INVOCA

The Call Tracking Study Guide

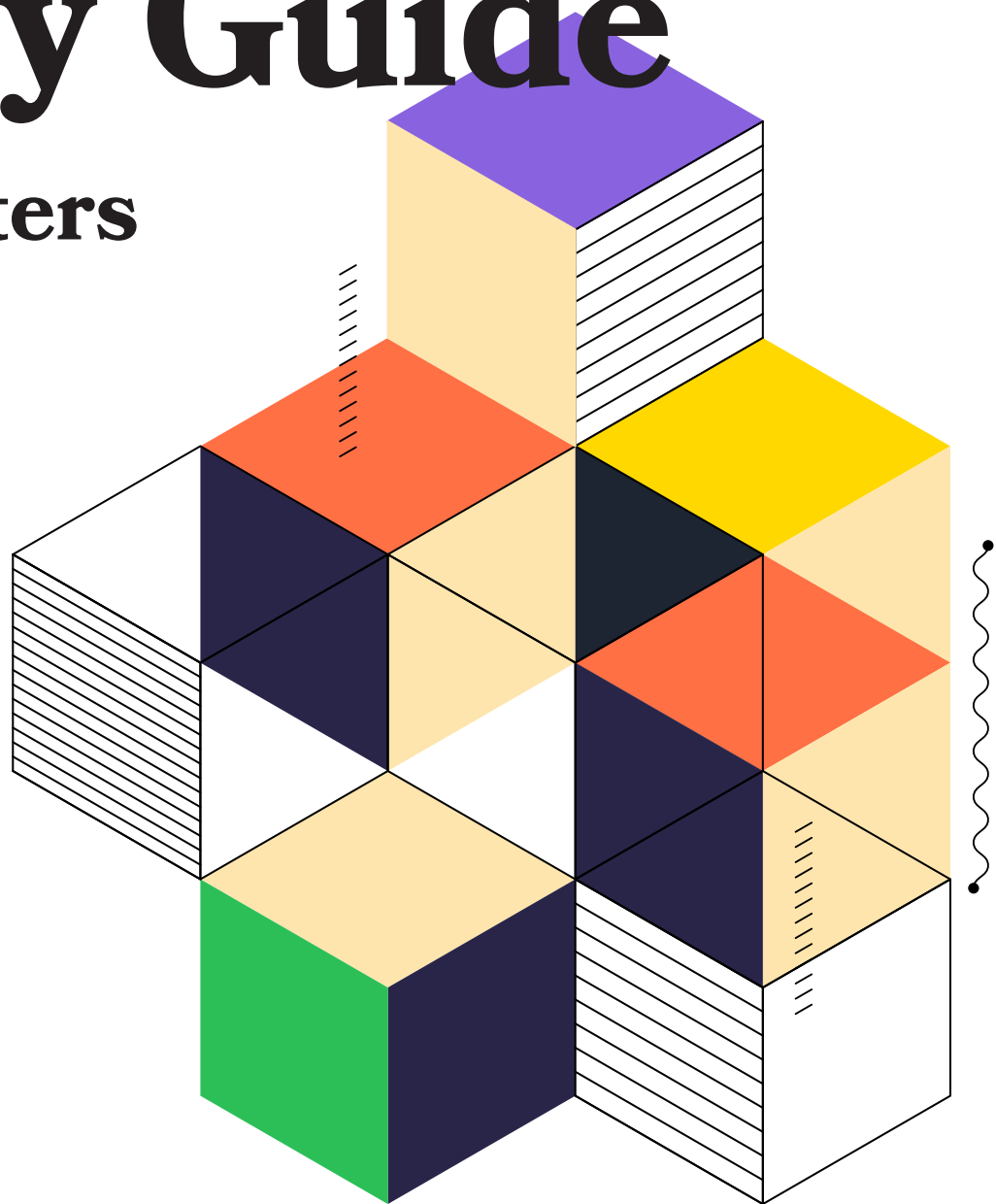## for Marketers

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101 Study Guide:

Intro to Call Tracking & Analytics

In this section we will introduce you to the guiding concepts of call tracking. You'll learn about how it works, how marketers use it, and how call tracking platforms have evolved over the years. After completing this section, you should be prepared to understand more advanced call tracking concepts and features.
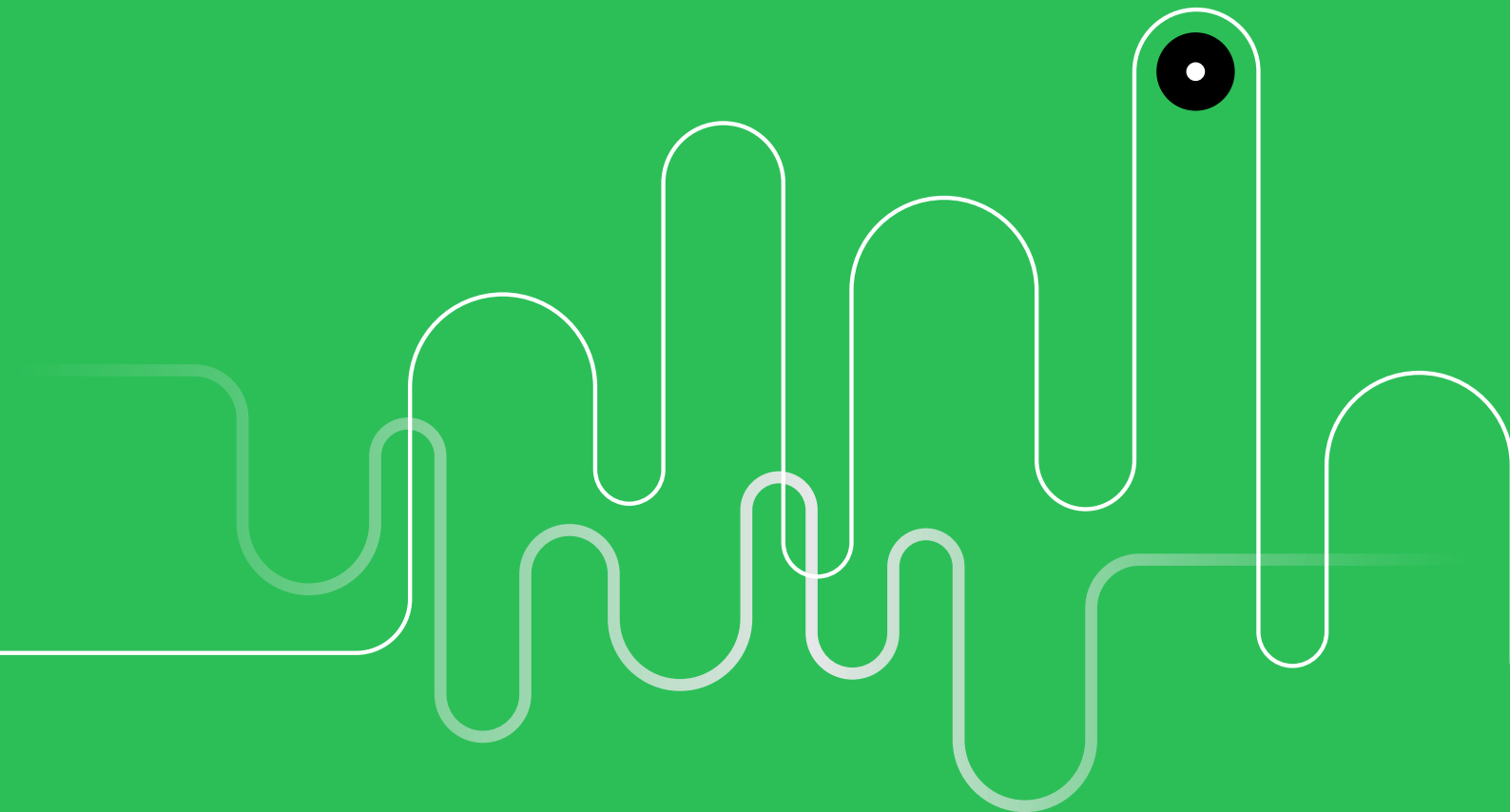
Introduction: Technology Takes Marketing from Gut-Guided to Data-Driven

Thanks to Mad Men, marketers will forever be known as a purely creative crowd that comes up with amazing ideas all day long and just keeps throwing things at the wall to see what sticks. Yelling out taglines and drinking whiskey until we're blue in the face, we come up with big winners that are remembered forever and giant flops that are ground into the carpet like so many offending cigarettes. While the five-martini lunches and chain-smoking went by the wayside a long time ago, the creative guessing aspect of marketing— or at least that perception—has far outlasted the musty nicotine stains on the hallowed walls of our institution.

In the last decade or so, martech analytics and automation tools came into the cloud and sweet, sweet data came raining down. Engagement numbers, attribution, CPC, CPM conversion rates, and SEO were to wash the scourge of guessing from marketing.

By and large, this has been more truth that optimistic fiction. We can see if emails get opened, when ads get clicked, what keywords work and which efforts are a waste. Every stop on the buyer journey is now visible and attributable.

When money is spent we know it was well spent and the old "half the money I spend on advertising is wasted; the trouble is, I don't know which half" adage no longer rings true. Well, until recently there was one exception — the phone call.

Why Marketers Need Call Tracking and Analytics

Businesses that rely on phone calls to drive revenue don't just hope that calls happen — most use digital marketing to get the phones ringing. But marketers are often left guessing whether or not their online campaigns are driving "offline" phone conversations.
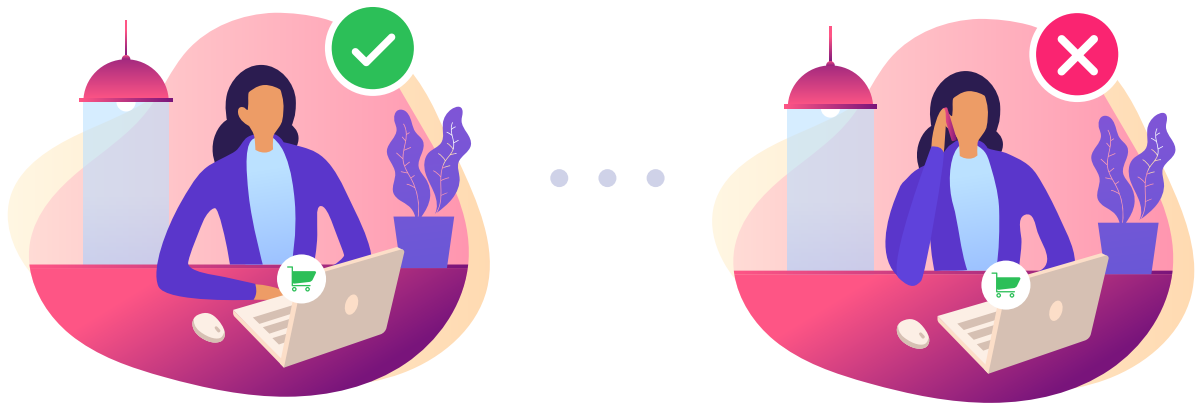
"It wasn't smart. There was no dashboard. Just a big old nasty spreadsheet we had to manually fill and filter to attribute calls to campaigns — it was mess."

**Sam Schwendiman,
Marketing Operations
Manager, CHG Healthcare**

While you have access to end-to-end customer journey data and attribution from purely digital campaigns, the data trail goes cold when your customer picks up the phone. There are some hacky approaches to correlate phone calls to digital marketing. Some use data created by the call center that is transferred to CRMs, others rely on spreadsheets and campaigns tied to hundreds or thousands of unique phone numbers. But all that gets you is correlation, which does not equal causation, or in your case, attribution.

It's like the "half-the-budget wasted" dark ages all over again, where marketers are left relying on gut feelings and educated assumptions. But put the whiskey back in your desk drawer for a second, because it doesn't have to be this way.

Call tracking and analytics platforms, which were once the domain of the call center and siloed from marketing, are now available to help marketers attribute digital marketing spend to conversions that happen on the phone. It's a data gap that you don't have to live with.

This will be on the test! Without attribution, I don't get credit for the calls and sales I drive, and can't prove the money I spend makes money.

How Invoca Call Tracking and Analytics Works

Like a lot of marketing technology, call tracking and analytics can seem like magical witchcraft, but it's not hocus-pocus and it's actually simpler than it seems. It may be tempting to skip this section and get to the part that makes your bonus bigger, but having an understanding of how the technology works will help you better utilize it.

What is Call Tracking, Anyway?

When you first say "call tracking" out loud, people often think about whatever it is that the NSA is doing, or the kind of call tracking that customer service call centers use to record calls and track call quality. The kind of call tracking that marketers use is different. The call tracking that you care about basically allows you to connect phone calls to advertising so you know what ad drove what call and what the results of that call were—AKA attribution.

For example, if you call a business that is using Invoca, they can tell what ads, web pages, or keywords helped drive you to call. And once you are on the phone, Invoca can analyze language used in the call to tell if you bought anything, got a quote, made an appointment — or what we like to call a "conversion." With this data, marketers can make their ads, web pages, social ads, and other advertising mediums better to make more people who are most likely to buy call their business.
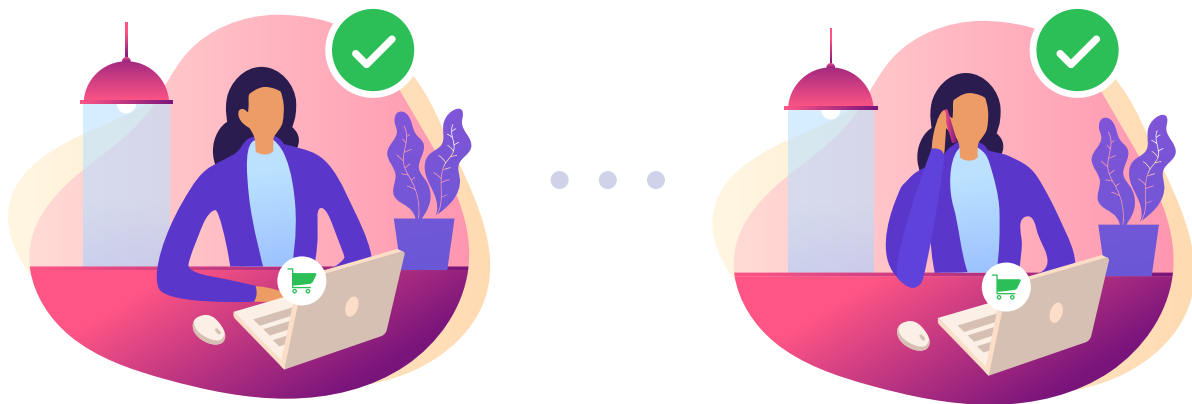
How Does Call Tracking Work?

Getting marketing attribution for sales that happen on the phone is cool, but how does Invoca make it happen? To make this simple, let's take a look at it in action.

Exercise

1. Get out your phone or laptop and have a friend grab theirs too

2. Go to invoca.com on both devices

3. Note the phone number in the upper right on both devices
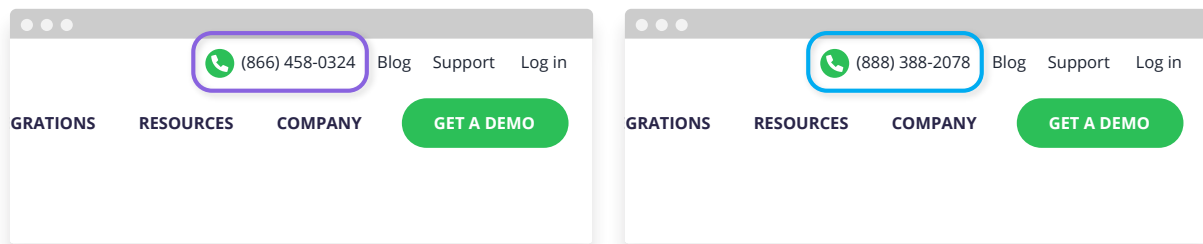
OK, that's actually pretty cool!

You probably noticed that there is a different number on your device and your friends. If you call this number it goes to the exact same place. But the reason you are both seeing different numbers is that Invoca places dynamic numbers on the page that are attached to your browser's cookies, and that is how it is able to track and attribute your actions. Watch this short video(Fig 1) to see how it works.

Bringing Data Together

Invoca enables marketers to tie consumers' digital journey data to phone calls using online data collection and those trackable phone numbers. But all this data does not do a lot of good unless you can see it all in one place. Check out this quick video(Fig 2) to see how data is unified in the Invoca platform allowing you to analyze digital and call data in one place.

