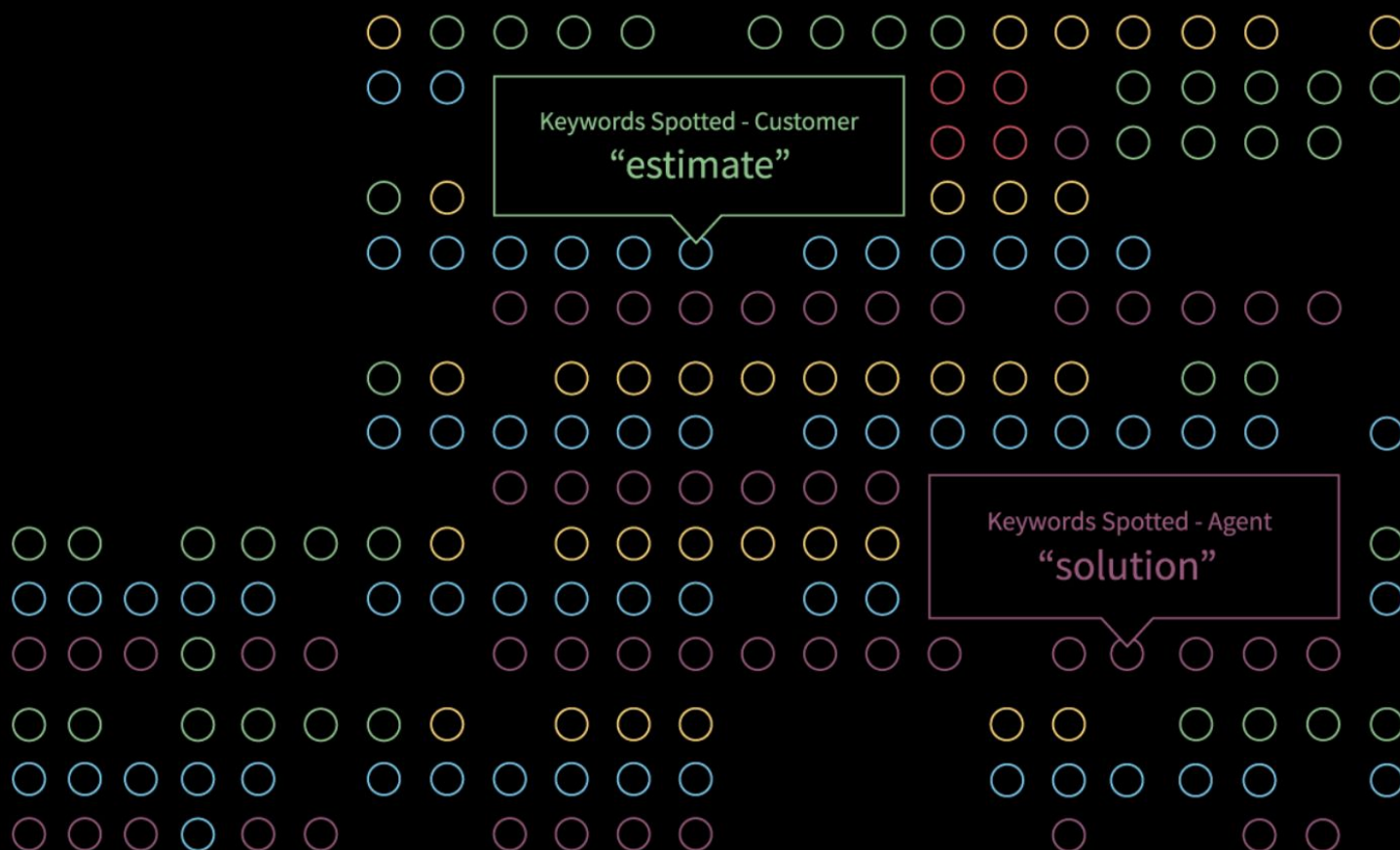




Get better call insights  
and boost your marketing  
with automation



Highlights:

ASAP whistling diagnoses

# Knowledge is power when it comes to marketing.

Marketers must know what their target audience wants, thinks, and needs — and how they behave. They must know which aspects of their marketing are working effectively. Conversely, they need to identify existing strategies that are failing to provide an effective return on investment (ROI).

