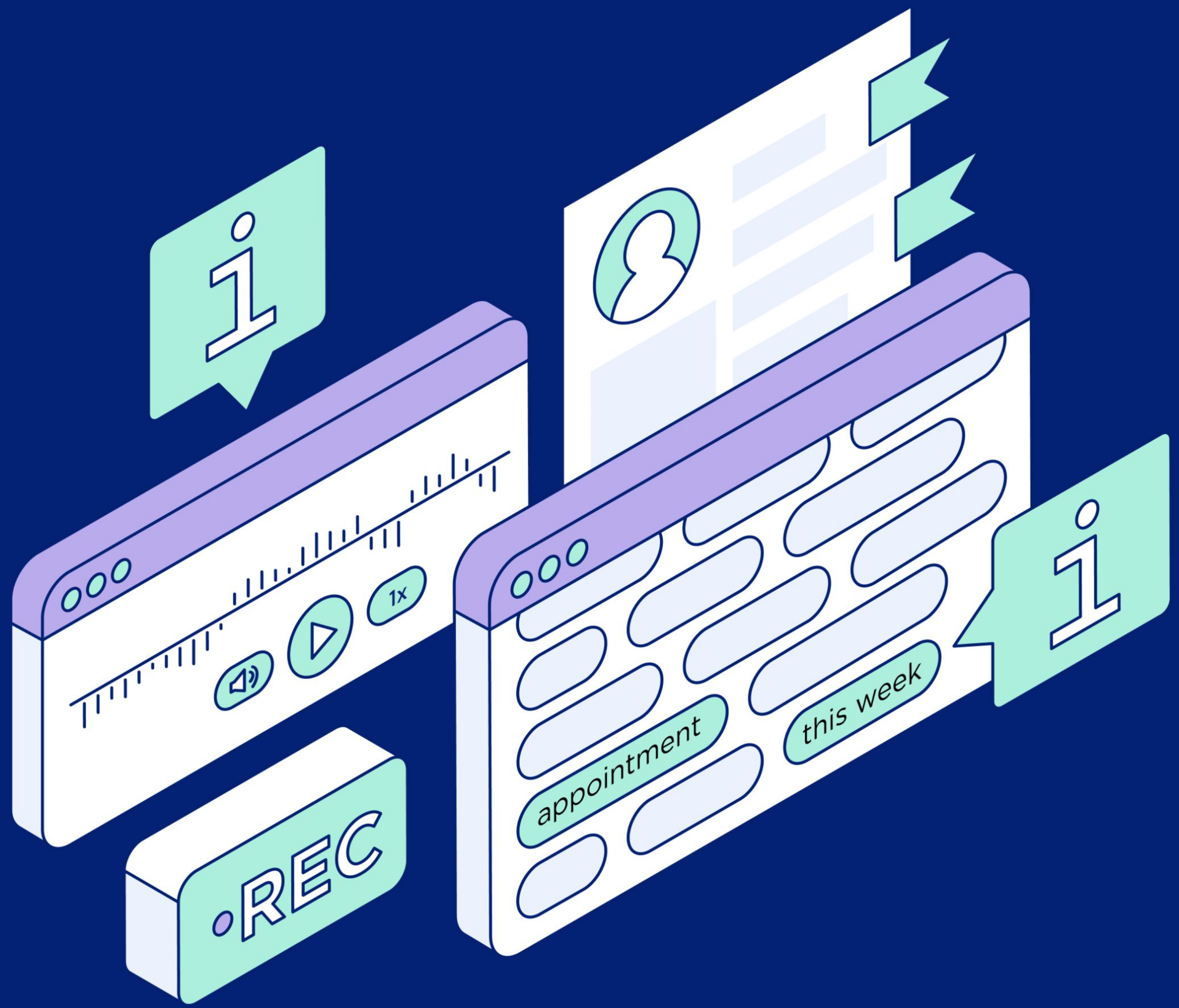
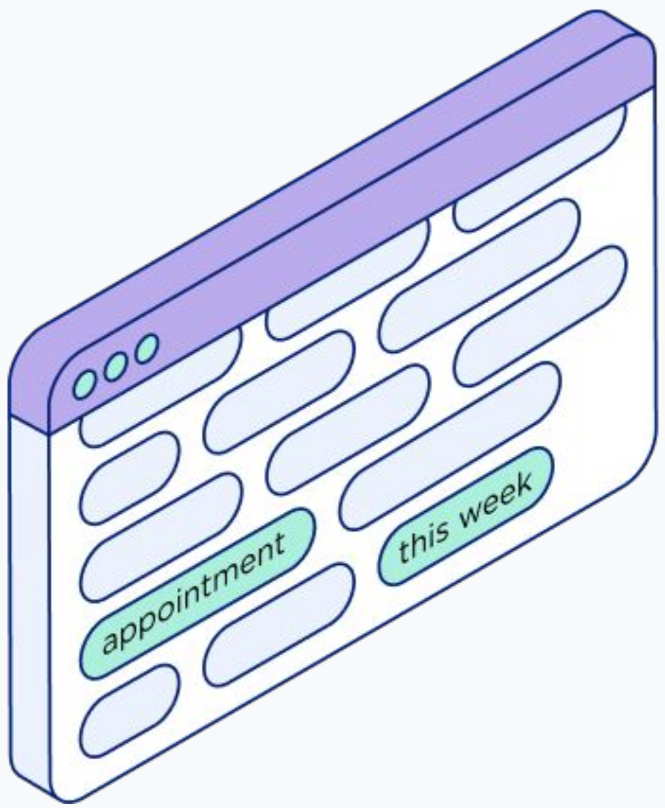
The small business guide to using Conversation Intelligence



