CallRail

# Grow your home services business with Conversation Intelligence

# Conversation Intelligence® extracts valuable insights from your calls

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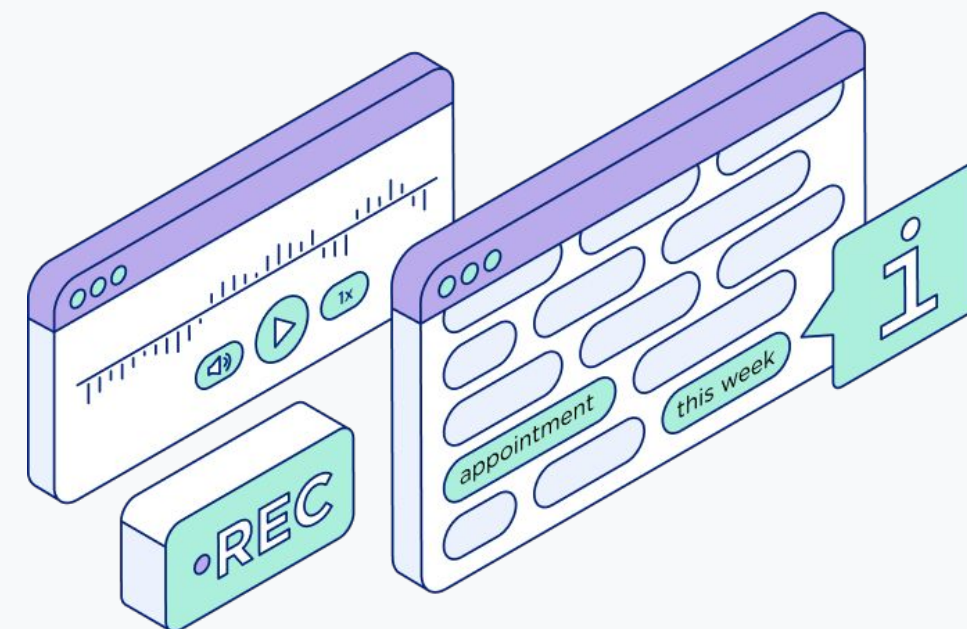
And the best news? You no longer have to spend hours tediously reviewing every call recording. Instead, with Conversation Intelligence® we automatically tell you what happens on your calls, which callers are likely to be your best customers, and which marketing channels get the best results. This allows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

# Get an automated, detailed analysis of your conversations

Our Premium Conversation Intelligence engine automatically qualifies phone leads on your behalf by transcribing, summarizing, and analyzing 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, you can easily see which customers requested urgent or immediate service.

# Spot trends and opportunities

Using your call transcripts, we'll instantly categorize and score your calls. You can prioritize which calls to return — this is critical as **93% of homeowners** obtain service within a week of starting their search. We will also identify keywords that are meaningful to your home service business and provide easy-to-view summaries in real-time to make identifying opportunities more efficient.

# 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 enables 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

However, all of our conversation intelligence technology is powered through call recordings. Before we begin, you need to ensure you have call recording turned on for all of the tracking numbers that you wish to use these features on. For more information on setting up call recording, read these underlined 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 so you can understand how your inbound calls turn into appointments, opportunities, and sales.

With this data, you can see which ad campaigns are working. Chameleon Windows Restoration and Decoration **used CallRail** to do just that. "We now collect very precise call source data," said Chameleon Marketing Manager Dmitri Povshednyy. "Consolidating it into our full marketing report helps us save resources and make better marketing decisions — faster."