Despite the explosion of customer service channels in recent years, such insights are more commonplace on one channel than perhaps all others: phone calls.

Sure, calls have been around for years — and they might not seem as exciting as setting up a live chat service on your site. But this doesn't make them any less valuable for businesses. Your phone calls contain a treasure trove of information, helping you understand who your customers are, what they think of your business, and, ultimately, how you can help them.

Isn't this what marketers want to find out?

Phone calls on their own are hard to analyze at scale. Key insights can go unnoticed unless reps happen to scribble down important phrases from each call. You could record calls, but this presents its own issue: You then have to listen through them in their entirety to glean crucial nuggets. This is time-consuming and virtually impossible to do at scale.

Fortunately, there's a better alternative: conversation intelligence.

This guide will:

- Explore how AI transforms calls with previously unknown insights into your target audience and the buying journey.
- Dig into various applications for conversation intelligence through specific use cases.
- Provide case studies on how companies unlock greater marketing ROI.

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# Why are calls so important?

Calls aren't going anywhere. They're still many consumers' go-to mode of contact.

Consumers like being able to speak to another person. They appreciate receiving immediate responses, and it's helpful that the person on the other end of the line can intuitively pick up on their tone of voice. Humans have been communicating with one another for millennia — it's hardwired into our DNA. Machines can't provide the same communication experience as speaking with an actual human.

Communication is especially important for industries that boast a high degree of professional expertise. If you're researching a medical procedure or are about to embark on a tricky legal matter, then you want to talk to somebody. Chatbots and forms cannot give you the advice you need or provide you with an idea about whether or not this provider will truly have your best interests in mind. So what do customers do? They place a call.

According to Google research, [61% of consumers](#) call when they're in the purchase phase of the buying cycle. This is great news for marketers — they get to tease out more information from their callers than they might provide over other digital contact channels.

The pandemic further [strengthened consumers' preference toward picking up the phone and calling](#) — this isn't surprising when you consider that businesses were dealing with [record call volumes](#) toward the beginning of the pandemic. Even when the pandemic is behind us, phone calls will still be an invaluable way for consumers to learn more about businesses.

[IBM research](#) suggests 1 in 4 consumers in the U.S. and the U.K. no longer feel safe shopping in-store or find the in-person shopping experience enjoyable. [Almost half](#) of the U.S. population now feels uncomfortable with resuming person-to-person interactions. Remote communication is here to stay — meaning consumers will continue to make calls.

Fortunately, this represents a massive opportunity for marketers. They can dig into who their consumers are, what they want, and what they need. They can understand more about which marketing is driving effective inbound leads. They can figure out which products they need to develop, how their consumers' pain points are changing, and how consumers talk about the industry — the language and messaging that truly resonates with them.

# Where conversation intelligence comes in

Nowadays, it seems like AI — once the perennial “next big thing” — is everywhere we look. It powers Spotify’s and Netflix’s algorithms, gives us on-the-go weather predictions, and now powers conversation intelligence in marketing analytics solutions.

According to G2, “Conversation intelligence (CI) software records, transcribes, and analyzes sales calls. Through analyzing sales calls, CI software can identify keywords and topics of conversation so users can quickly jump to those points in the recorded sales calls and further analyze valuable insights.”



Conversation intelligence tools boast 10 main benefits. They allow organizations to:

1. Review calls at a glance.
2. Access aggregate lists of calls tied to a specific category.
3. Never miss a lead.
4. Understand their buyer/customer intent.
5. Automate quality assurance processes and lead categorization.
6. Visualize rep performance and make sure they’re following talk tracks.
7. Surface key training opportunities.
8. Surface new business opportunities and trends.
9. Improve their keyword bidding strategy.
10. Understand which sources and campaigns are driving high-value leads and which of *those* are converting into customers.