Conversation Intelligence® extracts valuable insights from your calls

For many small businesses, one of the most common ways you communicate with customers is through calls. Being able to review those calls – long after you hang up the phone – not only makes it easy to keep track of key details from the conversation so you can provide better customer service, but also makes it quick and easy to make sure you capture the details you need for nurturing and closing business or following up on an issue.

And the best news? You no longer have to spend hours tediously reviewing every call recording. Instead, with Conversation Intelligence we automatically tell you what happens on your calls, which callers are likely to be your best customers, and which marketing channels get the best results. This allows you to better train staff, prioritize your most important calls, and improve your marketing efficiency.



Get an automated, detailed analysis of your conversations

Our Conversation Intelligence engine automatically qualifies phone leads on your behalf by transcribing, summarizing, and analyzing the sentiment of your inbound calls. Using specific details about your calls, we'll show you which callers are leads and which keywords were used during your calls. For example, Conversation Intelligence can show you which customers are looking for a specific product or interested in a service demo.

Spot trends and opportunities

Your calls give you insights into what is important to your customer and what they're looking for. More than half of consumers **(59%) report using Google** to research a planned purchase, whether online or in-store. By using call transcripts to identify keywords that are important to your customers, you can create more relevant online content and more effective digital ads.

Using your call transcriptions, we'll instantly categorize and score your calls and identify keywords that are meaningful to your small business. We will also provide quick-view summaries with real-time sentiment to make identifying opportunities more efficient.

Each call recording we capture is a dual-channel recording. This means we've separated the caller's side of the audio from your employee's side of the audio and isolated background noise before our system transcribes the call.

In this quick getting started guide for Conversation Intelligence, you'll learn:

- **How to set up Conversation Intelligence**
- **Best practices for analyzing the data you collect**
- **How to download and report on the transcriptions**

Conversation Intelligence automatically prioritizes leads, identifies keywords, and scores, tags, and qualifies leads. However, if you need information that is even more in-depth, CallRail's new add-on solution, Premium Conversation Intelligence, provides Call Summaries and Call Sentiment to give you a quick but revealing look into both sides of a conversation. You can use these insights to improve dialogue and increase conversions.

SECTION ONE

Setting up Conversation Intelligence

Conversation Intelligence is a suite of features that enable you to better understand your lead quality. Throughout this guide, we'll show you tips and tricks for setting up and maximizing each aspect of using Conversation Intelligence.

In this section you'll learn how to set up:

- CallScore
- Transcripts
- Keyword Spotting for Calls, Texts and Forms
- Tags for Calls and Form Submissions

All of our conversation intelligence technology is powered through call recordings. Before we begin, ensure you have call recording turned on for tracking numbers that you wish to use these features on. For more information on setting up call recording, read these instructions.

CallScore

Qualify and score calls automatically with CallScore

CallScore utilizes our automated conversation intelligence technology to qualify and score calls as soon as they end. Our specialized Conversation Intelligence engine discovers the marketing campaigns bringing the most valuable leads to your business so you can understand how your inbound calls turn into appointments, opportunities, and sales.

With this data, you can make better marketing decisions. Peter Colon, a small business owner and Co-founder and President of **Stress Free Health Options**, said, “CallRail is real time, quick intelligence — not 30 days from now. We see which ads work. Every week we throw out the losers and reinvest in the winners.”

Once a call is automatically scored, you can see the caller’s score within your activity dashboard, email notifications, and call details pages.

For tracking numbers that use CallScore, Call Recording will need to be enabled. Follow these **instructions** where you’d like to activate CallScore. Once you’ve activated CallScore for your account, you can view and change any call’s score from your call log, caller timeline, or Lead Center.

Use this set of instructions to learn how to find or update a call’s score on the log.