Peep these videos @: invoca.com/product/tour/

Fig. 1
Invoca places dynamic numbers on the page that are attached to your browser's cookies, and that is how it is able to track and attribute your actions.
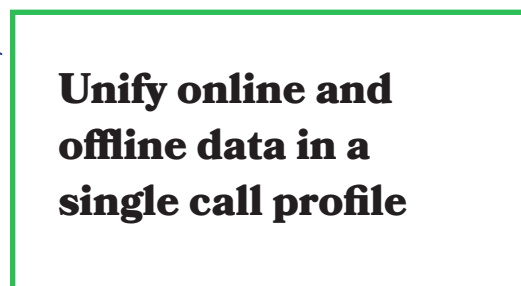
Fig. 2
See how data is unified in the Invoca platform allowing you to analyze digital and call data in one place.

The Evolution of Inbound Call Tracking & Analytics

Back in they day, call tracking solutions were primarily used to monitor call quality, customer service, call volume, and basic customer information. As digital marketers who spend their time and budgets driving phone calls began clamoring for call data, new technologies have been developed to pull that data out of the call center silo.

As call tracking for marketing has evolved, some platforms have evolved to match the sophistication of today's digital marketers, while others strive to meet the needs of small or local business, and still others have simply become basic, low-buck solutions.

On that, you should be aware of the differences between the available offerings.

Basic vs. Advanced Call Tracking Solutions

Basic call tracking solutions can provide marketers with valuable call data like call volume, call times and duration, caller information, and some level of campaign attribution. However, basic call tracking solutions have some major limitations for marketers who want to use call data to inform their marketing efforts.

Basic call tracking:

- Ignores the larger customer journey, may provide last-touch attribution
- Does not provide context about the nature of the call, such as call drivers, and outcomes
- Cannot provide rich caller profiles, e.g. existing customers vs new customers and demographics
- Lacks deep integrations with other marketing platforms

If it can't push data to our analytics platform, we can't use it!

- Cannot provide adequate data to automate next-step marketing processes like retargeting and suppression

Imagine a website analytics solution counted pageviews, but couldn't track referrals, report bounce rates, failed to provide any consumer data, couldn't fire custom events, and didn't integrate with any other systems. That's how you should look at legacy call tracking: valuable to a degree, but only able to deliver the most basic analytics.

How AI-Powered Call Tracking and Analytics Bridges the Online-Offline Data Gap

Today's more advanced call tracking platforms pick up where the old ones leave off by unearthing rich data about the call, attributing the call to the entire digital journey, and providing the data required to automate marketing actions after the call, like retargeting and suppression.

Platforms like Invoca provide the following capabilities:

1. **Track** calls and attribute them to pre-call consumer touchpoints like paid search, social, display, emails, or landing pages

2. **Unify** data across multiple sources including web, CRM, or other offline data to create a rich caller profile

3. **Analyze** phone conversations with tools like Invoca Signal AI to derive insight around call drivers, behaviors, and outcomes

4. **Push** this intelligence to your marketing stack for automation, analysis, optimization, personalization, and audience expansion

Think of this like the kind of data and flexibility that you get from online analytics and marketing automation tools like GA.

This'll be on the test! Calls can be attrib. to search, social, display ads, emails, landing pages.

What Marketers Can Do With It

Armed with powerful call data, digital marketers can optimize marketing performance, personalize the caller experience, enhance the end-to-end customer journey, and expand audience reach. Optimization, personalization, customer journey enhancement, and audience expansion will be covered in section 301.

Section 101 Checkup

Let's see what you learned!

Question 1: Why does attribution for phone calls matter?

Question 2 : Calls can be attributed to display ads.

⭘ True   ⭘ False

Question 3 : Invoca can tell you about call outcomes.

⭘ True   ⭘ False

Question 4: Call tracking can help you:

☐ Expand audiences   ☐ Personalize call experience

☐ Optimize ads   ☐ All of the above

Question 5: Basic call tracking can trigger ad retargeting

⭘ True   ⭘ False

Section 101 Checkup Answers

Question 1: Why does attribution for phone calls matter?

Attribution allows you to get credit for the calls and sales you drive, and prove the effectiveness of marketing spend.

Question 2 : Calls can be attributed to display ads.

True

Question 3 : Invoca can tell you about call outcomes.

True

Question 4: Call tracking can help you:

All of the above

Question 5: Basic call tracking can trigger ad retargeting

False

201 Study Guide:

Advanced Call Tracking Concepts

In this section you will learn about the basics of machine learning (ML) and artificial intelligence (AI). You will also find out how ML and AI are used to analyze calls to predict consumer behaviors, attribute conversions that happen on the phone to ad campaigns, and provide a new source of 1st-party data to marketers.
We'll also take a look at how Invoca Signal AI works, how its implemented and how it works with the rest of your martech stack.
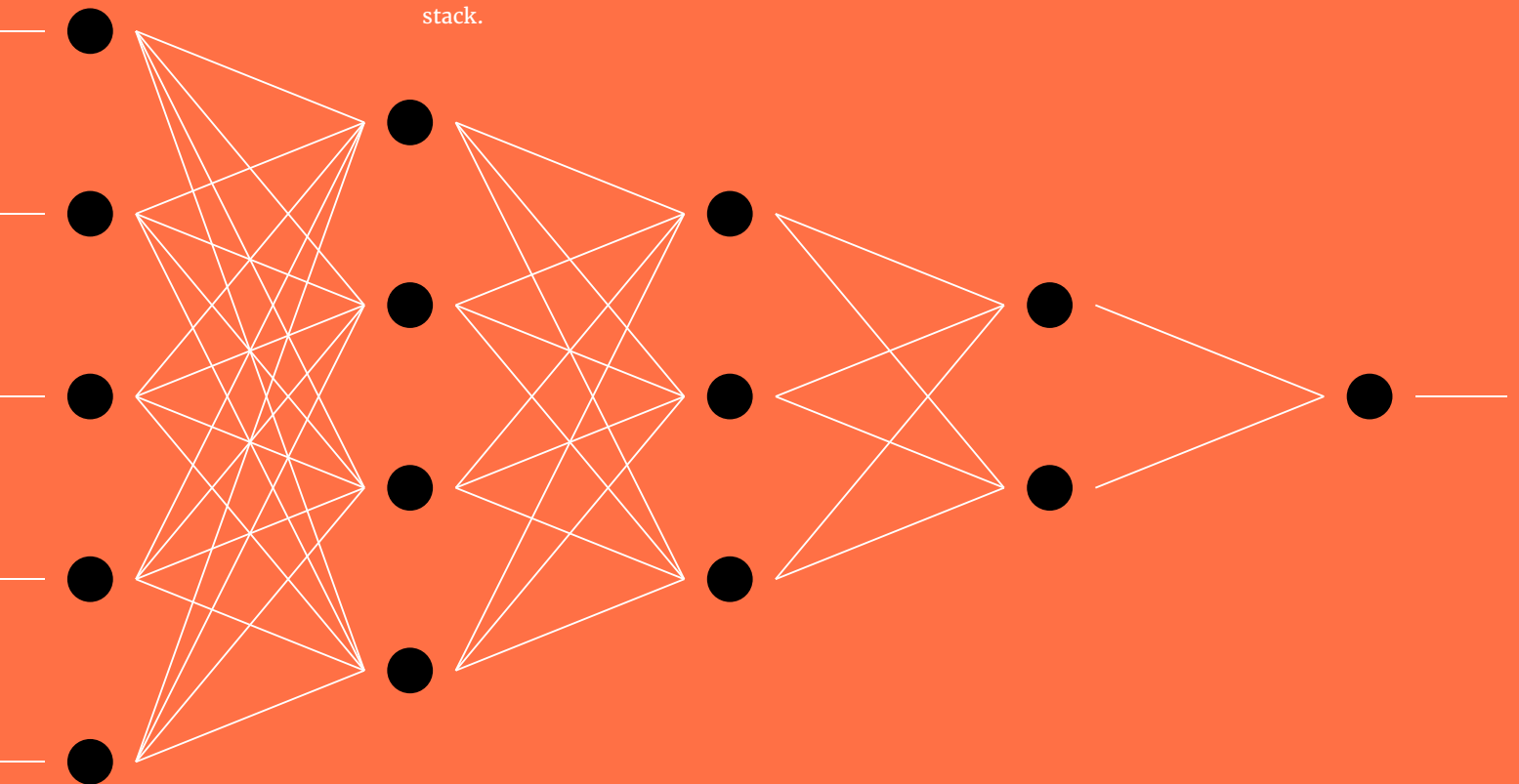
Analyzing Calls with Artificial Intelligence

Artificial intelligence–powered platforms are helping marketers make more precise data-driven decisions faster than ever. Many martech companies are launching AI applications, and it's exciting to see the technology become pervasive across so many industries so quickly. Just for context, here's what the landscape is looking like in 2019:

Image: TOPBOTS

Invoca Signal AI is designed to allow you to better understand and predict consumer behaviors by mining data from phone conversations with your customers. Signal AI has been used to analyze over 4 million conversations to uncover new opportunities to boost marketing ROI. That's all great, but you're probably interested in how it actually works. Let's get beyond the AI buzzwords and dig into the 1s and 0s.

What is Machine Learning and Artificial Intelligence?

"Artificial intelligence" (AI) and "machine learning" (ML) are frequently used interchangeably, but they aren't the same thing. Just to clear the air (and make you sound smarter when you talk about it):

AI is the concept of machines carrying out tasks, ML is an application of AI that gives machines data and lets them learn.

AI is the broader concept of machines being able to carry out tasks in a way that we would consider "smart".

ML is a current application of AI based around the idea that we should be able to give machines access to data and let them learn for themselves.
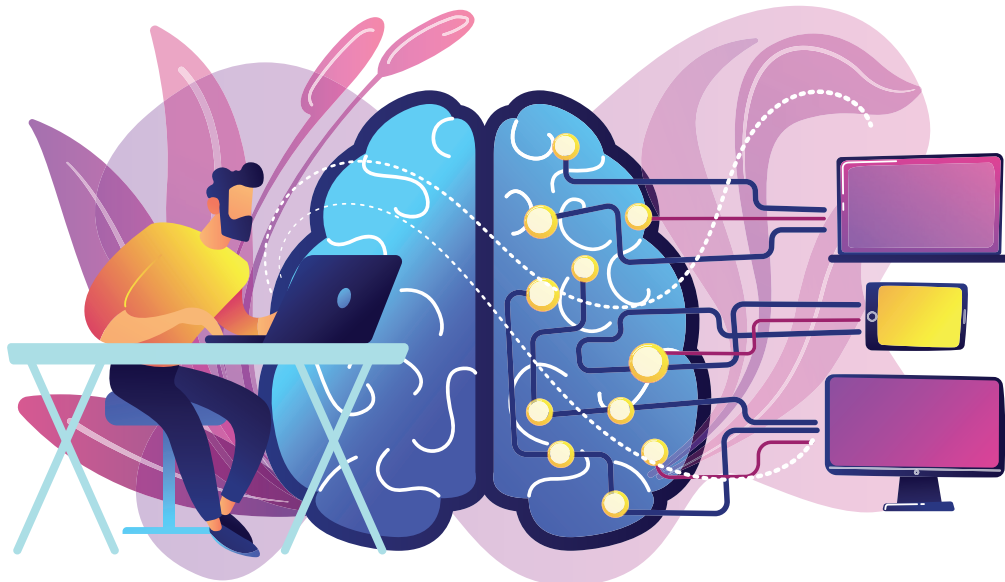
However, ML and AI are not magic wands. As nice as it would be, marketers can't just flip an AI switch and double marketing ROI. Like all marketing tools, they are most valuable when they are powered by a clear strategy and clean data.

Using AI to Extract Value from First-Party Call Data

Phone conversations may be your ultimate first-party data source and they're a holy grail for marketers who work in industries that rely on phone calls to make sales. But marketers aren't usually equipped to handle the sheer volume of data created by phone calls. Just imagine listening to thousands of phone calls a month to figure out when conversions happen, when they don't, and trying to apply what you discovered to take the next appropriate digital marketing step for each individual caller. Some organizations have actually tried this, and it's costly, error-prone, and inefficient to perform at scale.

Wow, who has time to listen to that many calls?

So when it comes to calls, you enter the modern conundrum of having too much data — in this case, call recordings — and no way to efficiently analyze or use it. Enter Signal AI. It can take in vast data sets and draw conclusions by detecting intent and word/phrase patterns, then give marketers access to valuable, actionable insights that would be otherwise unattainable. On top of that, Signal AI is able to detect subtleties that humans might miss, as machines can identify patterns that people could easily gloss over.

Signal AI makes data from phone conversations accessable and actionable.

Too many calls!!!

How does Invoca Signal AI work?

How does it all work? We'll break it down into a four basic steps:

Step 1: Call data flows into the Invoca platform during each conversation.

Step 2: The spoken data is transcribed* into text so it can be analyzed by the algorithm.

Step 3: The predictive model analyzes the conversation and identifies key patterns, phrases, and actions, then identifies call outcomes such as 'application submitted' or 'quote received'.

Step 4: Those outcomes and insights are pushed into your marketing stack so you can use this valuable conversation data to optimize marketing spend and personalize the customer's next interaction — all in real time.

Transcripts aren't saved anywhere and call recordings are automatically redacted. WOOT data privacy!

| Step 1 | Step 2 | Step 3 | Step 4 |

Unified caller data

Audio

CALLER
SSN: ###

AGENT

PCI & PII

AI PREDICTIVE MODELS

FEATURES

ATTRIBUTES

Appointment ✕ ✓ Sale
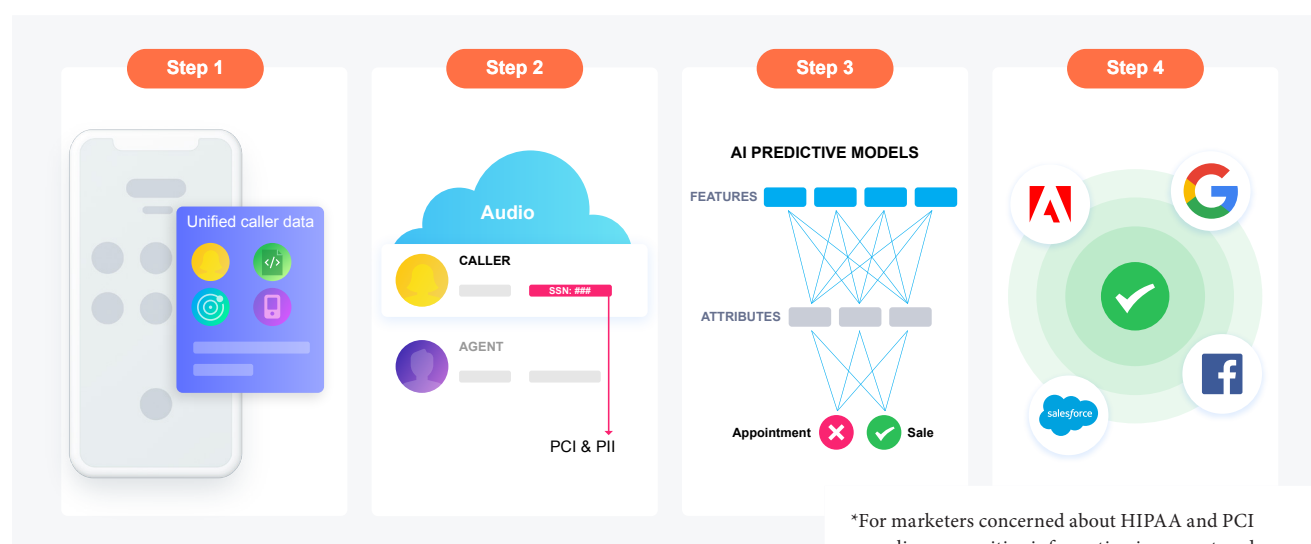
*For marketers concerned about HIPAA and PCI compliance, sensitive information is never stored anywhere and Invoca automatically detects and redacts it from all data, analytics, and reporting — even in cases where calls are recorded.

There are many ways that marketers can put this data to work, here are a few typical applications:

These will probably be on the test!