Brands can also use conversation intelligence to fully or partially automate conversations at scale. For instance, during the pandemic, many businesses couldn't respond to the number of inbound calls they were receiving. With the help of conversation intelligence, they could at least set up automated messages explaining whether or not they were open — and if so, when — or to answer any other range of questions that their target audience might have.

Conversation intelligence solutions (especially when used in combination with call tracking) ensure that businesses and their prospects/customers derive as much value from calls as possible. In the next section, we'll outline why call tracking and conversation intelligence can be marketers' go-to tools — helping them enhance their customer service and transform their bottom line.



# The value of call tracking and conversation intelligence

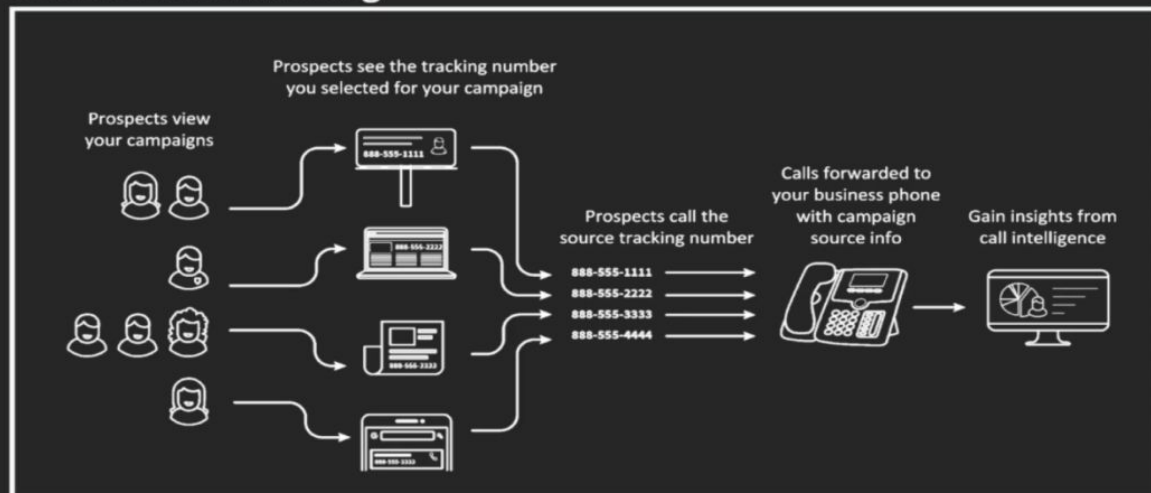
You've likely heard of [call tracking](#) before. This technology allows marketers to directly track where each of their callers came from — in other words, the marketing channel that inspired them to pick up the phone and call the business.

Call tracking lifts the lid on how effective your marketing is. Since phone calls are such a valuable source of inbound communication, you can directly map out which marketing efforts are generating valuable inbound leads. These insights can be put to good use, allowing you to double down on successful marketing efforts and avoid subpar strategies.

Conversation intelligence goes one step further. Call tracking links inbound calls to your marketing efforts. Conversation intelligence analyzes what consumers say on the phone and, ultimately, what they want from your business.



## Source-Level Tracking



# The benefits for agencies, SMBs, and their employees

Let's explore the benefits that businesses can expect when they adopt AI-powered call tracking and conversation intelligence.

## 1. Better understand buyer intent

CallRail's [Call Tracking](#) can record every calls,... provided you've turned on this function. This frees you up from having to frantically write down everything a caller says. But while you can capture everything that was said on a call, there is one hitch: You then need to relisten to all your calls later on.