With calls automatically scored, you can see the caller's score within your activity dashboard, email notifications, and call details pages. 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.
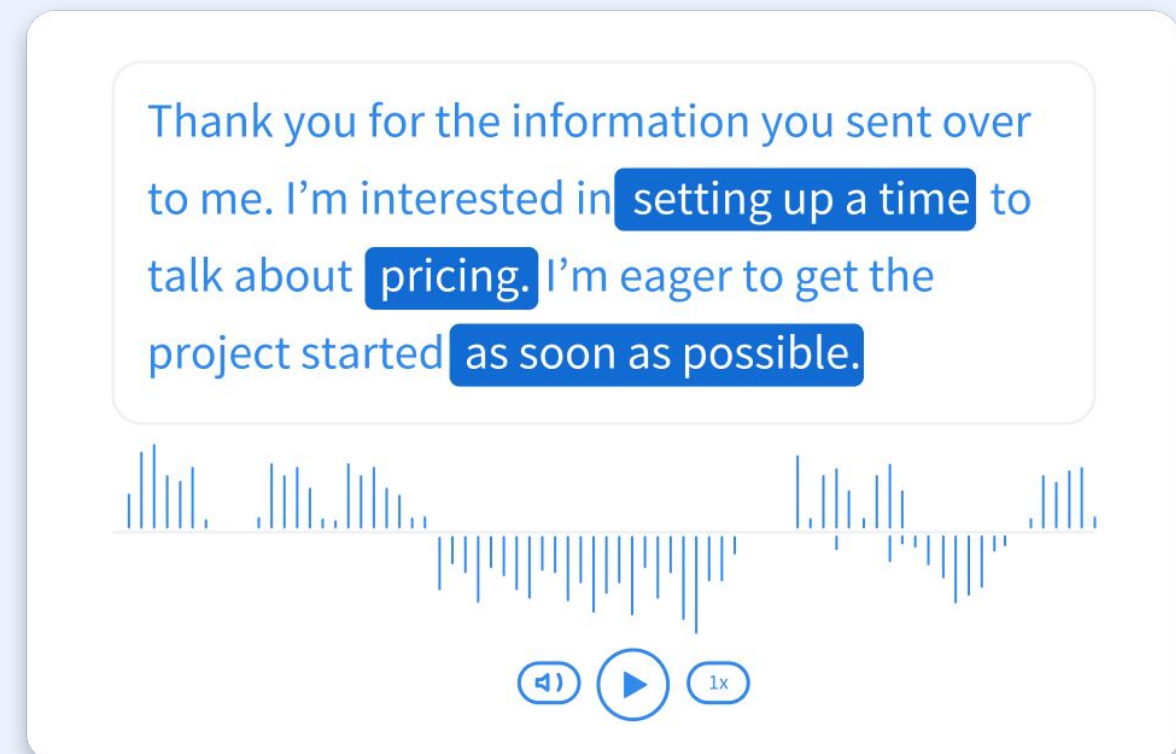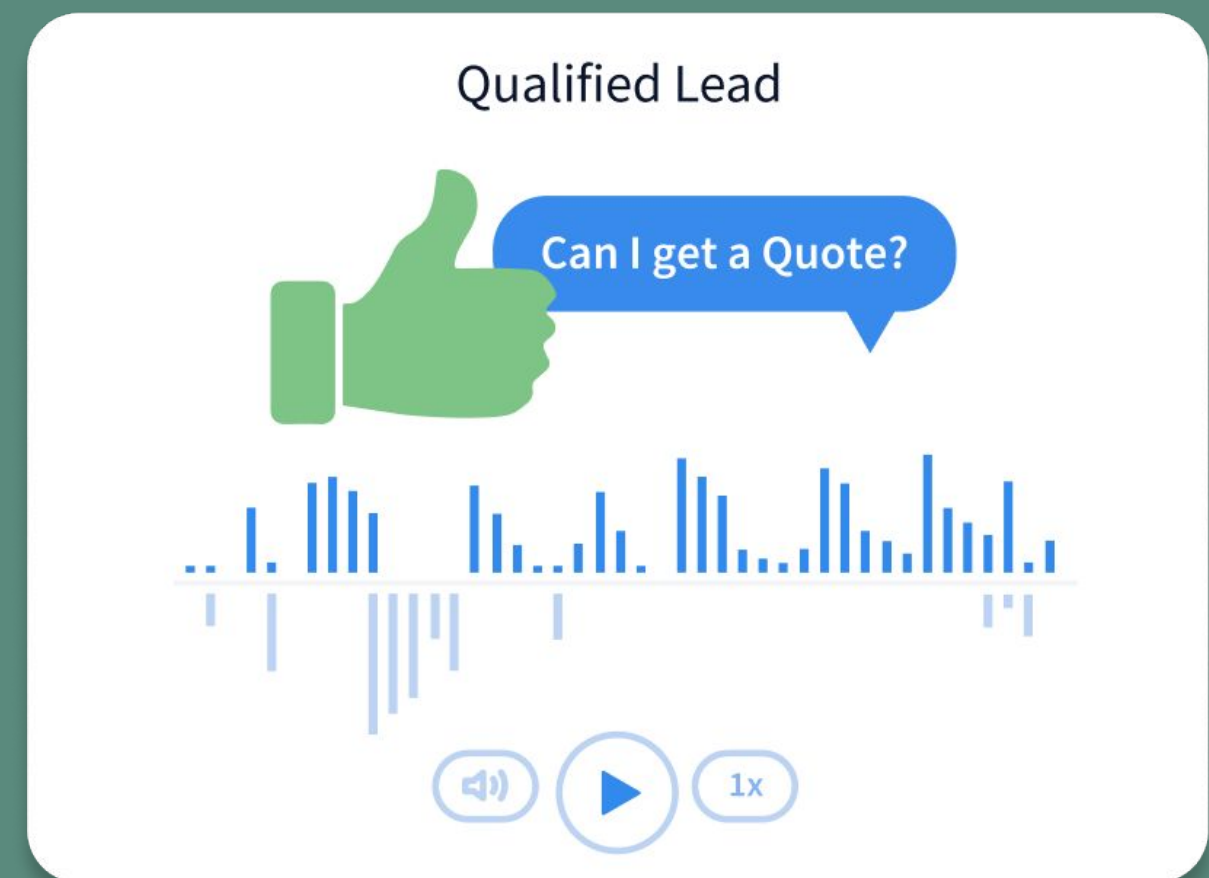
# Transcripts