- **Optimize Ad Spend:** Automatically adjust keyword bidding strategies and suppress ads in systems like Google Ads and Search Ads 360 for callers who convert over the phone

- **Seed Audiences:** Create new audiences using offline conversion data to expand your reach through native integrations with Facebook and Adobe Experience Cloud

- **Personalize Content:** Update content management tools like Adobe Target to personalize content for each subsequent consumer visit based on call conversations

Exercise:

Use Invoca Data to Optimize an Ad

Having access to complete keyword attribution data, including conversions, can help you optimize ads and keyword spend to get more high-intent callers on the phone. Based only on call volume, which keyword would you choose?
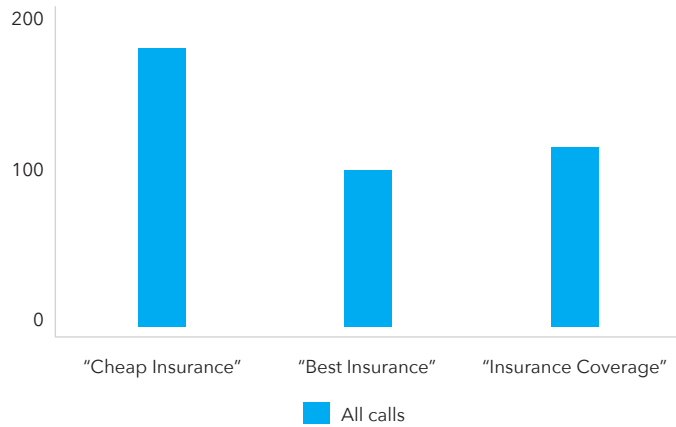
Now, taking into account call volume, call duration, and conversions, which keyword would you choose?
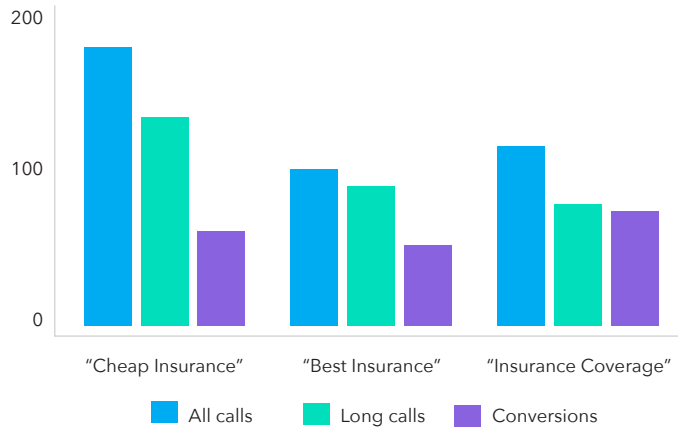
As you can see, incomplete attribution data can lead you astray. Only knowing that "cheap insurance" drove the most calls, you would put your money there even though "insurance coverage" actually has a far better conversion rate.

How Signal AI is Implemented

While Signal AI is quite advanced functionally, it does not require a heavy IT lift to implement, and "training" it to identify outcomes for your business can be accomplished fairly quickly. We offer two different versions of Signal AI that can be selected depending on your resource availability and complexity of your use case.

Pre-trained AI

We have built "out-of-the-box", industry-based predictive models that have been pre-trained using tens of thousands of hours of industry call data. Our industry pre-trained signals are applicable to considered purchase-focused businesses in industries like insurance, automotive, financial services, telecommunications, home services, and healthcare. Not all companies want to identify the same insights from their conversations, so we created over 25 distinct pre-trained signals for marketers to choose from. This package is also ideal for marketers that may have an insufficient volume of call recordings to train a custom algorithm.
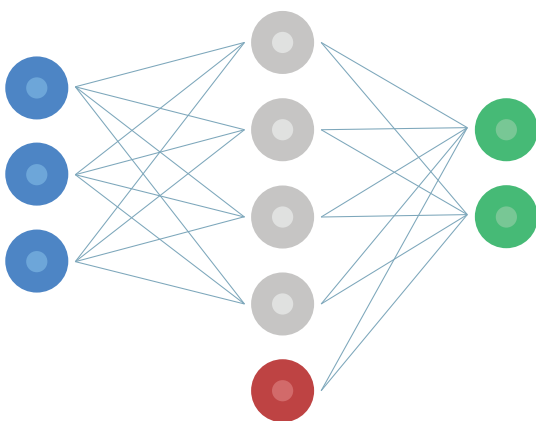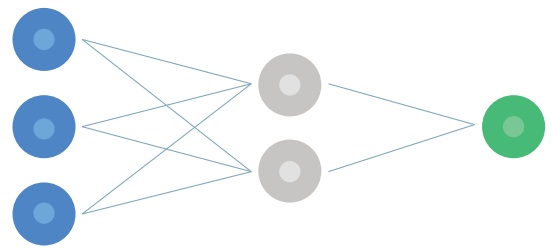
Custom AI

Business that have unique business outcomes, high volumes of existing quality call data or, a more sophisticated data science or analytics function at their organization are more likely to use Custom AI. To implement Custom AI, you first identify the outcomes you care most about and then compile a set of calls where that outcome is met, and another set of calls where that condition is not met. For example, if you want to identify calls where a caller submits an application, you'll compile sets of calls where an application was submitted and where an application was not submitted, so that the AI model can learn how to distinguish between when specific events happen vs. when they do not. The data is then uploaded to Invoca so the algorithm can learn the patterns inherent across customer conversations, in order to effectively make predictions and classifications on new inbound phone calls.

Is AI-Powered Call Analytics for Me?

> "Signal AI has changed the direction of marketing for University Hospitals. Rather than saying, 'This ad drove 10,000 clicks,' we can now say, 'This ad drove 500 appointments, and those appointments went to these specific doctors or locations.'"
>
> **Noah Brooks, Manager of Analytics and Strategy, University Hospitals**

The long and short of it is, if your business uses digital marketing to drive a high volume of customers to the phone, then you need a call analytics solution that uses AI to make the most of conversational data. Any marketer knows the value of first party data, and the data you can glean from people who are calling your business is more accurate than correlating clicks to behavioral intent ever can be. Utilizing a tool like Invoca Signal AI makes it possible to use this data to optimize digital advertising, reduce marketing costs, and reach more potential customers than ever.

How Invoca Call Tracking and Analytics fits in Your Martech Stack

Every shiny new tool seems like it could be a silver bullet to boost your ROI, but before you add to the stack, it's important to understand how a new platform works with what you're already using and how it adds value.

Invoca's call tracking and analytics solution is an important addition for any marketer that needs to get insight into what happens when customers call. It allows you to attribute conversions that happen on the phone to digital marketing efforts and optimize what you're doing to drive more revenue. This is mission critical data, but it's not just another dashboard. Through comprehensive native martech integrations, Invoca is able to add call analytics data to the martech tools you already use.

Here we'll walk through the most popular digital marketing tools and show you how Invoca call tracking and analytics data fits into (and completes) your marketing intelligence picture.

Invoca data can be viewed and used in Google Marketing Platform, Facebook, Adobe Experience Cloud, Salesforce and others.

Google

Google can only provide very basic attribution for phone calls and other offline actions. Here are a few ways Invoca call analytics data supercharges the power of Google Ads and Google Analytics.

Watch these videos to see how it works.

Google Ads

Google Analytics

Adobe Experience Cloud

If Adobe is at the center of your marketing stack, you understand how powerful it is for understanding your customers' journey and creating positive customer experiences. By using call analytics in the AEC via our direct integration, marketers gain a complete view of marketing channels and web session activity driving inbound calls.

Watch this video to see how it works.

Adobe Experience Cloud

Salesforce

If you're an avid Salesforce user, watch this video to see how Invoca works with Salesforce Sales Cloud and Marketing Cloud to take your programs to the next level.

Watch this video to see how it works.

Salesforce Sales Cloud

Note: watch these videos @ invoca.com/product/tour

Other Available Integrations

Invoca also offers native integrations with many other marketing, BI, and telephony platforms including:

facebook   Instagram   Bing ads   Kenshoo   Marin SOFTWARE   ACQUISIO

Microsoft Dynamics   HubSpot   webtrends   Optimizely   Five9

What Makes our Integrations Work

Webhooks

Invoca allows you to use webhooks — user-defined HTTP callbacks — to trigger actions in other systems. This makes it possible to trigger custom actions in your CRM system, point-of-sale system, marketing automation platform, or just about anything else.

APIs

We've developed a robust and thoroughly documented set of APIs so you can extend our platform into just any system you can think of. This gives you ultimate control into exactly how you integrate call analytics into your business.

Binary Signals

In order to maximize the usefulness of Signal AI-measured outcomes, we report them as binary signals: essentially a true/false answer to specific questions like "did a conversion happen?" or "was it a sales call?" Since this is the most common data format used by martech platforms, it makes it easy to integrate Invoca with many types of systems.

Call Tracking AI: Facts vs Fiction

To make sure that your thinking hasn't been skewed by urban-marketing legends, here are five truths and fallacies that will help clear up most common misconceptions about call tracking and AI.
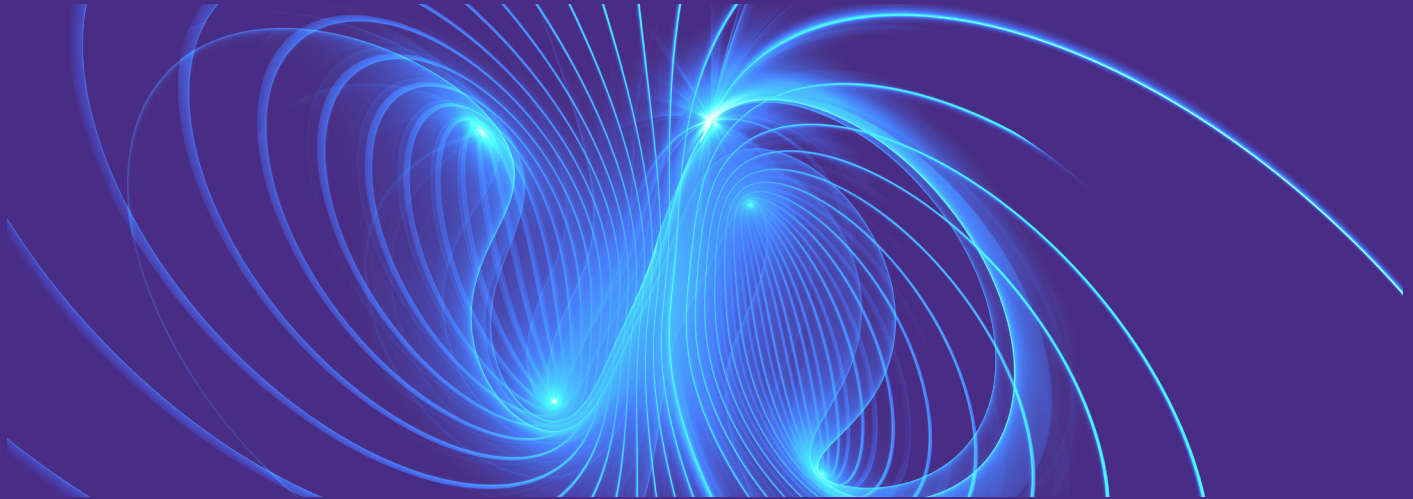
Fallacy #1: Humans Can Classify Calls More Accurately than AI

If a person listens to a call with a customer, they will be able to easily tell if a call resulted in a sale or not and will accurately record the results.

But, hey, at least we can love! Take that, AI. Wait, AI doesn't have feelings. Whatever.

Truth: The Bots Have You Beat

- AI doesn't get tired or bored.

- Every person may identify a call outcome differently. AI is consistent.

- AI can improve over time.

Fallacy #2: Call Tracking AI is Difficult to Set Up

You're pretty tech savvy, and you know that AI isn't born smart, you have to teach it. And that takes for-freaking-ever.

Of course, you can continue to refine these models based on your specific outcomes, or use our custom AI for any use case or industry.

Truth: Pre-Trained Models Get You Going Fast

- Pre-trained AI models are available for several industries like insurance and finserv.

- They can identify outcomes most common use cases, like "policy purchased" or "appointment set".

Call Tracking AI:
Facts vs Fiction

Fallacy #3: **All Call Tracking AI Systems are Created Equal**

On the surface, it may seem like artificial intelligence serves the same purpose and basically works the same way, no matter what call tracking platform you choose.

Be wary of AI claims, as some are just keyword spotters in bot clothing.

Truth: **Invoca's Award-Winning Signal AI is Different**

- Some "AI-Powered" call tracking platforms just use AI for transcription.
- Invoca Signal AI delivers predictive analytics.
- Invoca Signal AI keeps learning & getting better.
- Performance scoring makes accuracy clear.

Fallacy #4: **AI Only Makes Sense For Fortune 500 Marketers**

You need to have a lot of resources and thousands of hours of pre-recorded calls to use Signal AI.

You don't need a giant IT team (or any IT team at all) implement and operate Invoca. If you can drop a tag on a website, you can handle it. And the user interface is familiar to anyone who has ever used marketing analytics or automation software like Google Analytics or Marketo.

Truth: **Smaller Marketing Teams Can Benefit from Call Tracking AI**

- Tag-based deployment makes implementation simple.
- Invoca is made for the marketing user, not IT.

Fallacy #5: **Signal AI is Too Expensive**

We can't justify the cost of using AI for call analytics.

In the end, the ROI gains of accurately measuring and attributing call conversions nearly always outweighs the additional cost of the service.

Truth: **Accurate Attribution Pays for Itself**

- Accurate attribution = better optimization.
- Better optimization = higher ROI.
- Higher ROI = bigger bonus check for you.

Section 201 Checkup

Are you a master of all that's Invoca? Let's see!

Question 1: Humans are better at classifying calls than AI.

○ True   ○ False

Question 2 : You can't use Invoca to measure call-based conversions from YouTube.

○ True   ○ False

Question 3 : Invoca integrates with:

☐ Salesforce   ☐ Google

☐ Facebook   ☐ Slack

Question 4: It's fine to use call volume alone to optimize keywords.

○ True   ○ False

Question 5: How can marketers use data from Signal AI:

☐ Optimize Ad Spend   ☐ Seed Audiences

☐ Personalize Content   ☐ All of the above

Section 201 Checkup

Question 1: Humans are better at classifying calls than AI.

False

Question 2 : You can't use Invoca to measure call-based conversions from YouTube.

False

Question 3 : Invoca integrates with:

Salesforce   Google   Facebook

Question 4: It's fine to use call volume alone to optimize keywords.

False

Question 5: How can marketers use data from Signal AI:

All of the above

301 Study Guide:

Using Call Tracking for Better Marketing

In this section, you will learn to apply everything you have learned so far to improve the ROI of your marketing efforts. This includes how to use call tracking to optimize digital marketing campaigns, why personalized call experiences matter to marketers, and how to enhance the customer journey after the call.

Optimizing Digital Marketing Campaigns with Call Tracking

You know that Invoca's AI-powered call tracking platform can unearth rich insights from phone conversations and attribute call conversions to the entire digital journey. With this complete set of call data you can optimize your digital marketing tactics to drive high-quality calls and also automate subsequent marketing actions like retargeting or suppression in real time.

Here are the four steps to using this data to optimize your ad campaigns:

Step 1:   Track calls and attribute them to previous consumer touchpoints

Step 2:   Unify caller data across multiple sources

Step 3:   Analyze phone conversations to classify call drivers, behaviors, and outcomes

Step 4:   Push call intelligence out to the rest of the marketing stack

Let's dive into each step to make sense of the process.