Transcripts

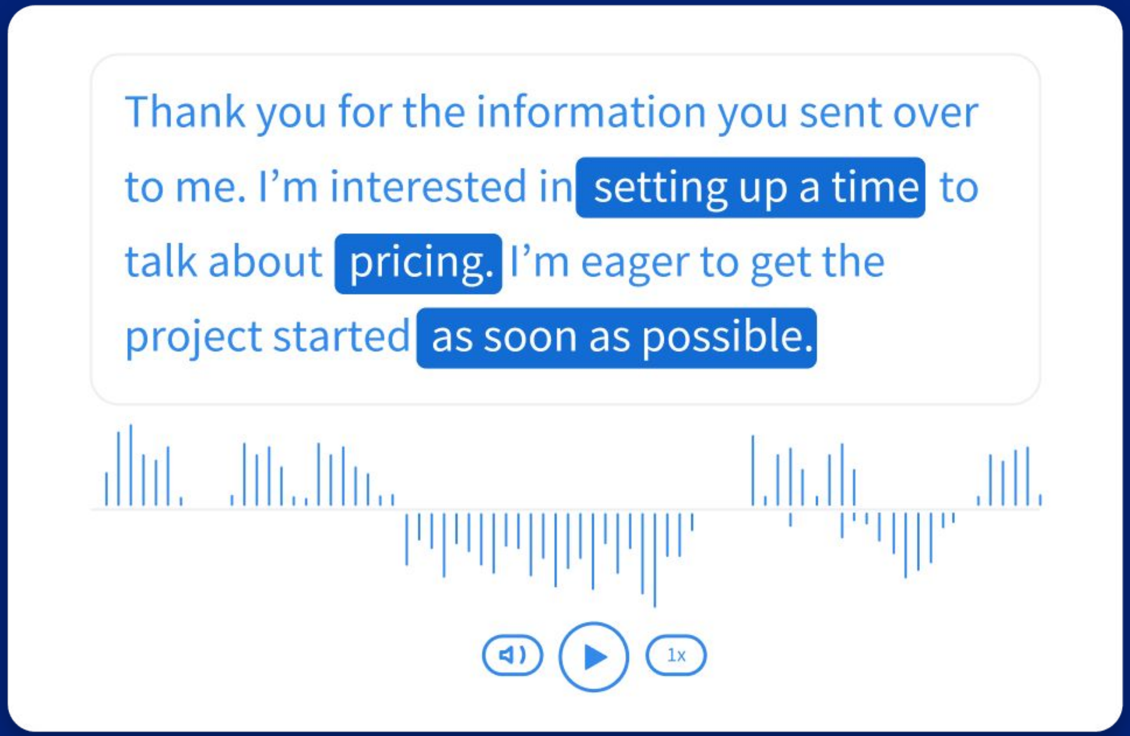
Read full conversations using Transcripts

Built on voice recognition software, our Transcripts feature relies on machine transcription technology to give you instant results that would take humans hours to uncover. By using Transcripts, you'll be able to gather the content of any call without having to spend time reviewing the call's recording. We'll automatically transcribe calls and find keywords, giving you the additional context you want about your phone call leads.

You'll now be able to search all calls from any campaign, PPC search keyword, or geographic location for the words that matter to your small business. You can measure customer satisfaction, understand the context of a call without listening to a recording, and further streamline your process of categorizing and scoring calls.

Available in the caller's timeline, you can jump to important points in the conversation by clicking on the call recording's waveform and read the entire call transcript without having to listen to the call. A preview of each call's transcription is available in the call notification email you receive. You can click the link in the email to be redirected to the caller's timeline, where you can read the full transcript of the call.

Follow these instructions to learn how to set up Transcripts.



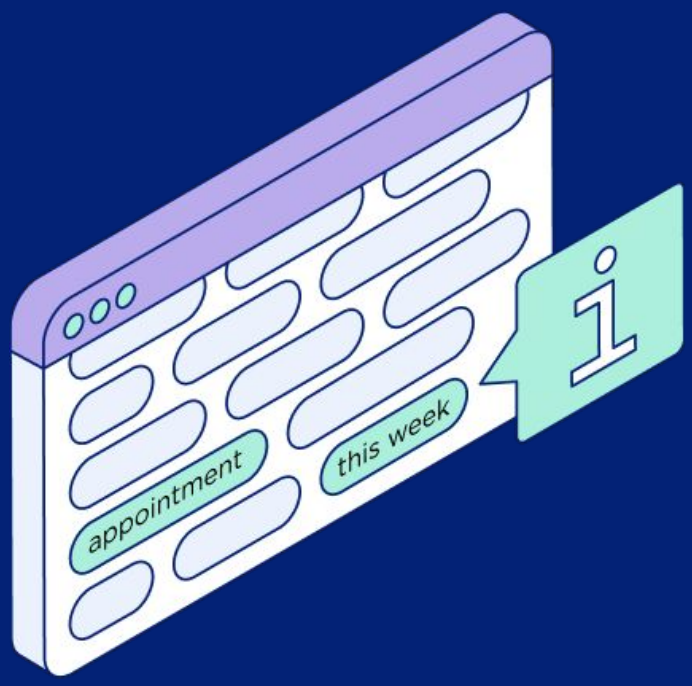
Keyword Spotting for Calls, Texts, and Forms

Use Keyword Spotting to target specific words in your calls and forms

Keyword Spotting pulls from your transcripts to instantly identify custom keywords and categorize calls for automated, detailed analysis of conversations. After the criteria and keywords associated with leads and customers are identified, Transcripts will automatically tag relevant calls.