## Read full conversations using Transcripts.

Built on voice recognition software, our Transcripts feature relies on machine transcription technology to give you instant results. By using Transcripts, you'll be able to gather the content of any call without having to spend time reviewing the call's recording. Operating your home services business leaves little time to monitor your calls. Transcripts does it for you.

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 home service 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 snap 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.**

Thank you for the information you sent over to me. I'm interested in setting up a time to talk about pricing. I'm eager to get the project started as soon as possible.

# 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, and 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. With little to no insight into your organic searches, Call Highlights lets you see actual data on trends and popular words from your calls to improve your SEO without guessing.

**To learn more about Call Highlights, read these instructions.**
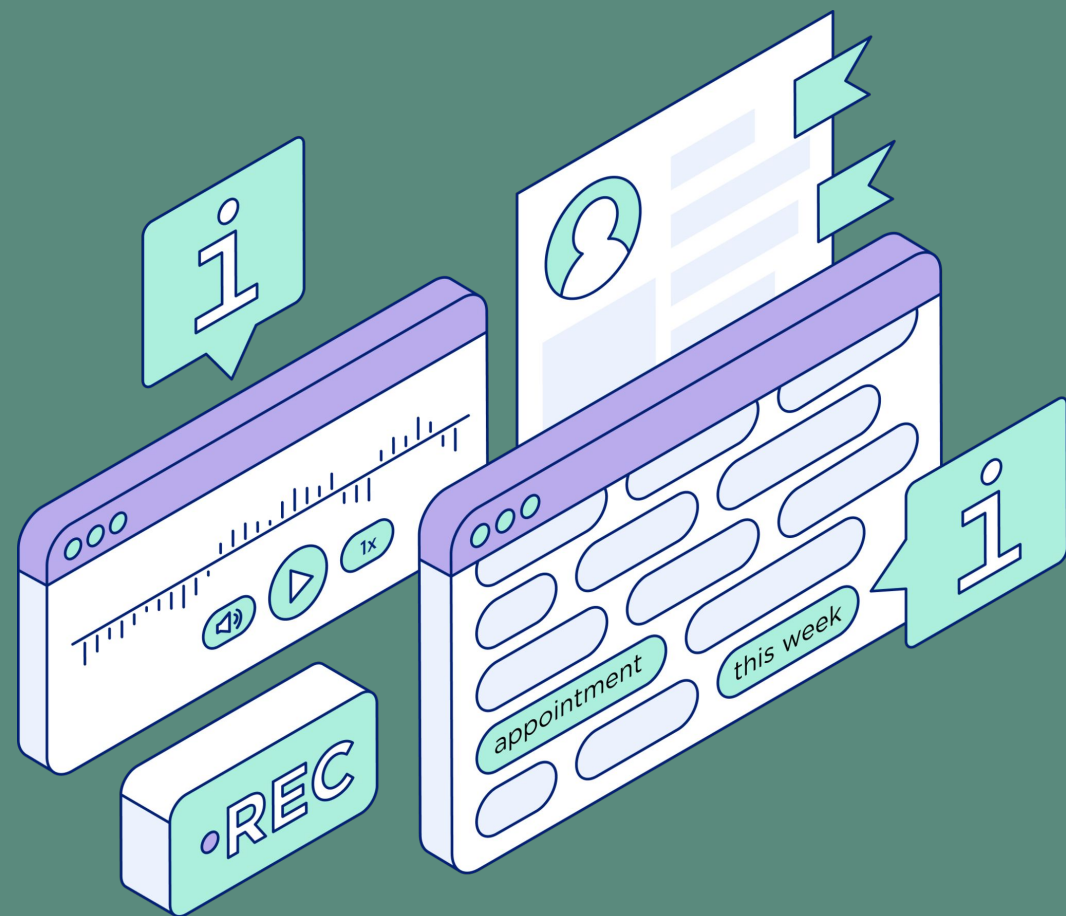
# Tags for Calls and Form Submissions