Track and attribute calls, unify caller data, analyze and classify, push to the marketing stack.
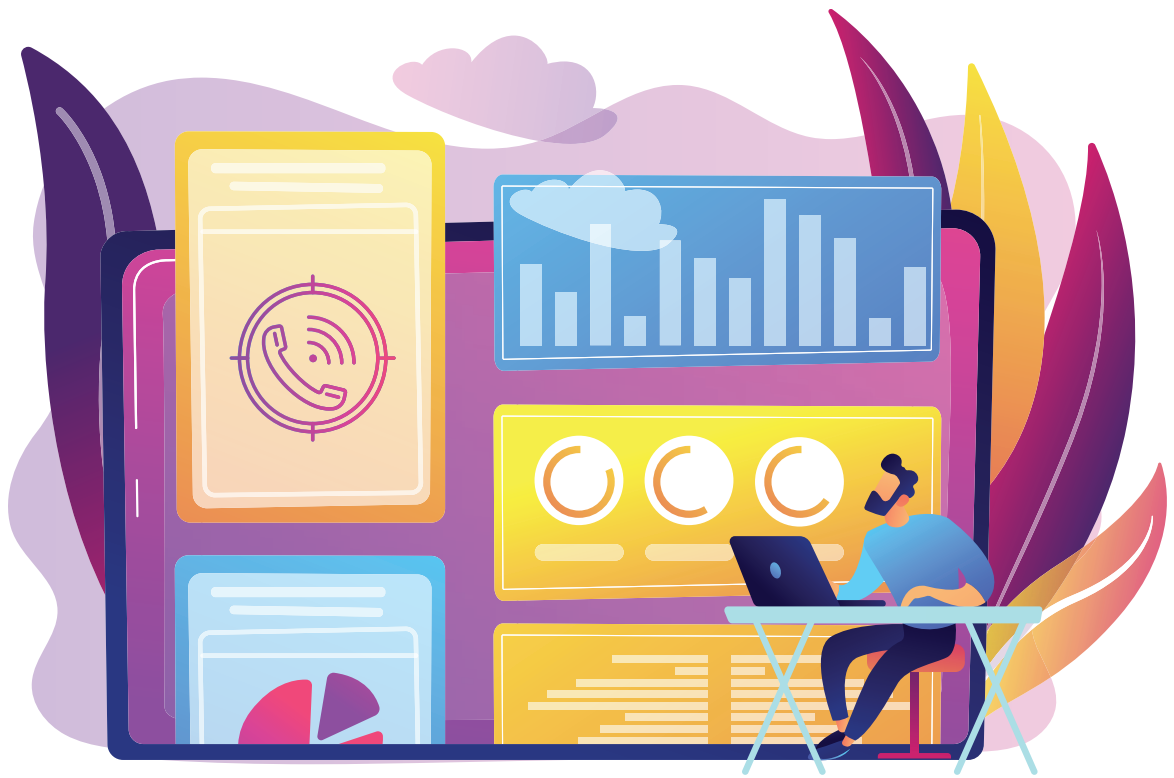
Step 1: Track calls and attribute them to previous consumer touchpoints

Tracking campaign effectiveness has been around since the early days of advertising. Those early marketers used tactics like "mention this ad and get 15 percent off" to attribute the effectiveness of mass channels like newspapers. Of course, you're probably more familiar with the digital world of attributing clicks to conversions. *the ability to connect individual callers and marketing touchpoints to conversions that happen on the phone.*

The challenge with calls is how to create 1:1 attribution with prior digital touchpoints. After all, "mention this ad when you call" doesn't really get us where we need to be. Enter dynamic number insertion, the key technology that makes 1:1 online-to-offline attribution possible.

Dynamic number insertion, or DNI, uses JavaScript code to replace static phone numbers on your website with a phone number that's unique to each customer.

But how is this possible? Wouldn't you run out of phone numbers pretty quickly if thousands of people visit your website every day? Well, you would if you didn't recycle them. The reality is that if a consumer doesn't call within an hour of visiting your site or seeing your ad, there's a very small chance that they'll end up calling that number. Therefore, we can then safely reuse that number, exposing it to a new consumer after a given expiration period.

> "No matter where our ad is, with Invoca we get the attribution. It's no longer a gut-check—now I have the proof, I know whether or not the ad buy is working and if it's making the right people people call."
>
> **Bill Denninger, Director of Business Operations, Weitz & Luxenberg**

Step 2: Unify caller data across multiple sources

In order to create that sweet, sweet closed-loop attribution, you need to capture data for each unique consumer. This information is contained in a caller profile, where a marketer can store a veritable cornucopia of relevant data. These data come in various forms:

Think of this like cookies or campaign data.

1. Customer journey data like ad exposure and website visitation

2. First-party data, like customer records *This is pulled from the CRM*

3. Third-party demographic data

4. Call data that includes standard metrics like length of the call, time of day, caller area code, and more *This comes from Invoca*

5. Conversational data derived from speech analytics and other AI-based tools (more on this in the Step 3)

By unifying these datasets into a rich caller profile and associating it to the phone call, you now have the basis to understand which marketing programs are driving the most calls, and begin putting this information to good use. Great work! Pack it up, your job is done, right? Not quite.

You also have to know that you're driving the right calls. After all, not every website visitor is of the same quality. Some bounce right away, while others stick around and complete a purchase. The same goes for callers. Some are looking to buy, while some are looking to get product information or just complain about the weather.

To understand the unique value of each call, we need to dig deeper.

Step 3: Analyze spoken conversations to classify call drivers, behaviors, and outcomes

Let's say you get 1000 calls into your call center each day, and you know you make 100 sales from those calls. You also know that half of people that do convert have called in a few times before finally pulling the trigger. How can you determine the 10 percent of the calls that you really want? And perhaps even more challenging, how can you identify the high-quality prospects that may convert on a follow-up call?

It's easy to forget that your customers are actually telling you where they are in the buying process. They're telling your call agents things like "let me call you back tomorrow when my paycheck clears," or "I'm almost ready to buy, let me check with my wife and call you back." This conversational data is is critical to understand, and most marketers are leaving it on the table.

To feasibly classify these conversations into useful digital datasets, you need an automated system that can understand what's being said and accurately derive meaning from it. Enter Signal AI machine learning-powered predictive analytics technology can analyze your callers' conversations and turn them into actionable marketing intelligence. With Signal AI, not only can you predict whether a conversion happened on each call, you can predict things like caller type (e.g. service call vs. sales call), as well as milestones on the path to conversion. And when you understand the nature of a call, you can optimize your media for higher ROI, improve marketing effectiveness, and personalize the customer journey.

Signal AI can predict if a call resulted in a sale or if it was a service call.

Call Drivers

- Product interest
- Promotion
- Referral

Call Behaviors

- Product experience
- Information gathering
- Cross-sell offer made

Call Outcomes

- Purchase/returns
- Appointment booked
- Service activation

Step 4: Push call data to your marketing stack to optimize campaigns

Learning something new about your campaign is good. Optimizing your campaigns based on that information is much better. For instance, if campaign A is driving more profitable calls than campaign B, you would want to see this attribution information reported in the same place that you manage your campaigns.

If calls are important to your business, then you want call intelligence pushed into all the marketing platforms that matter to you, whether it's search marketing, programmatic advertising, analytics tools, email marketing, or any one of the hundreds of martech solutions out there. We call this data accessibility, and it's why data formats and integrations are so important.

Exercise:
What's Wrong with these Campaigns?

Imagine that you are A/B testing a few paid search ad campaigns for a mortgage provider to see which one results in the most conversions. Using Invoca, you find that ad A is driving calls for checking accounts instead of mortgage quotes. What's going on?

Ad A:

Corp Bank Trust | Home Mortgages 1-888-888-8888

Ad corpbanktrust.com

Committed to Serving Your Financial Needs. Apply Online! Member FDIC. Zero Liability Protection. Online Banking. Instant Issue Debit Cards. Services: Mortgage, refinance, Online Banking, Convenient Mobile Banking, Debit Card On/Off, Money Management Tools.

Ad B:

Today's Lowest Mortgage Rates | Apply Now 1-888-888-9999

Ad corpbanktrust.com

★★★★★ Rating for Corp Bank Trust Mortgage: 4.9 - 2,250 reviews

Corp Bank Trust has the best rates and lowest fees around. Call now to get started with our mortgage pros on our simplified application process.

The copy in ad A is too broad. People who are searching for checking accounts, the bank itself, or mortgages may land on it. Ad B is focused on mortgages and rates alone, so it drives a higher rate of callers completing applications for quotes. While this is a fairly obvious example, Invoca can help you spot much more nuanced issues with paid search ads.

Why a Personalized Call Experience Matters to Marketers

Before you skip this section because call experience seems like something that the call center folks should be worried about, first think about how caller experience can affect marketers, too.

A Bad Experience = No Sale

So you've nailed down all of the right keywords, optimized your spending, and dialed in your audiences. You know that you've been successful at getting the phones ringing, but there's a problem—conversion rates are unusually low. How can that be when it's obvious that you're getting more high-intent customers on the phone? Are the call center reps going off script or being jerks? Probably not. The call center might be experiencing some problems that are out of their control.

When the caller has a poor experience before they can even talk to anyone, conversion rates go down and that makes your marketing efforts less effective. But the right call tracking and analytics platform can also address these issues.

No matter how good your marketing is, a bad call experience drives down conversions.

Create a Frictionless, Personalized Customer Journey

Since your customers are jumping across channels from online to phone, it's critical that the call center knows where they have been, who they are, and why they are calling. Without this information, friction is increased because the call center has to deal with:

- **An incomplete view of caller information**
- **Lack of context**
- **Calls being routed to the wrong place**
- **Frustrated callers**

With Invoca, the call center can retrieve real-time insights about a caller, including their previous engagement history as well as the keyword and ad campaign that drove the call. This data can be used to automatically route and filter calls so callers are sent to the person or department that can best help them without sending them through the phone tree.

Invoca can be used to route callers to the right place.

With this information in hand, call center reps can more efficiently and effectively work with the customer to make a sale. For example, if a customer has an item in their shopping cart and calls before completing the purchase, they can be routed directly to an agent who knows what they have in their cart and why they are calling. DISH Network, for example, found that many of its online shoppers were abandoning their carts when it came time to provide private information like social security numbers. To make sure it could convert these customers, it used Invoca to seamlessly direct cart abandoners to a call center experience specially tailored to their needs.

By setting up a few rules in the Invoca call routing logic, calls are automatically routed to the correct department based on the customer's product interest, and support calls are sent to customer service.

All of this put together makes for a frictionless customer journey. All along the way, the caller feels like you know what they need and know who they are, so they leave as a happy customer and you see better conversion rates.

"With Invoca, we've transformed an online conversion with a throughput of less than 5% into a phone call that closes in the high 60% range."

**Russell Bangert, Director of Digital Marketing, DISH Network**

The Results of a Personalized Call Experience

By smoothing out the journey, the customer is focused on making a purchase instead of on their frustration with the experience. The results are pretty staggering. SunTrust Bank employed personalized call routing automation using Invoca, which reduced the number of transfers that customers experienced by over 40 percent. If you have ever been kicked around from department to department while on the phone, you know how frustrating it can be — every transfer increases the likelihood that you hang up.

Automatically routing callers to the right places increased call center efficiency by 60 percent for SunTrust, which means that sales associates were answering far more phone calls. Call duration also jumped from four minutes to over 16 minutes, which indicates that sales associates were taking applications versus simply answering questions.

What does this all mean to you? More calls answered means more chances for conversions to happen. In SunTrust's case, this also led to reducing their cost per conversion by half while boosting paid search conversions by 50 percent. What at first look like wins for the call center are actually big wins for the marketing team!

With real-time insights about the context of the call and the caller, coupled with intelligent call routing, **our customers have seen 10x increases (or more) in conversion rates.** This proves that caller experience not only depends on marketing, it makes a big impact on your success.
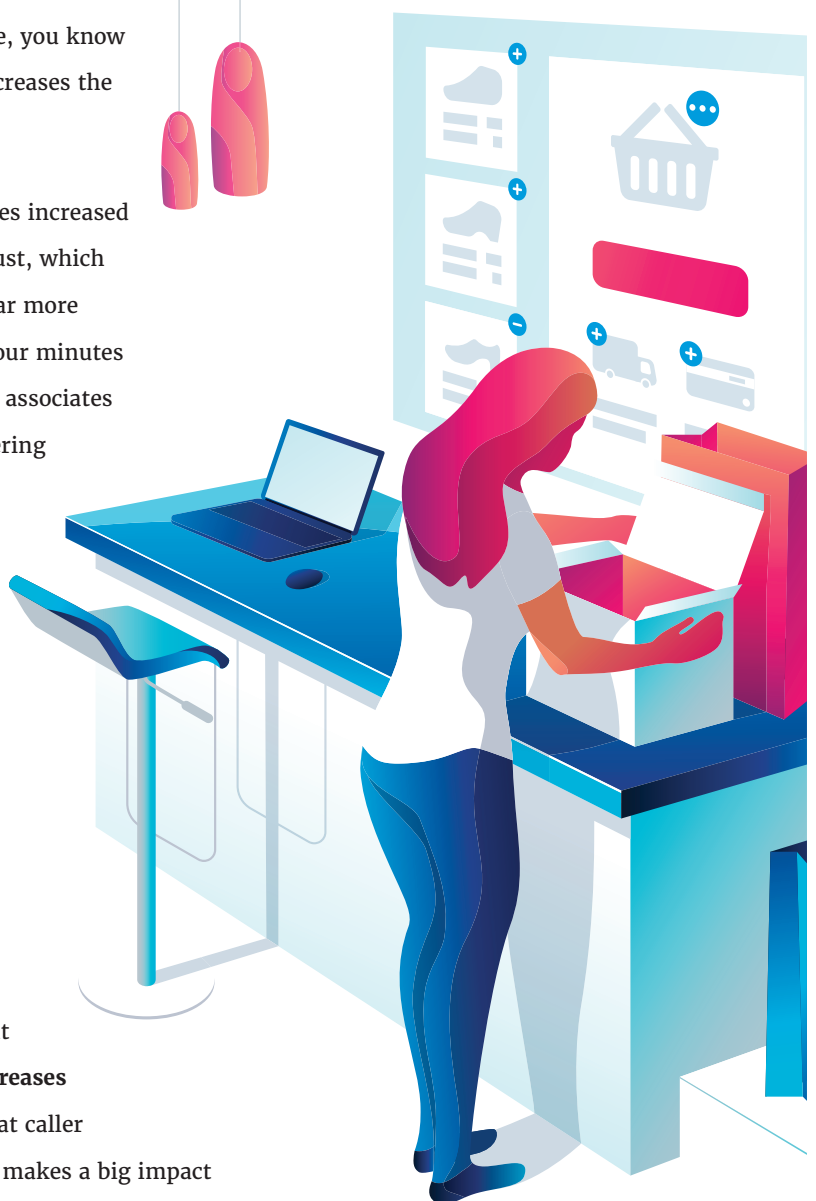
Call tracking can decrease marketing costs AND increase conversions, so we can focus more spend on high-intent customers!

Enhancing the Customer Journey After the Call

Whether or not a caller made a purchase, there's a huge opportunity to connect that offline action (the phone call) to the rest of digital customer journey. Here are three ways that call tracking can be used to enhance the journey after the call.

Can use this to make sure customers don't get retargeted with discounts after they buy.

Ad Suppression

How many times have you seen an ad for something you just bought? It's not only annoying for customers, but retargeting people who already made a purchase costs you money and nets no conversions.

Invoca's Signal AI solution can be used to automate ad suppression for every customer, improving the experience for the customer and saving you money because you're not paying for their eyeballs after they buy.

Retargeting

In a similar vein to ad suppression, Invoca lets you retarget people who called, but didn't end up purchasing. Instead of letting them fall into the abyss after placing a call, marketers can pick up the digital journey where it left off. For example, if a caller expressed interest in a particular product line, they could be retargeted with display ads featuring promotional pricing for that product.

Nurture and Upsell

Renewals, upsells, and cross-sells are important parts of customer retention. It's important to really know your customer to effectively grow the relationship and increase business. For example, with Invoca's integration with Salesforce Marketing Cloud, you can automatically trigger a nurture email campaign after a purchase is completed over the phone in order to stay in touch with your customers.

You know that the customer journey doesn't end at the phone call, so it's important that your marketing intelligence doesn't end there either.

Section 301 Checkup

Question 1: What are the four steps to using call data to optimize your ad campaigns?

Question 2 : Creating a personalized call experience can increase conversion costs.

◯ True   ◯ False

Question 3 : You can run out of dynamic phone numbers if too many people call.

◯ True   ◯ False

Question 4: Signal AI can help you predict:

☐ Caller type   ☐ If a sale happened

☐ If the caller will convert in the future   ☐ All of the above

Section 301 Checkup

Question 1: What are the four steps to using call data to optimize your ad campaigns?

Track and attribute calls, Unify caller data, analyze and classify, push to the marketing stack.

Question 2 : Creating a personalized call experience can increase conversion costs.