Gain deeper insights by seamlessly integrating spotted keywords with analytics platforms. When you set up Keyword Spotting, you'll choose which words or phrases you want to target that are relevant to your small business. You can then add specific tags, score the call as a qualified or unqualified lead, and apply a value based on your own customized workflows.

Use these instructions where you'd like to activate Keyword Spotting for calls and text messages.



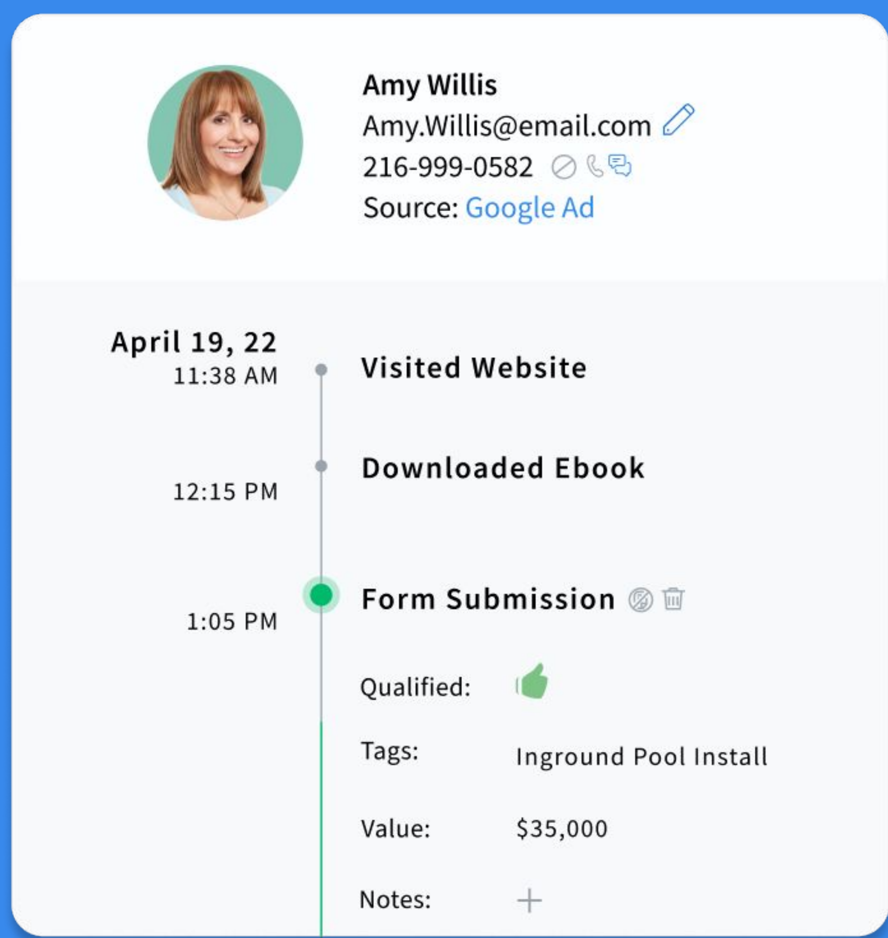
Keyword Spotting also automatically identifies specific words submitted in a form for easier organization and reporting on your leads. You can choose which words to target from your form submissions and tag, score, and apply values to those leads based on your own customized workflows. Keyword Spotting for Forms is included in all plans that include our Form Tracking product.

Use these instructions to activate Keyword Spotting for form submissions.

Call Highlights

Call Highlights are relevant words from the call transcription that are automatically spotted. Once you receive calls to tracking numbers that are using Transcripts, you can read and interact with the caller's transcript and see highlighted keywords on their timeline. Call Highlights lets you see trends and popular words from your calls to better optimize your SEO without guessing.

To learn more about Call Highlights, read these instructions.



Tags for Calls and Form Submissions

Tags are a helpful way to sort and categorize your calls and form submissions. Tags can be created, edited, and color-coded to help you sort your data faster. There's no limit to how many tags you're able to add—you can also assign multiple tags to a single call or form.