Tags are a helpful way to sort and categorize your calls and form submissions. Each company in your account has its own set of tags that 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 to a company—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 service calls, 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**.

# 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 home service 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 truck wrap. 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 and why. You can also add a value, tag, or note to the phone call in case you need to follow up on a customer question about a job quote or a specific material selection.



**Amy Willis**
Amy.Willis@email.com
216-999-0582
Source: Google Ad

**April 19, 22**
11:38 AM — Visited Website

12:15 PM — Downloaded Ebook

1:05 PM — Form Submission

Qualified: 👍

Tags: Inground Pool Install

Value: $35,000

Notes: +

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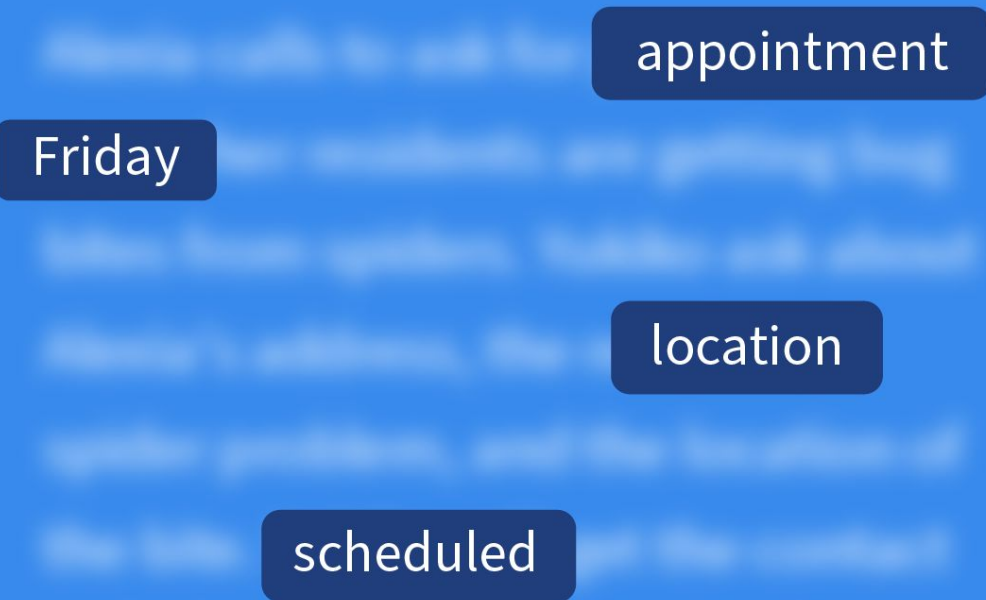
Learn all the ways to view Call Summaries by following these **instructions.**

**Call Summary:**

Caller wanted an appointment for Friday. Rep asked for details about the appointment and location. Appointment scheduled with field rep.

**Call Duration:**

6m 21s

appointment

Friday

location

scheduled

# 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.

You may, for example, discover that customers are calling to cancel pest control appointments because they believe the problem is gone after a single treatment. You could then decide to explain the importance of preventative treatments in initial customer conversations.