Picture this scenario: You take a call out in the field while working on a job, but you're on a tight schedule and distracted, so you can't give the caller your full attention. Later, you don't remember exactly what it was that they were looking for or when they needed it done by.

You tell yourself that you'll listen to the recording again when you're back in the office, only you keep getting new calls every day for the rest of the week. When you've finally finished the urgent job, you now have to relisten to all those phone calls.

Fortunately, CallRail's [Conversation Intelligence](#) tools free you from the time-consuming manual activity of individually listening to every call, and they go one step further than simply recording calls. The best options include [Transcript](#) features that automatically transcribe calls on the go, meaning you can quickly skim your call transcriptions instead of having to listen to the calls in their entirety. No buyer's intent will ever go unnoticed or forgotten again.

Here's another scenario: You're busy, and the phone hasn't stopped ringing. Reading call transcripts is probably quicker than listening to recordings, but wouldn't it be great if you could quickly learn what terms prospective customers are using to inform your marketing efforts?

With [Key Terms Spotted](#) from CallRail's Conversation Intelligence tool, you can. Note: You'll need to first set up [Automation Rules](#) before you can create your Key Terms Spotted report. AI will automatically scour your call transcripts and pull out relevant keywords or phrases. For instance, if you're a cosmetic dentist, these might include "book a consultation" "reconstructive dental work," "veneers," etc. You can use Automation Rules to pick and choose the keywords that Conversation Intelligence should look for, diving right in by selecting from a range of pre-made templates.

If you're a visual learner, you can also choose to see each call's keywords in a bar graph or a word cloud. No more relistening to calls in their entirety.



No more reading lengthy transcripts. Instead, you can simply see a detailed bar graph or word cloud and instantly get to the bottom of what each caller was talking about — and more importantly, what they want.



If you can better understand your buyers' intent, you can more effectively serve them. This will enhance their customer experience, drive increased revenue, and lead to long-term customer loyalty.

## 2. Improve your marketing performance

Are you reverse-engineering your marketing? If not, why?

To understand what your prospects care about, what they're struggling with, and what they're looking for, you have to listen to them — in detail and at scale.

Then you need to harness these insights when creating your marketing strategy.

Going on gut feeling is no longer enough. Consumer behavior is changing on an almost daily basis, so you must keep an ongoing tab on what your target audience is telling you.

Imagine you're an orthodontist. Metallic, unsightly braces used to be the norm — but the rise in clear aligners means that you should instead focus on promoting these newer alternatives. However, unless you're actively listening to what today's consumers want, you'll be unable to attract them to your business.

Conversation Intelligence's features reveal previously unknown insights, helping you get closer to what your customers want. Key Terms Spotted is great if you already know what you're looking for — but you don't know what you don't know. This is where [Call Highlights](#) comes in. It uses AI to identify words or phrases that are important to you but that you haven't selected yourself.

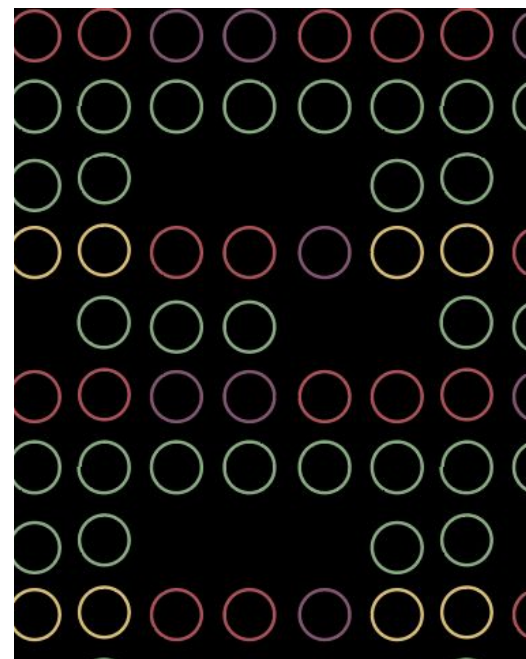
Let's take the example above of an orthodontic practice. Key Terms Spotted might be set up to reveal any instances where “braces,” “Invisalign,” and so on are mentioned. But with Call Highlights, you'll see that many callers don't mention any of these words — instead, they say words and phrases like “invisible braces,” “clear aligners,” and “ones you can't see.”