Applying colors to each of your tags lets you quickly differentiate between the types of calls and forms you receive. By default, the background color of any tag is gray, but you can choose one color for product inquiries, one for customer service, another for billing questions, and so on. Once a color has been assigned to a tag, all assigned tags will update to reflect the new color.

Follow these instructions to configure tags for a specific company within your account.

You can apply a tag to a call or form submission from several places within CallRail—read these **instructions** to learn more.

Additionally, to learn more about adding a call value, check out these **instructions.**

SECTION TWO

Viewing the data

Visitor Timeline

To learn more about an individual call, text, or form submission, you'll view their Visitor Timeline. This will show you person-level information on how a lead has interacted with your business over time. You'll see what source originally drove the lead, whether it be an online source like a web link in a social media post or an offline source like a business card. You'll also see keyword and web session data if you're taking advantage of our Keyword-Level Call Tracking.

When diving into an individual call, this is where you'll see Conversation Intelligence come to life. Below the call recording, to the right, you'll see Transcripts in action. You can quickly scroll to read the conversation and see what important keywords and phrases have been spotted in your call. To the left, you'll see where CallScore has qualified or unqualified the lead, as well as see where you can add a value, tag, or note to the phone call.

The notes can let you know you know you need to follow up with a prospect. If you're an insurance agent, for example, you can easily see who you need to call back with personalized insurance rates and coverage options.

Premium Conversation Intelligence™

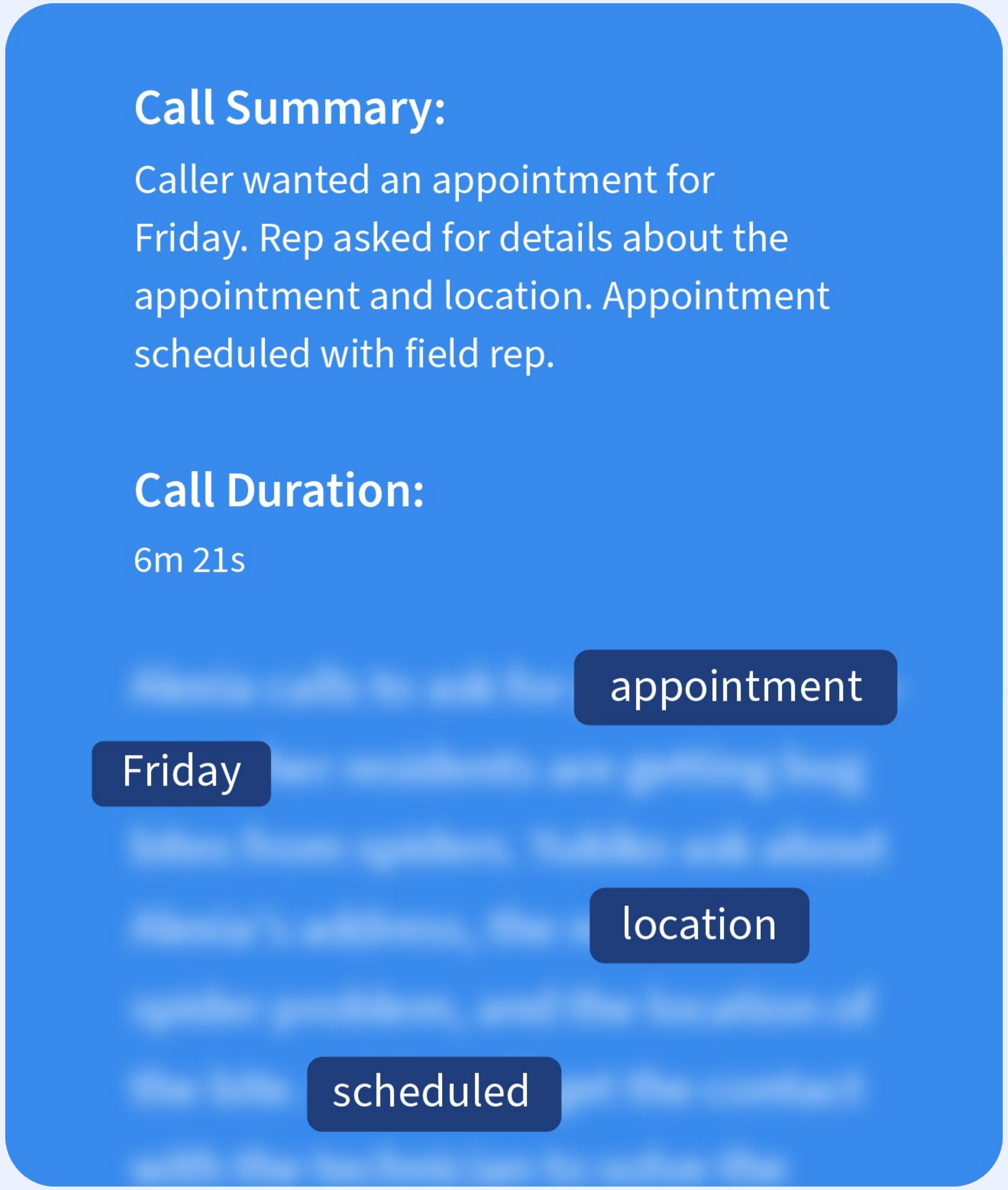
Call Summaries

Call Summaries and Call Sentiment give you a snapshot view of a call to provide the most important information, automated call qualification, and real-time customer sentiment. The Call Summary is a brief summary of call transcripts for quick review. You can filter these by campaign to see how your teams' marketing and conversations are going and how they can improve.