True

Question 3 : You can run out of dynamic phone numbers if too many people call.
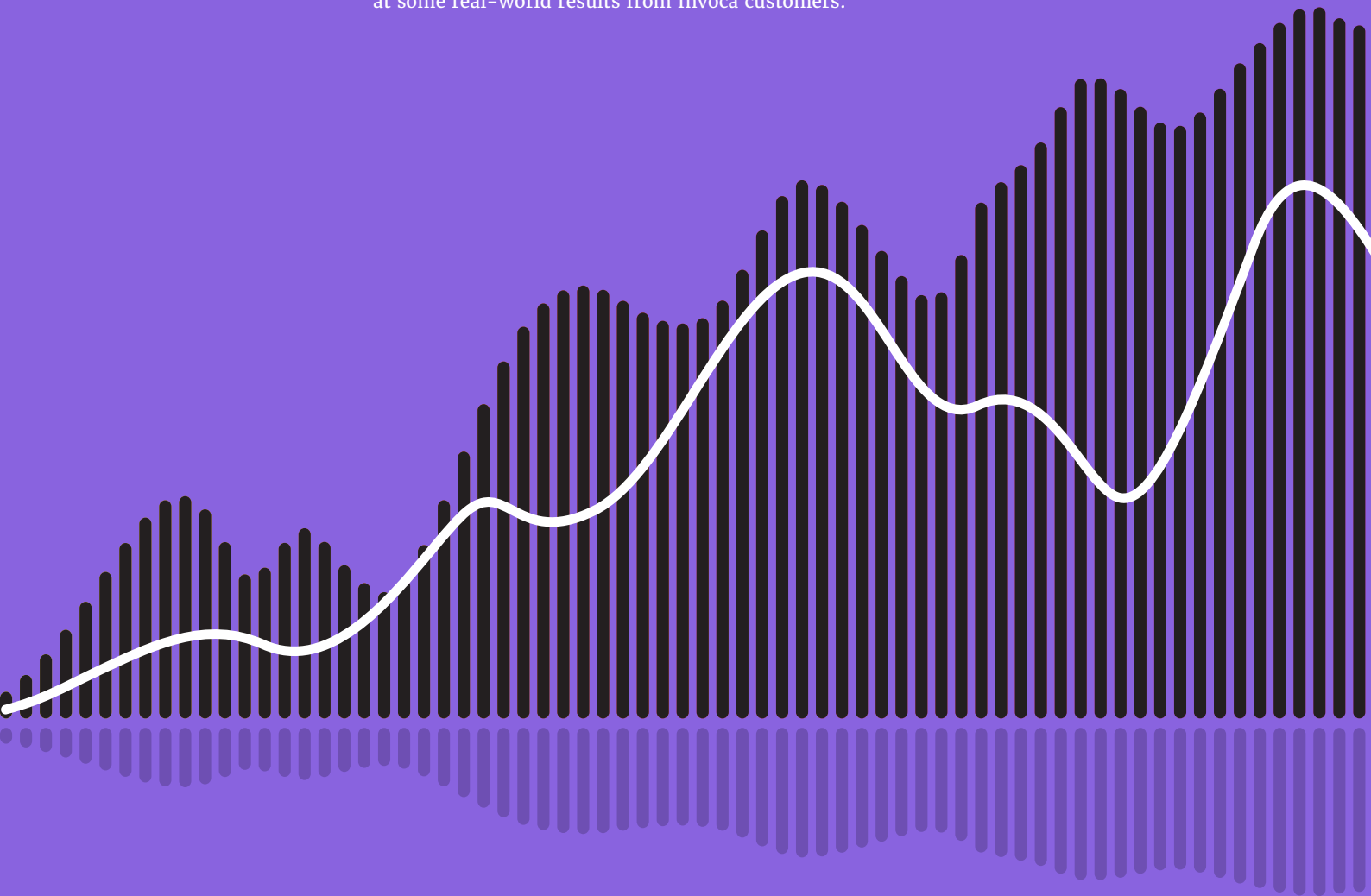
False

Question 4: Signal AI can help you predict:
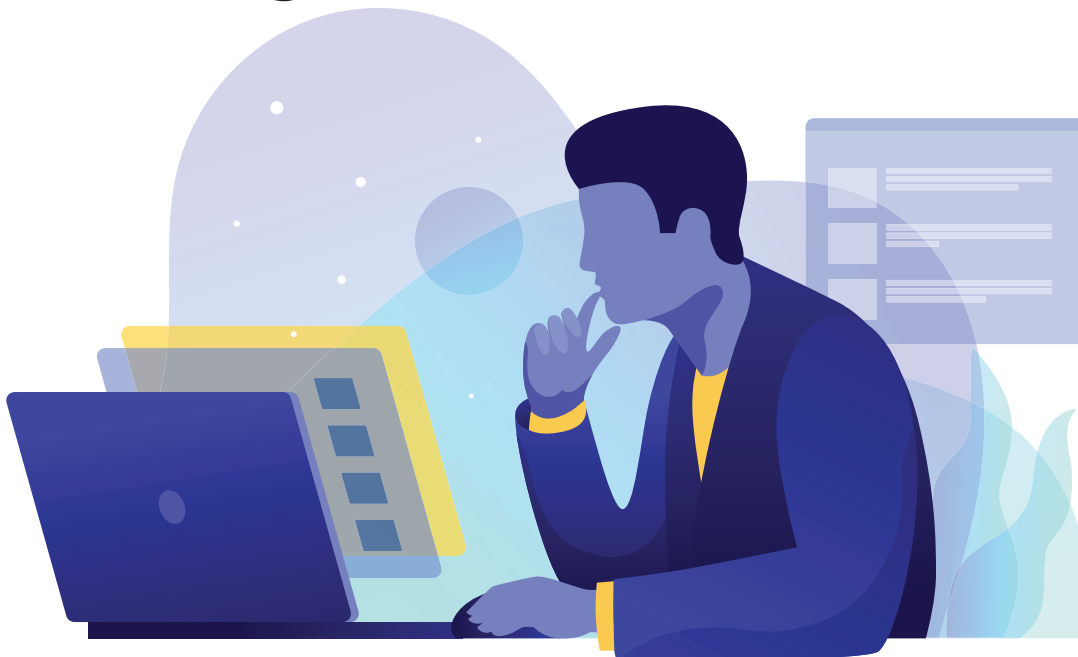
All of the above

401 Study Guide:

Implementing Call Tracking & Getting Results

Now that you know everything Invoca can do, we'll show you what it takes to get stakeholders on board with purchasing a call tracking platform, how to select the right vendor, and take a look at some real-world results from Invoca customers.

How to Sell Call Tracking to Your Boss

For many marketers, buying a call tracking & analytics solution is a net-new kind of technology purchase, for others it's an upgrade from basic or broken systems. You may know you need it but, it can be a daunting task to convince your boss. With the right research and prep, it can be relatively easy to sell the purchase internally, and get the support and resources you need to get you that sweet, sweet call tracking & analytics platform you want.

Calculate the ROI of a Call Tracking Platform

Start with the business metrics that are most important to your boss — volume of conversions, cost per conversion, appointments booked, sales made, etc. Then figure out the direct impact that call tracking will have on those goals. A simple ROI calculator can be a great first step in this process. Invoca has built an interactive online tool that helps you calculate how much potential revenue is being driven by calls that you aren't measuring or getting credit for. From there you can estimate the increased number of conversions, appointments booked, etc.

Ask your sales rep to also provide similar metrics for other customers that had similar goals, and saw them achieved after implementing Invoca.

Together you can craft a clear proposal and plan for how the technology investment will impact your marketing bottom line.

For example, let's say you're focused on using call attribution and real-time call insights to help you to optimize your paid search strategy and drive high-quality call conversions. This is a common use case, and our customers have seen an additional 40 percent to 60 percent increase in conversions with no additional media spend. Look at your estimated revenue per conversion, multiply that times the number of conversions a 40 percent increase would entail, and you have your business growth case. Subtract the cost of Invoca from that, and you have your high ROI. It'll be hard for your boss to argue with that!

Invoca customers have seen up to 60% increase in conversions with no additional media spend.

INVOCA

Do Competitive Research and Present the Best Option

When shopping for a new tool like call analytics, there are likely to be a few companies that claim to offer the same product capabilities and benefits. Any boss worth their title will expect that you've vetted the top few and can clearly explain why the one you're recommending is the best for your company's needs.

Make sure you're able to clearly articulate a few clear bullet points on the specific value you'll get from the vendor you're recommending, and why you think these particular areas provide the most important benefits to your company. For example, many marketing teams choose Invoca because of our enterprise-ready features — we're the only vendor that is fully PCI certified, and GDPR and HIPAA compliant, which is crucial to companies in industries like healthcare and financial services. Or for marketing teams focused on sophisticated digital personalization strategies, our Signal AI product is the only of it's kind to deliver personalized and accurate call conversion data seamlessly into your digital tech stack in real time. This is crucial if your marketing team is focused on creating personalized digital content and retargeting experiences on a per-customer basis.

Your sales rep can help you with some of the leg work here (also see the 10 questions to ask vendors below.) If you clearly articulate the business KPIs and strategic marketing initiatives that are most important to you (and your boss!) they should be able to help you understand their key points of differentiation and benefits to your business.

Get Customer References

Even if you've crafted a compelling proposal based on the tips above, firsthand customer references are one of the best ways to help justify making a new investment and will be more than just icing on the cake. Sure, you understand that buying a call tracking and analytics solution like Invoca will help boost your marketing performance, but what if the head of digital marketing at a successful company (one that that looks like yours) told your boss instead?

Case studies are a good start here, but personalized, 1:1 reference calls with happy customers are a sure way to win. Again, this is an area to leverage your sales rep. Say you want the chance to speak with a happy customer or two from a business with a similar marketing model.

How have they implemented call analytics? What call data and insights are they using and how has it impacted their marketing results? How easily and effectively is call data integrated with the systems you already use? What has the customer service and support been like? This is an especially important question to ask when buying a new technology, and the right answer can help your boss understand the implementation and roll-out process will be positive.

By doing your research, leveraging the support and knowledge of your sales rep, and turning to customer references for honest endorsements, your boss should be happy to approve your call tracking & analytics purchase. Even better, they'll be impressed by the major marketing improvements you'll be bringing to the team!

"The Invoca Account Management team is great. They really care about what our business is, and that's important because there's a lot of vendors that we deal with for different technologies that disappear once you sign the contract. Invoca is very involved in the onboarding and adoption."

Dan Williams, Chief Revenue Officer, 3 Day Blinds

10 Questions to Ask Call Tracking Vendors

You have a handle on what call tracking can do for your business. You know how it works. And now your boss is on board with purchasing a new solution. The next big step is choosing the right vendor for your needs.

When it comes to advanced platforms, comparing features, services, and integrations is even more important. Some things like price or service packages are easy to evaluate and compare. Others — like fraud protection or strength of integrations — can be a bit tougher. And then there are questions that you should be asking that you aren't aware of yet (since you never know exactly what you'll need until you get your hands dirty!).

To help you with your vendor selection process, we've narrowed all the questions that you could ask to the 10 most important. Let's do this.

1. How granular is the call attribution analytics?

👍 **Things to look for**

In order to maximize the usefulness of call data, you'll need to capture any data from the website (e.g. URL query string parameters, first party cookie values, HTML elements) and attribute this data to the individual visitor, all the way to the phone call. Find out if the call tracking solution can track and capture data to the keyword level for search ads, or ad level for Facebook and display. And then look to see if their integrations with your ideal martech stack support such granular attribution.

👎 **Potential pitfalls**

Many call tracking solutions only support attribution at the campaign level and are unable to collect/report out data types like search keywords. Some solutions don't support 1:1 consumer-level attribution, either. You'll be limited in your ability to optimize your campaigns or build meaningful audience segments if you end up with a solution that can only support high-level attribution.

2. How does the solution track call conversions?

👍 **Things to look for**

There are a variety of call conversion types that you might want to measure, such as purchases made, appointments set, or quotes given. In order to make the best media optimizations, you need solid closed-loop attribution. So find out how your call tracking solution tracks and associates call conversions to the online activities that preceded them. For instance, you may already be tracking these conversion events and simply want a way to push this data into your call tracking solution through a file upload or API call. Or you might want a solution that can automatically detect conversions for you.

👎 **Potential pitfalls**

Many call tracking solutions simply count calls and cannot actually track conversions. The value of call counting is not comparable to conversion measurement since only a fraction of inbound calls result in a conversion. Think of it this way: would you be happy optimizing to click-through or would you rather measure and optimize to clicks that resulted in sales?

3. Can the solution accurately and automatically detect call outcomes?

👍 **Things to look for**

If you're relying on the call tracking solution to detect conversions for you, accuracy is everything (after all, optimizing to non-converters isn't helpful). Make sure to find out:

- Exactly how the system measures conversions
- How open the solution is about providing accuracy rates
- If the end user can give the system feedback to improve **accuracy**

👎 **Potential pitfalls**

Proxy conversion metrics like call duration or keywords spoken are often inaccurate and should only be used as directional indicators of call quality, conversions. Also, be wary of "black box" algorithms claiming to measure good calls vs. bad calls. If the system isn't up front about exactly what makes a good call and its predictive accuracy, that's a red flag.

4. Are the call outcomes detected by the solution specific to my business?

👍 **Things to look for**

Each business is unique, and the metrics that matter to you are probably unique, too. While out-of-the-box conversion detection often works, your specific call outcomes may look slightly different than another business'. This variation in outcomes results in inaccuracy in conversion detection. If you want to accurately measure conversions, look for a system that can customize call outcomes to your specific needs.

👎 **Potential pitfalls**

Be aware of "one size fits all" good call/bad call conversion detection. While this might be a good option in order to get started quickly, you'll eventually want to measure call conversions unique to your business/campaign/promotion and other call behaviors or call drivers to gain more insight about your customers.

5. Is the call outcome conversion data actionable?

👍 **Things to look for**

In order to maximize the usefulness of your call data, you'll want call conversions reported just like any other digital conversion data: as "true" or "false." "Did a conversion happen or not?" Or "was it a sales call or not?"

👎 **Potential pitfalls**

Some systems will report call outcomes in the form of a quality score or other similar metric. If this data cannot be passed into your media or audience management platforms, then the ability to attribute and take action on this data will be severely limited. Nearly all platforms understand "true/false", but other variable metrics may not be processed without expensive and time-consuming workarounds.

6. Does the solution integrate with my martech stack?

👍 **Things to look for**

First, look for the standard, out-of-the-box integrations that are important to you like Google Ads, Salesforce, or Adobe Experience Cloud. Ask for customer references to understand how well these integrations are supported. Second, find out how flexible the solution is: can it support custom integrations and can it report both call volumes as well as call conversions?

👎 **Potential pitfalls**

Without getting overly technical, some solutions aren't architected to support many different types of integrations. If a specific integration is critical to the success of your call tracking program, make sure it works before signing on the dotted line. Furthermore, ask to speak with existing customers to see how well the desired integration is working for them.

7. What other use cases does it support?

👍 **Things to look for**

Media optimization is the primary use case that most marketers are looking for when evaluating call tracking vendors. However, many systems can be leveraged for additional use cases like orchestrating the post-call customer journey or personalizing the caller experience to boost conversion rates. If you're serious about call tracking, chances are that you'll want to expand your use of the platform as you get more familiar with the data it provides.

👎 **Potential pitfalls**

Some solutions don't offer much more than call reporting and attribution. Find out if you can push caller data or audiences into media orchestration platforms like Adobe or other DMPs. Find out if the vendor can integrate with contact center software like Five9 or can help route calls based on pre-call data (like products viewed or shopping cart activity). If not, it will substantially limit how much use you can get out of the platform.

8. Is the solution HIPAA, PCI, or GDPR compliant, and what compromises will I need to make?

👍 **Things to look for**

If you work in a highly-regulated business like healthcare or banking, understanding how call tracking will affect your compliance must be a priority. Look for companies that support HIPAA for healthcare and PCI DSS for financial services.

👎 **Potential pitfalls**

With many call tracking platforms, you need to make compromises in order to maintain compliance. For instance, some platforms that claim HIPAA compliance, but only meet it by turning call transcription and recording off completely. Automatic call redaction (which uses speech recognition to remove sensitive information from call recordings and transcripts) is required to record calls and meet HIPAA standards. Keep in mind that if you turn off transcription, you won't be able to extract insights or detect call outcomes from the phone conversation.

9. Will the solution be there when you need it?

👍 **Things to look for**

Find out about platform uptime and how it's measured. Are there redundancies in place to ensure your business is never interrupted? What's the historic uptime for both the web application and call infrastructure?

👎 **Potential pitfalls**

Two things can go wrong: the web application goes down (Bad! You can't log in and see your data) or the telecom infrastructure goes down (Really bad! Your calls don't go through.)

10. How self-service is your platform?

👍 **Things to look for**

When you change a number on your site or want to adjust how you measure conversions, would you rather do it yourself or email someone and wait for them to do it for you?

👎 **Potential pitfalls**

Some call tracking solutions offer nice reporting platforms but very little by the way of actual self–service. Depending on your service level, you might be waiting a while for your measurement partner to get set up in order to launch that new campaign, and who wants that?

Of course, there will be other questions specific to your business and use case that you may want to ask, but these 10 questions will get you well along your way in selecting the best call tracking vendor for your organization.

Real-World Results from Invoca Customers

Reminder: watch these customer videos @ invoca.com/customers

501 Study Guide:

How to Get Buy-In for Invoca in Your Organization

Get the call tracking & analytics conversation started

You know that your organization will benefit from using Invoca. Of course, you're not the only one involved in the decision-making process. There are stakeholders in marketing, sales, the contact center, procurement, and beyond who need to understand the value of adding Invoca to your martech stack. Our goal is to make sure you are successful. That's why we're providing the following assets to help you get buy-in for adopting AI-powered call tracking and analytics in your organization.