**Call Sentiment**

Positive          Neutral          Negative

● Positive: 25%          ● Neutral: 65%          ● Negative: 10%
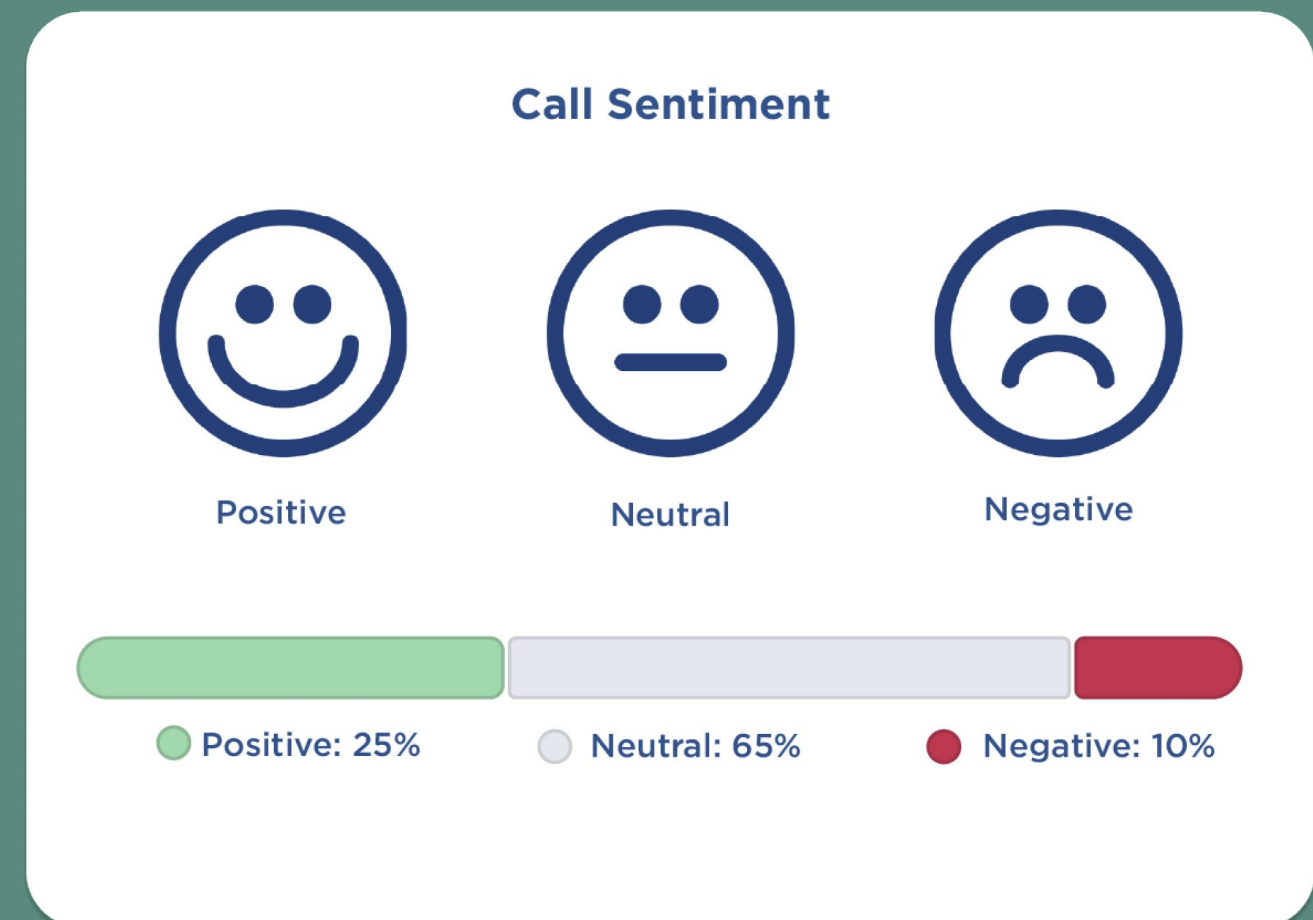
# Transcripts Search

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, you can isolate all the calls in which customers mentioned "remodeling." Then you can see which specific projects are trending and make advertising decisions based on that information.

Please note: Transcripts and call recording must be activated in your account before you can use Transcripts Search. Use these **instructions** to access Transcripts Search in your account. 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.

Call Highlights:

air conditioning   this week   Lennox

Call Duration: 1m 28s

air conditioning

✓ Qualified Lead

this week.

Lennox

# 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 home service 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.

For **Reliable Heating and Air**, knowing what keywords customers cared about helped drive new leads in their digital marketing campaigns. They tested keywords around "leasing equipment" and discovered that finding relevant but less competitive keywords increased opportunity and ROI.

Keyword Spotting must be activated in your account before you can access the Keywords Spotted report. Follow these **instructions** to access your Keywords Spotted report for a specific company.

# Call Highlights Report

The Call Highlights report provides a full breakdown of the important keywords that are automatically spotted in calls your 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 home service business.

Transcripts must be activated in your account before you can see your Call Highlights or access the Call Highlights report. Use these **instructions** to access your Call Highlights report for a specific company.

Try CallRail's
Premium Conversation
Intelligence today.

Start a free trial