As a real estate business for example, you may notice that real estate buyers are beginning to ask more financing questions on a first call. Or, you may discover that there is an increased interest in smaller properties. You could then prepare your teams to have better, well-researched conversations based on those insights.

These quick views save you the trouble of manual transcript auditing and let you identify opportunities more efficiently. These features ultimately help you improve marketing performance and conversion rates. [a][b]

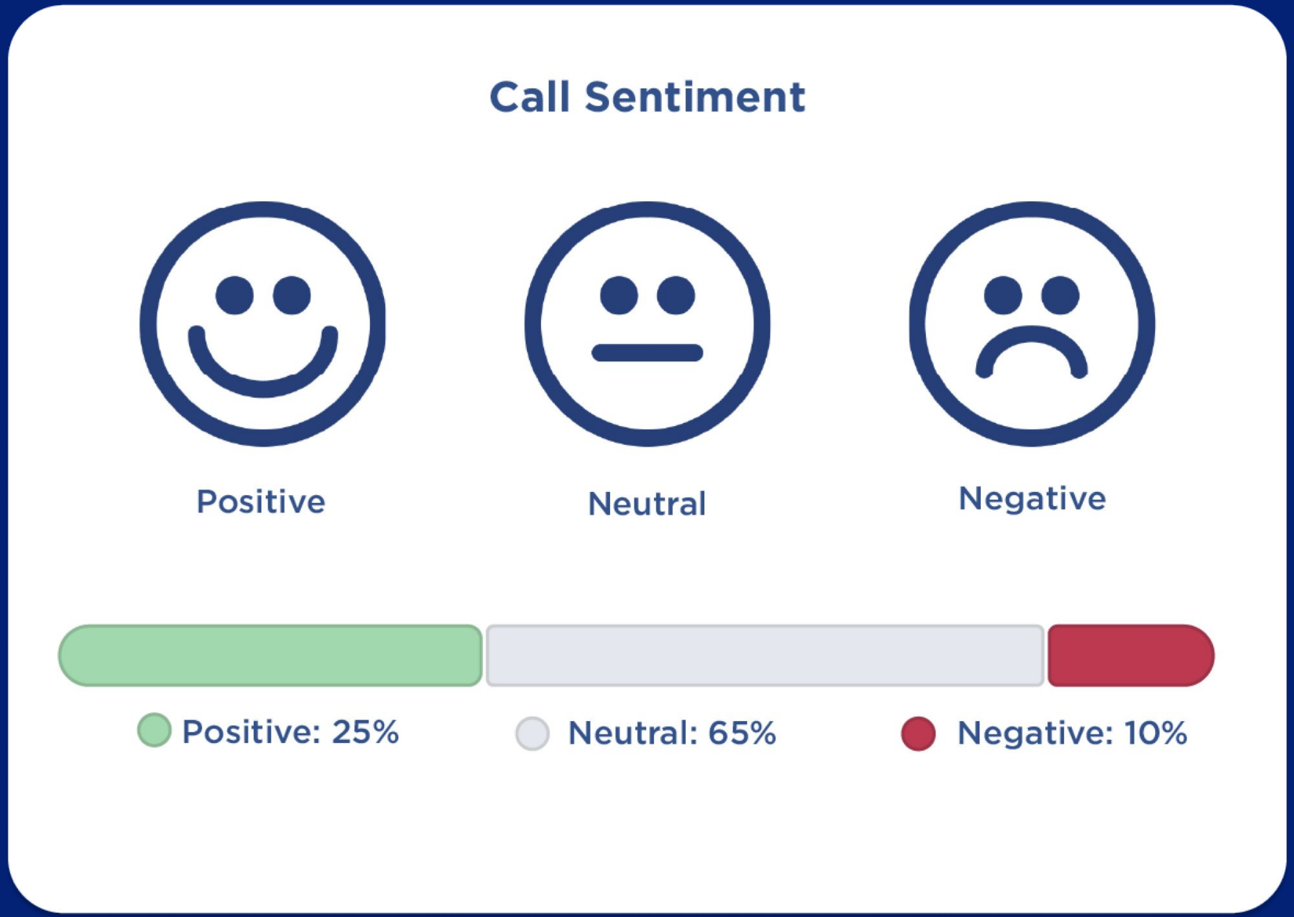
Learn all the ways to view Call Summaries by following these instructions.