1. This Reference Guide will help you understand what's important to each of your teams and stakeholders that are involved in the process and help you answer the questions they will ask.

2. The Powerpoint Deck we have put together for you will make it easy for you to create customized presentations on the value of call tracking and analytics.

3. The Call Tracking Study Guide for Marketers is a complete guide for those who want to dig deeper into how call tracking works, why marketers need it, and how to use it

Building your argument with data

The first thing you need to do is gather as much information as you can to quantify the value of this investment. Your executive team may not have the context to understand why you need Invoca and things that seem obvious to you can be totally foreign to them. If you keep your argument high-level and clear, it's not hard to get the point across. Here are the data points you will need to calculate your ROI on Invoca and how to get them:

Number of inbound calls per month

This will likely include service and sales calls. You can usually get this number from your director of sales or from the call center.

Conversion rate of calls

This is how many of those calls ultimately turn into sales. You can usually get this number from your director of sales or the call center.

Average conversion value

This is the average value of a sale that results from a phone call. If you don't have this number available, you can divide your revenue derived from calls by the number of sales-related called that converted.

Percentage of inbound calls that are sales-related

This is the percentage of those calls that are customers who are interested in making a purchase. You can usually get this number from your director of sales or the call center. If you only know the number of sales calls and not the total number of calls, that's fine, as that is the number we are trying to get at with this percentage.

Percentage of revenue driven by phone calls

This is not needed to do the ROI calculation, but it is a good number to have to show how valuable phone calls are to your business and why you need to optimize marketing for this high-value sales channel.

Justifying Investment with ROI

With this information in hand, you can work with your Invoca sales representative to fill out the ROI calculator. If you do not have exact numbers immediately available, use your best estimates to provide a realistic example of the impact Invoca will have. This will help you show how Invoca pays for itself—and then some. More revenue coming in is the language that everyone in sales and marketing understand.

Your Invoca sales rep will work with you to complete your ROI calculations.

The Key Messages for Selling Invoca Across Departments

How you communicate the urgency of adopting a call tracking and analytics platform depends on who you're talking to. Here are the top-line messages that you'll want to communicate with the most common stakeholders.
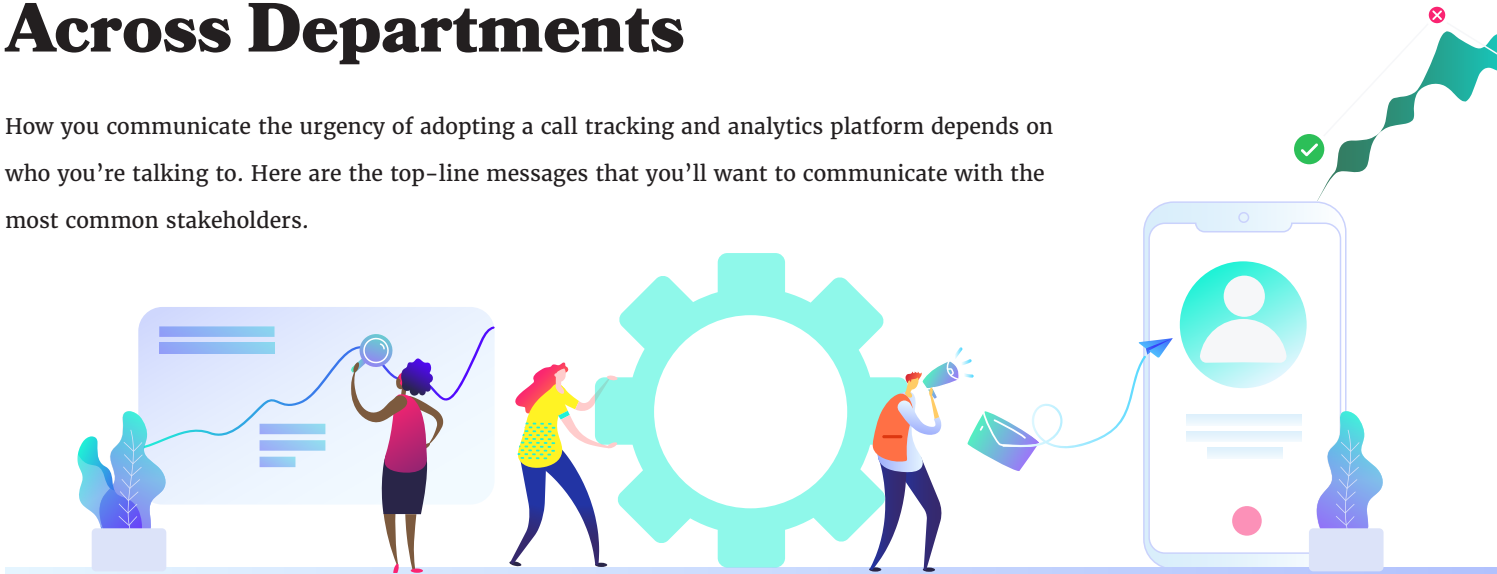
Marketing

Concerns:

We're spending significant marketing dollars driving inbound sales calls but we don't have the data needed to optimize for this revenue. We can't say for sure if we're driving sales calls or costly customer service calls with our marketing. We can only guess what keywords are actually driving revenue, and this might be an expensive mistake.

How Invoca Addresses:

Invoca provides granular call and conversion data from the first click to the end of the conversation, allowing us to precisely optimize our marketing to reduce CPA and increase ROI. It also integrates and shares data with all of the martech platforms that we already use like Google Analytics, Adobe Experience Cloud, Salesforce, and more. This means we're not adding yet another platform—we're getting first-party data that makes the platforms we already use better.

C-Suite

Concerns:

Inbound sales calls represent a big proportion of our revenue and consumers that purchase over the phone have a higher lifetime value. Yet we're lacking solid analytics on this critical channel.

How Invoca Addresses:

Implementing a call tracking and analytics platform will allow us to finally tie marketing to sales, so we can run more efficient marketing campaigns, drive more sales calls, and improve daily execution.

The call center has distinctly different concerns than other departments. Be sure to address cost control, low disruption, and call quality.

Analytics

Concerns:

I don't have adequate data to analyze about what happens on phone calls to provide to marketing decision makers. The call center only provides limited call data, which I fear is inaccurate and is not available for weeks after calls are placed.

How Invoca Addresses:

Invoca will provide marketing analytics and previously unobtainable granular analytics and reporting so we can ensure that every decision maker has the data and insight needed to make the best possible business decisions. And Invoca's native integrations allow us to easily pass data to other systems for deeper analysis. API connections, Amazon S3 data deliveries, and integrations with martech platforms like Google Analytics, Adobe Experience Cloud, Salesforce, and more mean that we're not adding yet another platform—we're getting first-party data that makes our analytics even more accurate and meaningful.

Contact Center

Concerns:

We're afraid that we will have to rip-and-replace our current phone system to use Invoca, and the way we're doing things now works fine. We cannot risk impacts to call uptime, disruptions to our call flow and call quality by adding another system or replacing what we are already using. Moreover, we need to keep costs under control and we can't afford another platform.

How Invoca Addresses:

Invoca provides exactly what the call center needs: low disruption to business processes, reduced costs, increased conversion rates, and lower CPAs. Invoca sits in front of the call center, so It has no impact on the existing telephony system, and any technology that we are using can remain in place, unchanged. Invoca's class-leading 99.99% uptime means we won't miss a beat from platform downtime, it will not degrade call quality (Invoca has a 4.4 MOS for call quality) or disrupt our existing IVR. It also helps us more effectively route calls, significantly reducing hold times and making more efficient use of our agents. Further cost savings are realized through spam call blocking and session initiation protocol (SIP) routing that can reduce telecom costs.
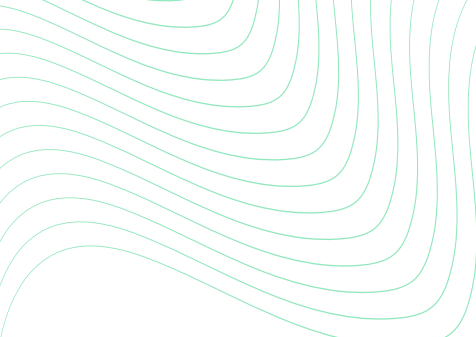
Agency

Concerns:

We face long delays in getting attribution data from you, which makes it very difficult for us to optimize your campaigns. Because of this, we also have a hard time showing how our PPC campaigns are driving ROI, because we have to rely on your call center to provide conversion data, which is frequently inaccurate if we can get it at all.

How Invoca Addresses:

With Invoca, we get our call conversion data in real time, so we can optimize campaigns and call routing to affiliates on the spot. For the first time, we can also vouch for the accuracy of our conversion rates and call counts. We can even show you conversion rate data from phone calls before you can even get the data from your own call center. Since we can both look at the dashboards in Invoca and it's a trusted call tracking solution, you'll have no doubts that the data we provide is accurate and that we are boosting ROI. And integrations with Google Ads, Bing, Kenshoo, Display & Video 360 means we're not adding yet another platform—we're getting call data that makes the platforms we already use better.

IT & Web Development

Concerns:

There's no way we have time to implement a platform that touches so many other systems. We have to make sure that everything we select meets our tight security and compliance standards, and we have to make sure this is solid technology that won't let people down and disrupt our business. Because if it does, everyone will blame us!

How Invoca Addresses:

Invoca has IT covered with class-leading reliability, compliance, data security, and ease of deployment. Invoca's JS tag can be deployed with your preferred tag manager, such as Google Tag Manager or Adobe Launch, making implementation and maintenance on the website a straightforward process. Invoca has industry leading uptime of 99.99% and meets enterprise compliance standards including HIPAA, GDPR, PCI DSS, Privacy Shield, and TRUSTe with all features enabled. It also has controls for call recording, data redaction, and data access. The Invoca platform was built in the cloud to be highly available and redundant to ensure the business is never interrupted. Multiple leading and geographically diverse telecom carriers and cloud service providers ensure coverage in case of local outages.

Procurement

Concerns:

We want to make low-risk software purchases that won't come back to bite us. I don't know how Invoca is going to make us money or if it's proven technology.

How Invoca Addresses:

Invoca has a proven track record of ROI for enterprise brands like LendingTree, DISH Network, Mutual of Omaha, Navistar, Frontier Communications, and many others. They have been a long-time customer satisfaction leader on G2 Crowd, Forrester said the technology is "advancing state of the art call classification" and they have won awards from the likes of Aragon Research, ClickZ, and CB Insights. Additionally, platform and call uptime is 99.99%, well above the SaaS industry standard. Overall, Invoca is a low-risk, high-reward proposition.

Use the ROI calculations to quantify the overall value of your proposed solution and share the IT talking points above as well.

Common Questions About Invoca Answered

Many people in your organization may not be familiar with call tracking and analytics. Understandably, they'll have a lot of questions. Fortunately, we have heard them all. Here are the answers to the most common questions you'll hear.

What problem does Invoca solve?

If your marketing strategy involves driving potential customers to the phone, you could be missing out on important attribution data as well as the best source of first-party customer data. While you have access to end-to-end customer journey data and attribution from purely digital campaigns, the data trail goes cold when your customer picks up the phone. Invoca call tracking and analytics allows you to close that data gap and gain an untapped source of customer and marketing attribution data. Simply put, Invoca allows you to get all of the same attribution data that you get for online interactions for actions that happen on the phone. This allows you to optimize your digital marketing to drive high-quality phone calls and increase your marketing ROI.

What kind of data does Invoca capture from a phone call?

Invoca captures data from both the callers' digital journey and actions taken once on the phone. These data include:

Conversational Analytics

- Call outcome (purchase made, application submitted, appointment made, quote given,etc.)
- Spoken keywords

Digital Campaign Data

- Source campaign
- Marketing channel
- Ad group
- Terms and keywords
- Partner IDs (Google Click ID, Adobe Marketing Cloud Visitor ID, etc.)
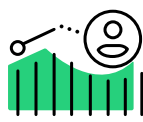
Contextual Data

- Calling page
- Shopping cart activity

Call Data

- Call start time
- Keypresses
- Call duration
- Caller ID
- Call recordings
- Repeat caller

Demographic Data

- Name
- Location
- Income level

How is Invoca able to tie phone calls back to marketing efforts that drove them?

Invoca enables marketers to tie customers' digital journeys to phone calls using online data collection and unique, trackable phone numbers. Call tracking and analytics are made possible with the Invoca website tag. The Invoca tag is a snippet of JavaScript code placed on your website that automatically replaces standard, static phone numbers with trackable, dynamic phone numbers that are unique to each site visitor. These dynamic numbers act as a unique identifier for an individual's website session.

Beyond managing dynamic phone numbers, the Invoca tag also captures other data, such as UTM source, medium, paid search keyword, and Google ClickID. Plus, other customer journey data, like page visitation and unique customer identifiers are gathered from the browser cookie.

When a person calls an Invoca-supplied phone number, the call is routed through the Invoca platform to your call center, local agent, or any other destination. This allows Invoca to aggregate the digital data and tie the callers' previous activity to the phone call. This happens nearly instantaneously with no interruption to the caller experience. With this data, you can understand exactly which marketing tactics are driving your high-value phone calls.

When a person calls an Invoca-supplied phone number, the call is routed through the Invoca platform to your existing call center, local agent, or any other destination.

What can we do with this data?

With the granular call attribution data Invoca provides, you can optimize your marketing campaigns to drive more high-value calls, enhance the entire customer journey, and personalize the caller experience to increase conversion rates. Here's how it works.

Optimize your marketing

Invoca not only gives you visibility into the campaigns that are driving your calls, but provides a full picture of the outcome of every call. The result? You can make smarter campaign optimization decisions—like what keywords you should be spending more money on—to drive more revenue-generating calls and more efficient campaigns. With Signal AI, you can take action on call outcomes in real time.

Get granular, keyword-level call attribution to optimize your paid search campaigns.

Enhance the customer journey

The customer journey doesn't end after a phone call. With Invoca, you can use outcome data gathered from phone calls to enhance your other marketing tools and expand your reach to likely buyers. By pushing call analytics into media platforms like Google Ads and Facebook, or DMPs like Adobe Audience Manager, marketers can create targetable audience segments to orchestrate the next action, or build lookalike audiences to reach new customers.

Personalize the caller experience

With Invoca, you can personalize the caller experience to increase conversion rates, enhance the customer experience, and ensure that call center agents are focusing on revenue-driving calls. Our customers have seen 10x increases in conversion rates by qualifying and routing calls based on factors like geolocation, time of call, product interest, shopping cart activity, and more.

Doesn't showing a unique phone number to every website visitor require an enormous amount of phone numbers?

No. Dynamic phone numbers are "recycled" in a predetermined amount of time after someone visits your site and does not call. Rather than assigning one number to only one visitor forever, Invoca allows you to create an attribution window that make sense for your business. For example, if you know that customers typically call within 30 minutes of visiting your page, you can safely reuse that uncalled number after 30 minutes, exposing it to a new site visitor. This makes 1:1 call tracking feasible and keeps costs down. Learn more about **how dynamic phone numbers work in this video.**

Isn't call tracking for the call center? Why should marketers care?

The kind of call tracking that marketers need is different than what you will find in the call center. Call centers typically focus on call quality metrics like call duration, hold times, call counts, etc. The data they collect is typically used to reduce call center costs, not to drive additional revenue. They may track conversion data, but marketing usually has little if any access to this data and no way to attribute it to campaigns that may have driven the calls in the first place.

Invoca is specifically designed for marketers. It allows you to connect phone calls to advertising so you know what ad drove what call and what the results of that call were—AKA call attribution—in real time. For example, if you call a business that's using Invoca, they can tell what ads, web pages, or keywords helped drive you to call. And once you are on the phone, Invoca analyzes the language used in the call to tell if you bought anything, got a quote, made an appointment — or whatever your business considers a conversion. With this data, marketers can make their ads, web pages, social ads, and other advertising mediums more effective to acquire more high-value customers at a lower cost.

Okay, but the call center won't want to rip and replace what they're using for tracking calls.

If your call center has its own solution in place for counting calls, monitoring call quality, and measuring all the KPIs that are important to the department, then they don't have to make any changes when the marketing team adopts Invoca. It has no impact on the existing telephony system, and any tracking platforms that they are using can remain in place. If zero disruption to your call center operations is what's desired, zero disruption is what you get. Marketing gets all of the call data that it needs for attribution and optimization, and the call center keeps doing its thing. In fact, if the call center is currently supplying marketing with conversion data and call outcome classification, Invoca can relieve the call center of gathering and processing call data for marketing, allowing them to use their resources more efficiently, while you get the data you need in real time instead of waiting for the call center to batch and deliver it.