You can then use these words to improve your own messaging, making it more closely aligned to how your target audience speaks. Your website and marketing materials will be uncannily similar to how your audience thinks and talks about their pain points and desired solutions. They'll jump out and grab your prospects' attention.

Call Highlights also transforms your keyword bidding strategy and pay-per-click (PPC) advertising performance. Invisalign might be the brand that offers invisible, clear aligners, but if a large portion of your prospects have never even heard of Invisalign, then that won't be what they search for.

By tweaking your strategy to instead bid on phrases like “invisible braces” and “clear aligners,” you’ll attract a ton of new prospects.

Your customers are the key to your marketing success. AI-powered conversation intelligence unearths how they speak, what they're struggling with, and what they want. Use these insights to create more effective marketing materials going forward.



### **3. Improve your reps' training**

Your reps need to be excellent communicators. The benefits of powering Call Tracking with Conversation Intelligence go out the window if prospects have a bad experience when they do get through to an agent at the end of the line.

But you're busy trying to run a successful business. You can't hold reps' hands at all times. It's unfeasible. With our AI-powered Conversation Intelligence solution that generates complete Call Transcripts, however, you can automatically capture every single interaction that your reps have with customers.

Key Terms Spotted allows you to instantly see what high-performing reps do consistently. For example, you can conduct sentiment analysis by setting up Key Terms Spotted to look for any instances where customers mention words typically associated with upset callers (and use this as a way to instantly track or tag the call.) Likewise, you can use this functionality to identify keywords that indicate when callers seem happy. Dive in and analyze why they're so pleased to better understand what your top reps do that other reps don't. You can pick apart key conversation flows in detail, figuring out which precise words or phrases appeal to your target audience.

Perhaps you want to figure out precisely *when* a warm lead becomes a hot one, or *why* people who seemed so interested at first suddenly hit you with, “Well, thanks for your time, but I’ll call you back if I want to proceed.” Conversation Intelligence’s comprehensive range of AI-powered features will help you get to the bottom of these subtle yet powerful call dynamics.

Imagine you’re a roofing company. You’ve trained reps to highlight on the phone how quickly your roofing team performs services. Your marketing strategy is taking off and your phones are red hot. Despite this, your inbound call conversion rate is still pretty low.

You decide to check out what’s happening using Conversation Intelligence. You instantly dig out the moment in every single call when your reps use the words “speed,” “quick,” “rapid,” “out of your hair in no time,” and so on.

For some callers, this is precisely what they wanted to hear — and they’re instantly convinced that your roofing company is exactly who they need to work with. For others, however, they suddenly seem less assured. But why? You dig into their initial buying intent, focusing on the reason why they’re calling.

When callers want a quick job (such as a small part of their roof to be patched up), they don’t want to wait around. But for bigger jobs, the opposite seems to be the case.

If their entire roof needs to be fixed, prospects *expect* it to take a while. It’s a big task — and it’s crucial you get it right. Therefore, promises that you’ll be done fast might not appeal.

Conversation Intelligence unearths what prospects resonate with and sheds light on what they are like so you can train your reps to be as effective as possible.



## 4. Qualify calls

Plenty of customers will get in touch with you because they want to scope out their options. They'll ask questions about your price right away and will seem disinterested in your specific features, unique selling points, or hearing about previous customer case studies. Once you've given them a very brief overview of what you do, they're quick to politely end the call, saying they'll get back in touch soon.

These prospects are still valid, but are they going to purchase from you any time soon? Likely not. So while you should still follow up, you should prioritize serving prospects who are genuinely interested in your offerings; these are qualified leads.