★ Premium Conversation Intelligence™

Call Sentiment

Call Sentiment identifies both customer and staff sentiment in real time or retrospect. These insights help your teams improve performance because they can better handle objections and provide more informed customer service.

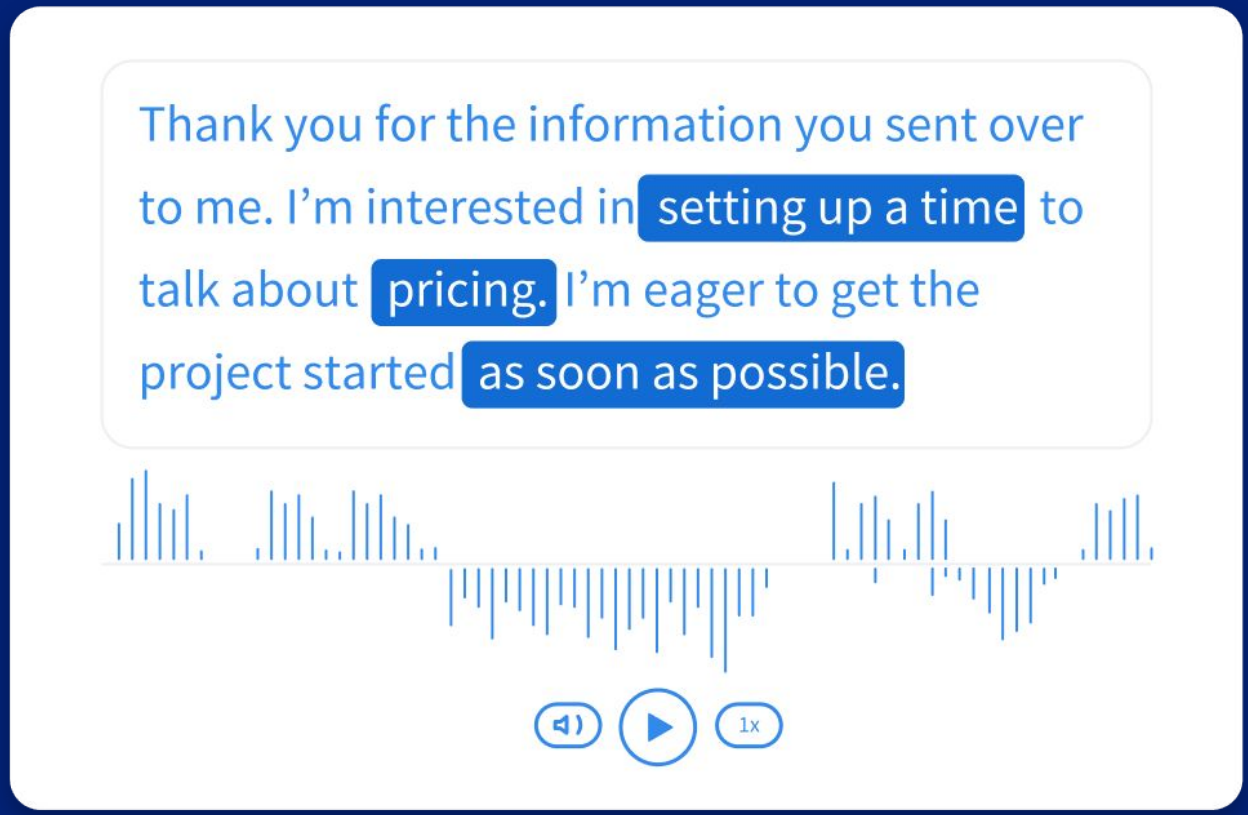


Transcripts Search

Transcripts Search is a tool for quickly searching your call transcriptions for important information. You can search your transcribed calls from the past year to find specific words, phrases, or set search terms for a deeper analysis of your calls and to quickly return a list of relevant calls from your call log.

For example, if your business is in healthcare, you can isolate all the calls in which patients mention an "urgent" need for an appointment. You can also learn which wellness concerns are trending and make advertising decisions based on that information.

You can search your call transcriptions for any terms, whether or not you've added them to one of your keyword spotting sets. Using Transcripts Search might help you discover new keyword sets to leverage or even new PPC keywords and/or ad copy for better audience targeting.



SECTION THREE

Reporting

To see higher-level information about your most common spotted keywords and call highlights, you can use our Keywords Spotted and Call Highlights reports.