If the call center would like to use Invoca to improve their operations, however, they can still do so with no disruption or changes to their current systems. Invoca can help the call center save money by uncovering inefficiencies, reducing unwanted call volume, blocking spam calls, and even reduce telecom costs by routing calls via Invoca session initiation protocol (SIP).

Where do calls placed to Invoca numbers go?

When a customer calls an Invoca number, it is routed to the existing destination phone number or call center of your choice. You'll still use your existing phone system, and inbound calls will still be routed to them in the same way as they are without Invoca. Our dynamic phone numbers are simply a proxy that appears on your website to enable the capture of the rich, session-level data, just like you get for clicks. If desired, you can also use Invoca to route your calls more effectively, getting customers to the right place faster. This can reduce hold times and transfers, greatly improving the call experience. All without "ripping and replacing" any current infrastructure.

Invoca multi-destination routing also makes it easy for businesses that drive calls to many regional locations or call centers to get granular call data while ensuring that calls are seamlessly connected to the right place, whether it's a local agent, dealer, franchisee, or regional call center. By combining digital data captured by Invoca with customer and product databases, marketers can intelligently route calls to the most appropriate place. Instead of manually mapping phone numbers to landing pages, Invoca automatically detects and replaces all the numbers on your web pages with dynamic toll-free or local numbers, greatly reducing the effort required to run multi-location advertising campaigns.
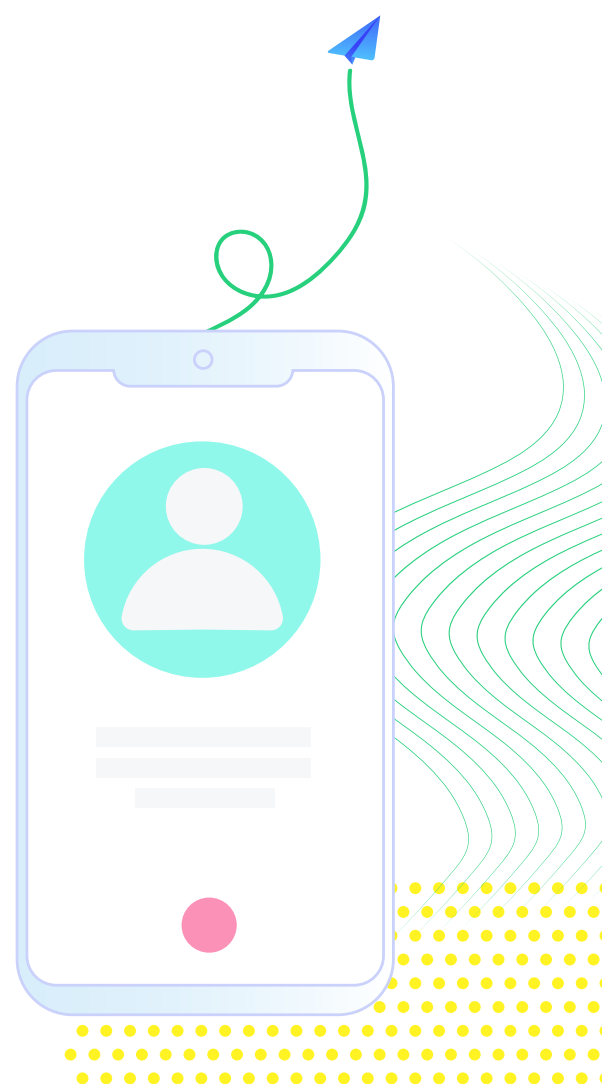
How can I access Invoca data?

When you add Invoca to your martech stack, you aren't just adding another dashboard. Invoca data is passed in real time to whatever platforms you already live in every day through native integrations with tools like Google Ads, Google Analytics, Salesforce, Adobe Experience Cloud, and many others. No exporting spreadsheets or messing with pivot tables required. You can also access and view call data directly in Invoca's easy-to-use dashboards and reports.

What about security and privacy?

Invoca provides enterprise-grade compliance and data privacy with all call analytics features enabled. Other call tracking platforms may require you to turn off call recording features to meet certain compliance standards like PCI DSS. Invoca features:

99.99% Call & Platform Uptime

HIPAA Compliant

SOC 2 Type II Compliant

PCI DSS Compliant
with all features enabled

GDPR Compliant

SAML Supports **two-factor authentication and SAML**

Automatic redaction of personal information from call recordings

How does Invoca work with paid search?

Paid search optimization is one of the primary use cases for Invoca. For marketers who manage paid search strategy in Google Ads, Invoca's Offline Conversions integration provides closed-loop attribution for phone calls and conversions driven by your paid search and display spend.

Invoca integrates with Google Ads to provide closed-loop attribution for conversions that happen on the phone.

Invoca accomplishes this by capturing data about the digital journey, like marketing campaign and ad creative, and ties that data to phone calls. When a call is placed, Invoca captures identifiers like the Google Click ID, enabling you to report individual call events and conversions to Google Ads in real time. Our integration offers the most reliable and precise method to get keyword visibility for mobile call extensions and calls from your landing pages.

Through this integration, Invoca is able to not only tie the individual call but also the actual call outcomes, such as mentioning a product or classifying a caller as a prospect.

Since call conversions are reported in Google Ads in much the same way as online conversions, you can treat this call data exactly how you would typically treat digital data.

- See which Ad Groups, ads, and keywords are driving each type of call outcome
- Measure revenue from calls to calculate return on ad spend
- Use conversions to optimize keyword spend using automated bidding rules

By providing keyword-level attribution and conversion reporting in real-time, Invoca helps you attribute calls to paid search and display budgets, and use call conversions to optimize your spend to drive more revenue. Lean more about how Invoca works with **Google Ads in this video.**

How does this work with web analytics?

By integrating Invoca call data with web analytics tools like Google Analytics, marketers can get a holistic view of keyword or campaign performance, identify top conversion paths, understand reverse goal paths, and create call-based segments.

Invoca captures data about the customer journey, like marketing campaign and ad creative, and ties that data to phone calls. By capturing key identifiers like Google Client ID, you can report individual call events and conversions to Google Analytics in real time. By tying phone calls to website activity, marketers can understand how customers are engaging with their website and use that call activity to help create a seamless customer journey. Learn more about how Invoca works with **Google Analytics in this video.**

Does this work with Facebook?

Yes, Invoca has a native integration with Facebook and Instagram. The Facebook integration gives you:

- **Granular attribution:** Get actionable insight into the campaigns, ad sets, and ads driving customers to call and convert offline. You'll see this side-by-side click data for a complete online and offline view of your ad performance.

- **Greater insight into target audiences:** Use Invoca data to understand which target Facebook audiences have the highest propensity to call.

- **Call data inside Facebook reporting:** View Invoca call data within the standard Facebook reporting tools to optimize Facebook audience targeting and ad spend.

- **Data to create high-performing custom audiences:** Invoca's call data allows you to segment your callers and automatically sync them to Facebook in real time, where you can use them as custom audiences.

How does Invoca work with our CRM?

Invoca sends call data to CRMs like Salesforce Sales Cloud in real time for automated closed-loop reporting. You can also push opportunity stage information from Salesforce to Invoca for reporting and analysis, or to build out marketing audiences in other martech platforms. Every Salesforce Sales Cloud instance is unique, so our integration offers flexibility to meet your configuration and use case. Your Invoca team will offer guidance on available options. Using the Salesforce integration and a new lead as an example, here's how it works:

When a new lead calls, Invoca captures and sends call data such as lead source, demographic information, and call outcomes to Salesforce, then associates the data to a contact or lead. If there isn't a matching contact or lead, a new lead can be automatically created.
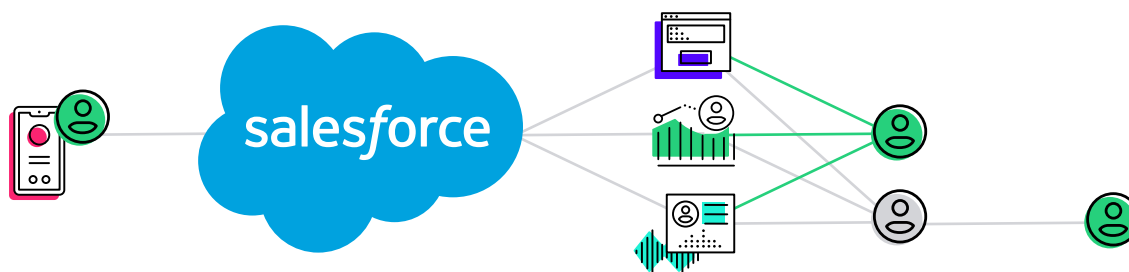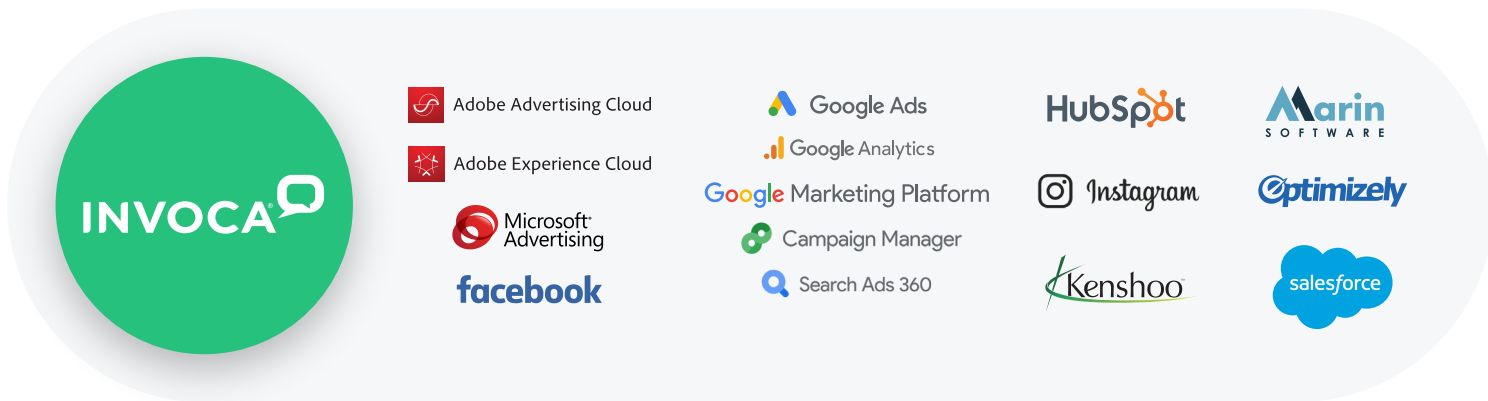

The lead record has the standard information you would expect to see, along with the Invoca call log. The call log is a custom object that is made possible with the Invoca-Salesforce integration. First, you'll see caller details like the lead name, where they're calling from, and an actual recording of the call. And you'll also see critical information like when the call came in, whether it's a repeat caller, and what marketing sources drove that call. Invoca also brings in details about the paid search campaign that drove this call. You'll also see additional demographic data that you can use to append to the call. This helps build a more robust lead profile without adding more work to your sales reps.

All of this data is captured through the Invoca platform and piped into Salesforce so you can have one central source of truth. **Watch this video to see how it works.**

INVOCA The Call Tracking Study Guide for Marketers
Call Tracking 501 – How to Get Buy-In for Invoca in Your Organization

59

What platforms do you integrate with?

Invoca's native integrations assure that you can get your data where you want it to be without massive amounts of customization and IT intervention. Other platforms may use third-party web automation apps to make their "integrations" work. Invoca offers fully-supported integrations with these popular platforms:

INVOCA

Adobe Advertising Cloud

Adobe Experience Cloud

Microsoft Advertising

facebook

Google Ads

Google Analytics

Google Marketing Platform

Campaign Manager

Search Ads 360

HubSpot

Instagram

Kenshoo

Marin SOFTWARE

Optimizely

salesforce

Custom integrations

Custom integrations let you connect your Invoca account to any system, including your own internal tools. Using custom webhooks, data deliveries, or Invoca APIs, you can build your own integrations to export data from your Invoca account.

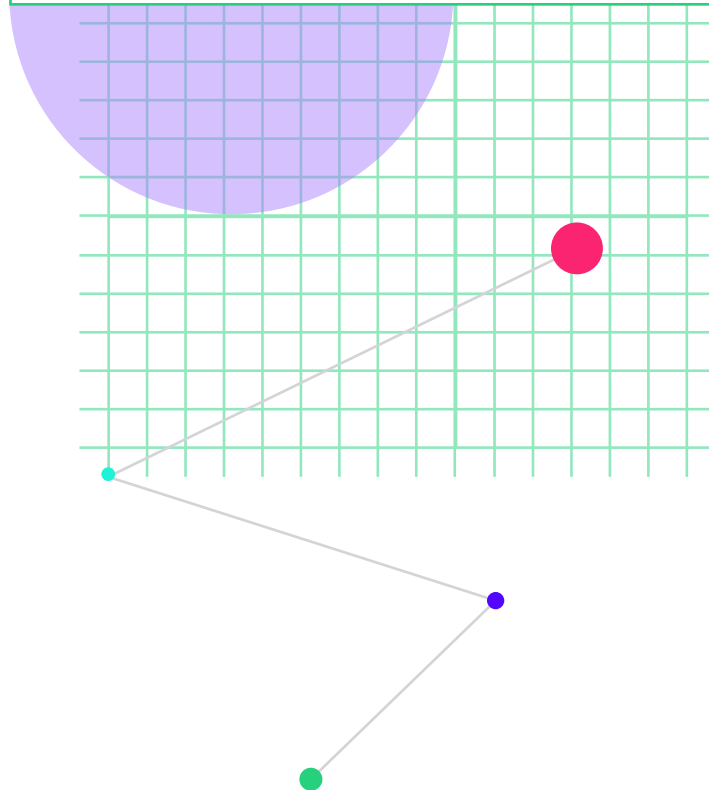You can view our full list of integrations here.

Do we have access to call recordings?

Yes, you have access to call recordings through Invoca's reporting suite or in your CRM through an API. Call recording access is limited to certain administrative users. Additionally, for PCI compliance, call recordings are automatically redacted to remove access to sensitive information. Once this information is redacted, it is not available to anyone, including Invoca.

How is Invoca different than other marketing call tracking solutions?