Conversation Intelligence makes call qualification a breeze. With AI-powered Automation Rules, you can automatically set classification and qualification rules for leads whenever a certain keyword or phrase is mentioned. This leaves you with more time and energy to focus on converting — not qualifying — your prospects.

### Classification Criteria

- ☐ Score all calls  
☒ Score specific calls

Number	Call Type	Minimum Duration	Tag
All Numbers ▾	All Calls ▾	Any Duration ▾	Sales × or + Tag

Save



## 5. Speed up your sales cycle

You've used Call Tracking, Conversation Intelligence, Key Terms Spotted, and Automation Rules to better understand your buyers' intent. You've fed these insights back into your marketing strategy, honing in on strategies that have the greatest impact. Your reps have been trained to communicate most effectively. You can now instantly and automatically qualify calls with minimal effort.

But these benefits don't work in isolation. They're the key elements that inform the length of the sales cycle — how long it takes to attract, nurture, and close leads. The quicker you can do this, the more time you have to focus on other leads and the lower your customer acquisition cost.

Time is money. If your reps have to go through a long, drawn-out process to convert individual customers, then this will quickly eat into your marketing margins.

Call Tracking, Conversation Intelligence, and Key Terms Spotted (powered by Automation Rules) have revealed the marketing that your customers love — so you've doubled down on your best strategies. Your phone is ringing off the hook. Reps are charming, polite, and seem to give callers their full attention. The prospects who seem less interested are instantly qualified, categorized, and put on the back burner for now.

The results? Less time, effort, and money spent acquiring, nurturing, and converting leads. This added time and focus can now go into serving customers rather than speaking to prospects. Your customer experience goes through the roof, leading to higher retention rates and more money.

Powering up Call Tracking with Conversation Intelligence will speed up every single aspect of your sales cycle. In turn, this will optimize your day-to-day operations, with the compounded effects touching every single part of your organization.

# The benefits for prospects and customers

The customer experience is the make-or-break factor that dictates whether or not a business succeeds. Eighty-six percent of consumers will pay more for a superior experience, which is why 89% of companies consider customer experience a primary competitive differentiator. So how can you boost your customer experience while *minimizing* the amount of time you spend transcribing and analyzing calls?

Embracing AI-powered call insights will help your reps master the art of communication to transform your customer experience.

## Communicate your way to a great customer experience

If you call a company and you don't feel like they're even giving you the time of day, would you decide to do business with them? It doesn't matter that the only reason the rep seems distant is that they're trying to write down everything you're saying.

This is a massive customer experience red flag to the person at the end of the line, as vague "umms" and "aahs" make it seem like they're just not listening.

The Call Transcripts feature within Conversation Intelligence takes your call recordings and instantly transcribes them so reps can give callers their full attention. By actively listening to callers, reps can better tailor their communication — and the products, services, and recommendations they suggest.

Customers want to speak to polite, knowledgeable, and attentive employees. Reps will know precisely what each caller is looking for and can reference marketing materials they've engaged with to better know how to help them.

Of course, tools are only one piece of the puzzle. Reps can have access to the latest, most innovative AI-based call insights, but they still need to be excellent communicators. They need to know how to empathize with customers' pain points, what customers respond to, and how to offer up a solution (by selling their services).

## The results?

From marketing to sales, everyone in your organization will deliver a consistent message. You'll speak the same language — your prospects' language. By ensuring that everyone within your organization is aligned with the same messaging, you'll create a consistent, enjoyable customer experience. And when prospects search for potential providers, your company will instantly stand out, because your marketing will mirror consumers' thoughts, concerns, and language.

# How two forward-thinking companies embrace AI-powered call insights

Let's look at two examples of the specific benefits companies gain when they implement tools that provide AI-powered call insights.

## QShark Moving Company

When [QShark Moving Company came to CallRail](#), they were struggling to stay on top of 80+ calls a day. They'd implemented a call recording solution but quickly realized this wasn't going to be enough.