Keywords Spotted Report

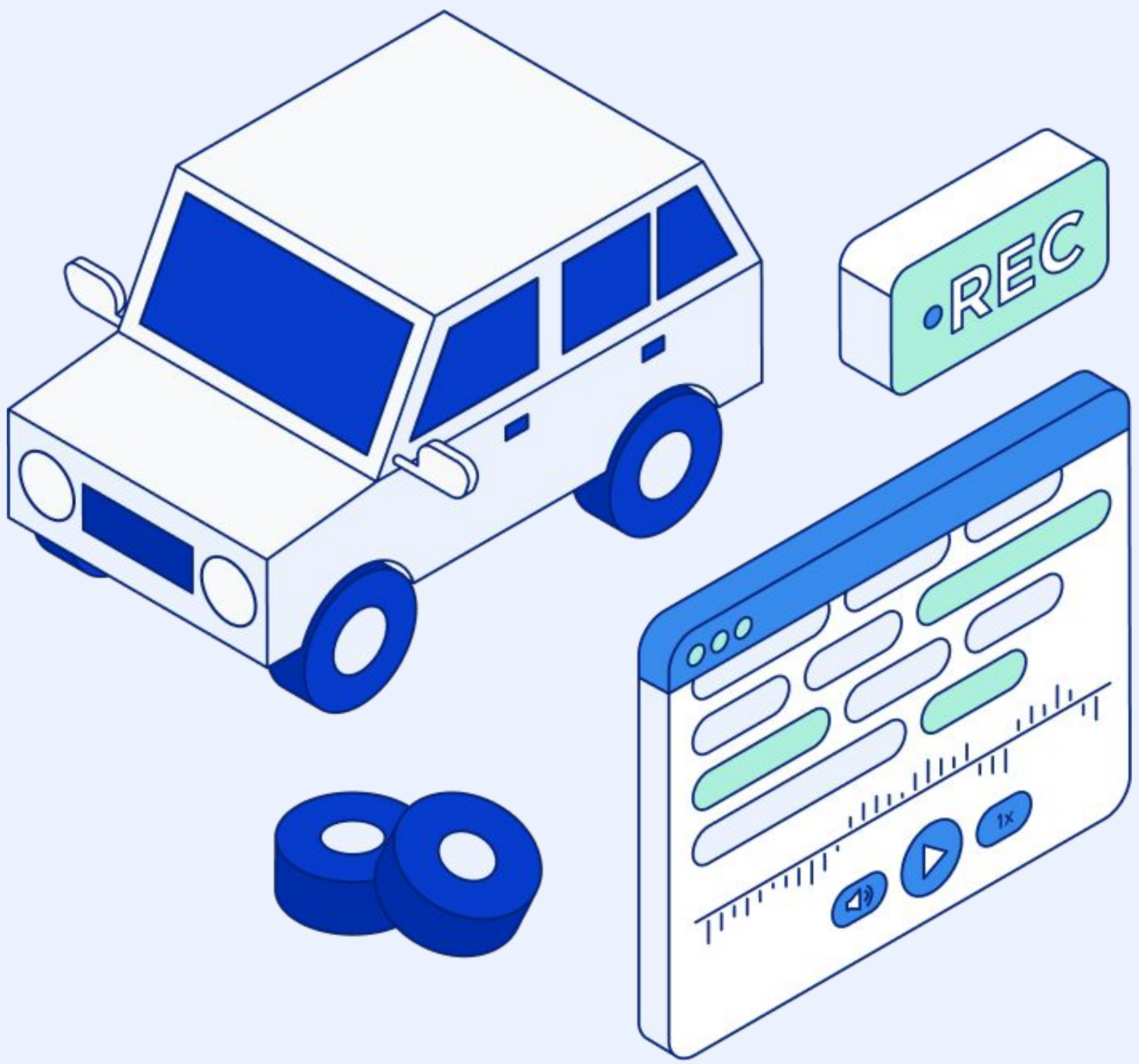
The Keywords Spotted report provides a full breakdown of the targeted keywords that are used in most calls to your business. The report also shows how many of the calls featuring your keywords were marked as qualified leads. You can use the Keywords Spotted report to see all of the calls where a specific keyword was used and to further optimize your marketing process.

A financial planning business, for example, could see that callers were frequently asking about retirement options. They could then decide to run digital marketing campaigns around their retirement planning services. Knowing what keywords customers care about can help drive new leads in their digital marketing campaigns.

Call Highlights Report

The Call Highlights report provides a full breakdown of the important keywords that are automatically spotted in calls your small business receives. The report can also display how many of the calls featuring highlighted words were marked as leads. You can use the Call Highlights report to see all of the calls where important keywords were automatically spotted and to further optimize the marketing process of your small business.

Conversation Intelligence can also highlight phrases that indicate a successful call. As a small business like an **auto dealership,** it can also help you collect Voice of the Customer data for better conversations with car buyers.



REC
1x
appointment
this week