Not all call tracking and analytics platforms are created equal. Invoca provides the most advanced and highly automated call analytics platform using AI-powered speech analytics that has the scalability and flexibility that sophisticated marketers require. Here's what makes it different:

Signal AI

Some other call analytics platforms claim to be "AI-powered" when all they are doing is using off-the-shelf technology to transcribe phone calls. Many even still require you to listen to phone calls or read transcripts and manually assign call outcomes (e.g. sale/no sale) to get attribution. Others use basic keyword spotting technology that may be inaccurate or not work for your specific use case. Invoca Signal AI is different because it keeps learning. Once your call outcome signals are identified, Signal AI continues to analyze your calls and allows you to further refine your call outcome classification and improve the accuracy of the predictions. Our performance scoring tool also makes the accuracy of our predictive models clear and provides benchmarks to improve them. We offer pre-trained AI models for fast deployment in common applications and custom predictive models that can be trained using your business's call recordings to establish conversion outcomes tailored to your unique needs.
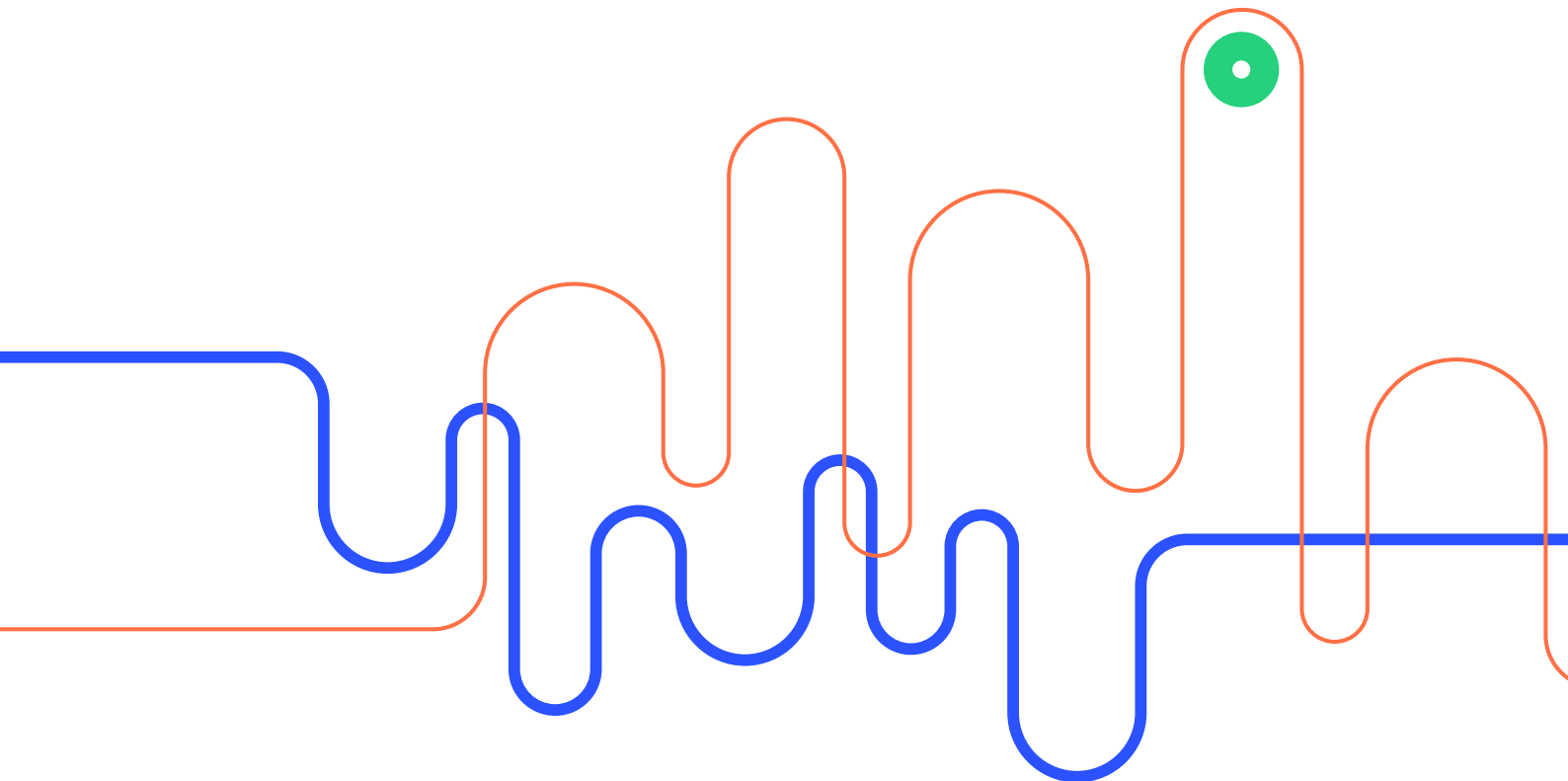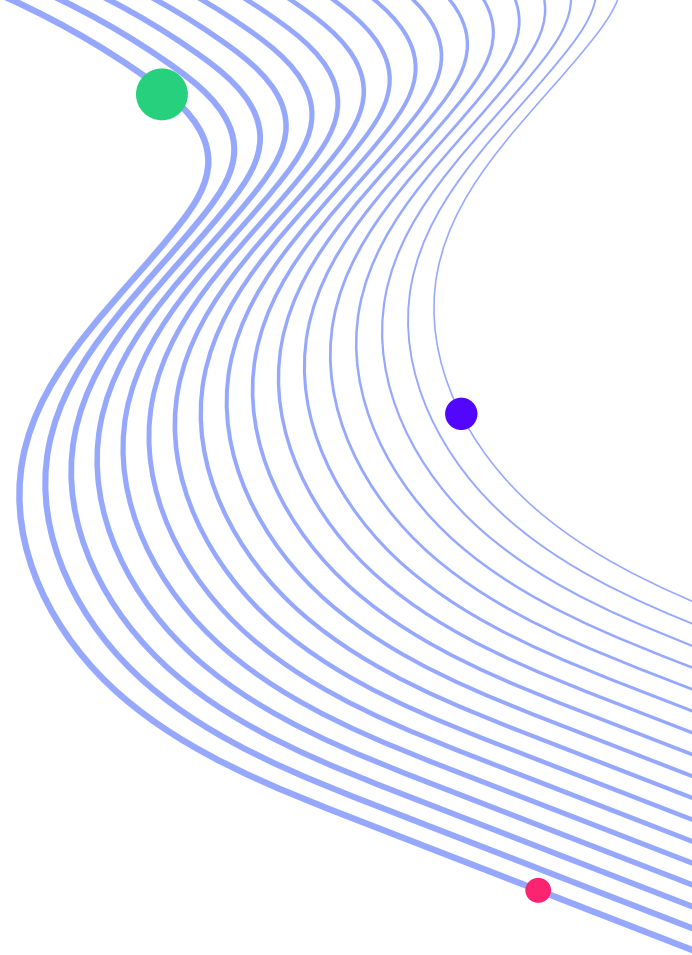
Signal Discovery

Signal Discovery is the latest enhancement to our Signal AI conversational analytics suite. It's a first-of-its-kind tool that analyzes call recordings and presents marketers with a map of their contact center conversations, with calls visually arranged by topic. With the ability to explore this data in a user-friendly interface, conversations no longer represent a black box of inaccessible first-party data; insights are easily identified and readily available.

Signal Discovery allows you to uncover new insights about your customers using AI.

Powered by unsupervised machine learning algorithms, Signal Discovery analyzes calls to automatically group conversational topics based on similarities in speech patterns. Topics may include subjects like specific product inquiries, existing customer plan upgrades, or new customer purchases. These topic groupings are then presented in an interactive map that can be explored and analyzed within the Invoca cloud platform. Once enabled, new inbound calls will be automatically assigned topics in real-time based on the content of the conversation. This data can then be pushed into digital marketing platforms like Google and Facebook for attribution and audience creation, or into analytics and business intelligence tools for further analysis.

Signal Discovery
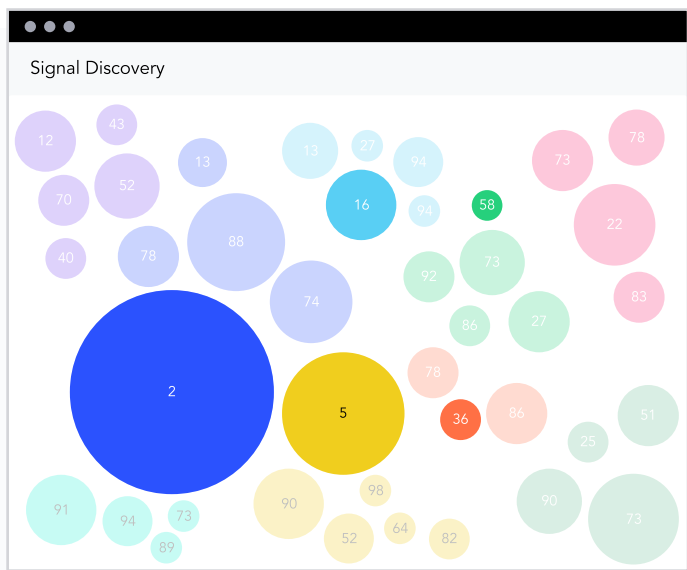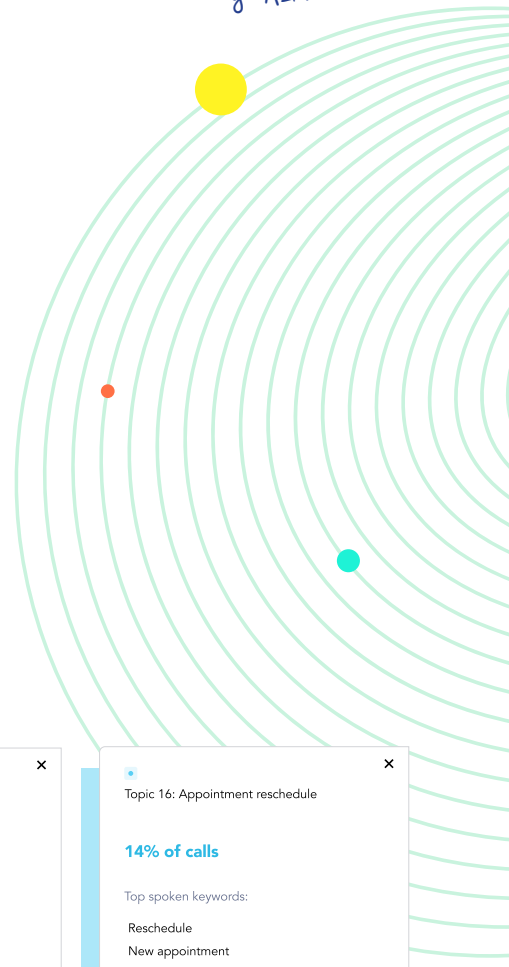
Topic 2: New customer installation appointment

56% of calls

Top spoken keywords:

Installation
Activation
Technician
Arrival window
Complete
Delivery

Topic 16: Appointment reschedule

14% of calls

Top spoken keywords:

Reschedule
New appointment
Morning
Afternoon
Reminder
Reassign

Topic 5: Existing customer service appointment

33% of calls

Top spoken keywords:

Down
Disconnected
Reset
Unplug
Blinking
Modem

Topic 36: Price match a competitor

9% of calls

Top spoken keywords:

Lower
Price
Better
Match
Costs less
Best price

Topic 58: Service cancelation

6% of calls

Top spoken keywords:

Cancel
Disconnect
Moving
Reduce
Expensive
Off

How does pricing work?

Invoca is priced like many software-as-a-service (SaaS) platforms, with annual
license agreement with fees paid on a monthly basis.

There are four primary components to Invoca pricing:

1. Platform license

Platform license, determined by:

· Platform edition and features
· Annual call volume
· Platform add-ons such as Signal AI,
redaction, Enhanced Caller Profiles, and
any integrations not included in the
selected platform edition

2. Usage

Usage, determined by annual inbound
call minutes and monthly phone numbers
(above what's included in the platform
edition)

3. Support plan & service availability

Support plan & service availability,
determined by the selected support plan.

4. Non-recurring one-time setup fees

One-time setup fees, determined by
platform edition and custom integrations

Third-Party Validation

It is important to everyone in your organization that you are choosing a stable, industry-leading call tracking vendor with a solid track record. Invoca has the third-party validation to back this up.

FORRESTER®

The Forrester New Wave™: AI-Fueled Speech Analytics Solutions, Q2 2018

Invoca was named a Strong Performer in this report by Forrester Research. The New Wave report evaluates vendors based on their current offering, strategy, and market presence using 10 criteria. Invoca earned a differentiated rating in the real-time speech analytics, business insights, and product roadmap criteria, with Forrester citing that "Invoca is advancing state-of-the-art call classification." The report also included customer feedback that "Invoca has done an excellent job developing and innovating [its] platform."

Download Report

G2 Crowd Enterprise Grid for Call Tracking

Invoca is the top-scoring Leader in the G2 Crowd Summer 2019 Enterprise Grid® Report for Inbound Call Tracking Software. Invoca received the highest overall score in this report, beating out six other vendors in the call tracking and analytics space. Ranking highly for customer satisfaction and market presence, Invoca's position in this Grid underscores its focus on product innovation and customer success.

G2 Crowd rates products from the Inbound Call Tracking category algorithmically based on data sourced from product reviews shared on their platform, and data aggregated from online sources and social networks. 93 percent of reviewers give Invoca 4 or 5 stars and nearly 90 percent would recommend the platform to others.

Download Report

Leader
Enterprise
SUMMER 2019

WINNER
Best Call Analytics Platform

MAR TECH AWARDS
2019   ClickZ
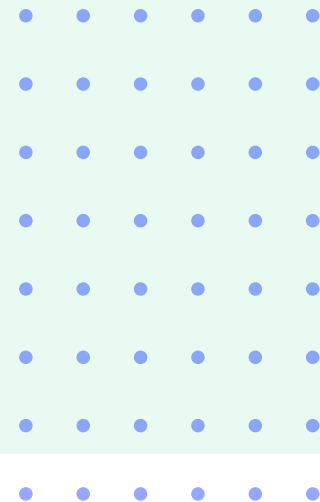
Best Call Analytics Platform - 2019 Marketing Technology Awards

Invoca was named the Best Call Analytics Platform in the Marketing Technology Awards, which is organized by ClickZ and Search Engine Watch. Companies were judged by customers and a host of influential leaders in marketing tech, based on ease of use, customer service, value for money, onboarding, integrations, and innovation.

Learn More

2019 Artificial Intelligence Excellence Award - Business Intelligence Group

Invoca was awarded a 2019 Artificial Intelligence Excellence Award from Business Intelligence Group for its Signal AI technology. **Learn More**

Hot Vendor in Conversational Intelligence - Aragon Research

Invoca was named a "Hot Vendor in Conversational Intelligence for 2019" by Aragon Research. The report identifies solutions from the emerging conversational intelligence market that enable organizations to predict customer or prospect behavior by using AI-based voice analytics.

Learn More

Best AI-based Solution for Marketing - AI Breakthrough Awards

Invoca's Signal AI platform won the "Best AI-based Solution for Marketing" in the 2018 AI Breakthrough Awards. Other winners included Google, Qualcomm, and NVIDIA, plus an impressive list of top companies and startups in the artificial intelligence market.

Learn More

CB Insights Pioneer in Artificial Intelligence

Invoca is a recipient of the CB Insights AI 100 award, a select group of emerging private companies working on groundbreaking artificial intelligence technology.

Learn More

Backed by Tier-1 Investors

Invoca's stability and success are reflected by the investors that have backed the company with $116 million in funding, including Accel, Upfront Ventures, H.I.G. Growth Partners, Morgan Stanley, and Salesforce Ventures.

Invoca Customer Testimonials

Nothing speaks louder about the value of Invoca call tracking and analytics than the success of our customers.

Healthcare
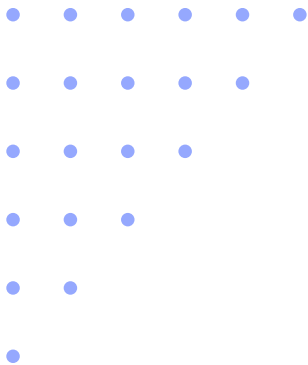
University Hospitals

University Hospitals

**Increased in appointments scheduled by 580% with Invoca**

"Implementing Invoca at University Hospitals was one of the biggest wins of our department in 2018, and it gave us the data needed to significantly improve performance."

dispatch HEALTH

Dispatch Health

Within 90 days of implementing Invoca, Dispatch Health was able to **convert 50% more consumers.**

Communications
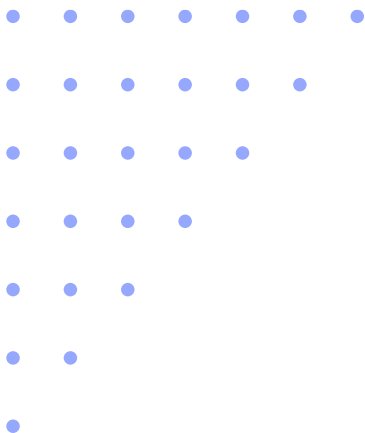
dish

DISH Networks

"With Invoca we've **transformed an online conversion experience with a throughput of less than 5% into a phone call that closes in the high 60% range.**"

Frontier COMMUNICATIONS

Frontier Communications

After six months of using Invoca, **campaign response rates improved by 66%, while revenue increased by 50%. In addition, cost per sale went down by 58%**

Agency & Performance Marketing

Clearlink

Clearlink

"With Invoca, our agents no longer have to start from scratch in customer conversations. They now know what a customer was looking at on the web before they actually called in. That has helped us to reduce our call handling time by 40%."

VISIQUA

Visiqua

"In a 90-day period, we were able to use these optimizations to **reduce the client's cost per acquisition by over 80 percent.**"

## Financial Services

SunTrust

SunTrust Bank

300% increase in call duration, 50% average reduction in cost per conversion. "With Invoca we've been able to evolve our digital marketing programs while maintaining the personal connection of a conversation, which we now know is a critical touch point in the SunTrust customer journey."

WEITZ & LUXENBERG

Weitz & Luxenberg

Decreased cost per retainer by 28%. "No matter where our ad is, with Invoca we get the attribution. It's no longer a gut-check—now I have the proof, I know whether or not the ad buy is working and if it's making the right people call."

The industry's must-attend gathering of forward-thinking marketing leaders who understand the value of phone calls in today's customer journey.
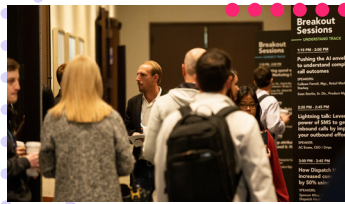
INVOCA
SUMMIT

2019 **22-24** Oct
SANTA BARBARA
CALIFORNIA

/Why attend?

This isn't your typical marketing conference. Invoca Summit delivers innovative, world-class learning combined with intimate networking just steps from the beach in sunny Santa Barbara.

Register now at:
invoca.com/summit