### Challenges:

- 15+ hours a week listening to call recordings.
- Tracking calls from origin to conversion across multiple platforms.
- Not enough time to focus on serving customers.

In the beginning, CEO and founder Vlad Kandybovich handled all incoming calls himself. He quickly realized that this wasn't sustainable, so he began to route incoming calls to other members of the team who were out in the field.



However, he needed to make sure that all calls were being handled professionally. This meant that he had to record every single call and listen back to them in their entirety,

The company was investing in several different marketing strategies, so Kandybovich needed to understand which of these activities were successfully driving customer calls. As he stated, “The level of detail you get on these platforms varies a lot. And if you advertise on many different platforms, your information is spread all over the place, making it difficult to draw insights.”

They tried a few solutions, but none of them fully met QShark’s needs. The solutions were hard to set up and difficult to master, and it was impossible to get in touch with someone from customer service.

Fortunately, they decided to give CallRail’s comprehensive range of AI-based call insight tools a try.

### **Solutions:**

- Call Qualification to automatically score and classify calls.
- Automated Call Transcription to instantly transcribe calls.
- Automated Rules to find words and phrases in customer interactions.
- Call Tracking and Form Tracking to track all call conversions.

They managed to reduce the time it took to complete quality assurance by 90% and could now analyze every single call that came in. Thanks to Form Tracking and Call Tracking, they’ve also managed to optimize their marketing and bring in even more leads than before.

Kandybovich couldn't be happier: "Today, I'm spending less time monitoring calls and more time serving our customers — which is the way it should be."

### Results:

- 90% less time spent on quality assurance.
- A more thorough analysis of call recordings.
- Data-driven insights into how well each advertising platform is performing.

### Wit Digital

[Wit Digital's](#) client marketing was doing great — their client leads were streaming in. Unfortunately, they were struggling to qualify these leads accurately and efficiently. They were already recording calls using CallRail's Call Tracking solution, but then they would send these recordings overseas, and a third-party vendor would manually listen to the calls and categorize them.

The process still required plenty of handholding from Wit Digital's Director of Client Strategy, Ryan Cook. "Our overseas vendor couldn't pick up what we were putting down. We would explain what we were trying to do — but they never really got it."

This was unsustainable and inefficient. So [they decided to see what else CallRail](#) had to offer.

### Challenges:

- Unable to quickly and effectively qualify leads.
- Cost-per-lead sitting well above the industry average.
- Overseas vendor cost \$2,500 - \$4,000 per month, but with only 65%-75% call categorization accuracy.

### Solutions:

- Implemented Conversation Intelligence, which immediately performed better than the overseas vendor.
- Used the filtering options to good effect (e.g., if a first-time caller is on the phone for more than 60 seconds, they're very likely to be a qualified lead).

### Results:

- \$4,000 saved per month.
- 64% lower cost-per-lead.
- New insights into their marketing performance.

Cook is incredibly happy with the results of using CallRail to its full potential: "With Conversation Intelligence, I have new insights into what's working in our campaigns and what's not. Sometimes even a simple word change can make all the difference."



# Key insights are hidden within your calls: Unlock your treasure trove today

Calls are a gold mine for marketers. By embracing CallRail's all-encompassing platform — including Call Tracking, Conversation Intelligence, Automation Rules, and Key Terms Spotted functionality — and implementing the advice offered throughout this guide, you can access this gold mine and:

- Eliminate virtually all the time you currently spend poring over call transcripts, analyzing their contents, or worrying about call qualification.
- Create marketing materials that resonate with customers. When they do call, your reps will swiftly reassure them that your business is the answer to their problems.
- Enhance your customer experience — leading to higher retention rates, better customer satisfaction, an improved reputation, and more revenue.

Contact CallRail today to sign up for a free trial of our AI-powered tools.

[Start Free Trial](#)

## CallRail