



The Ultimate Guide to Conversation Intelligence

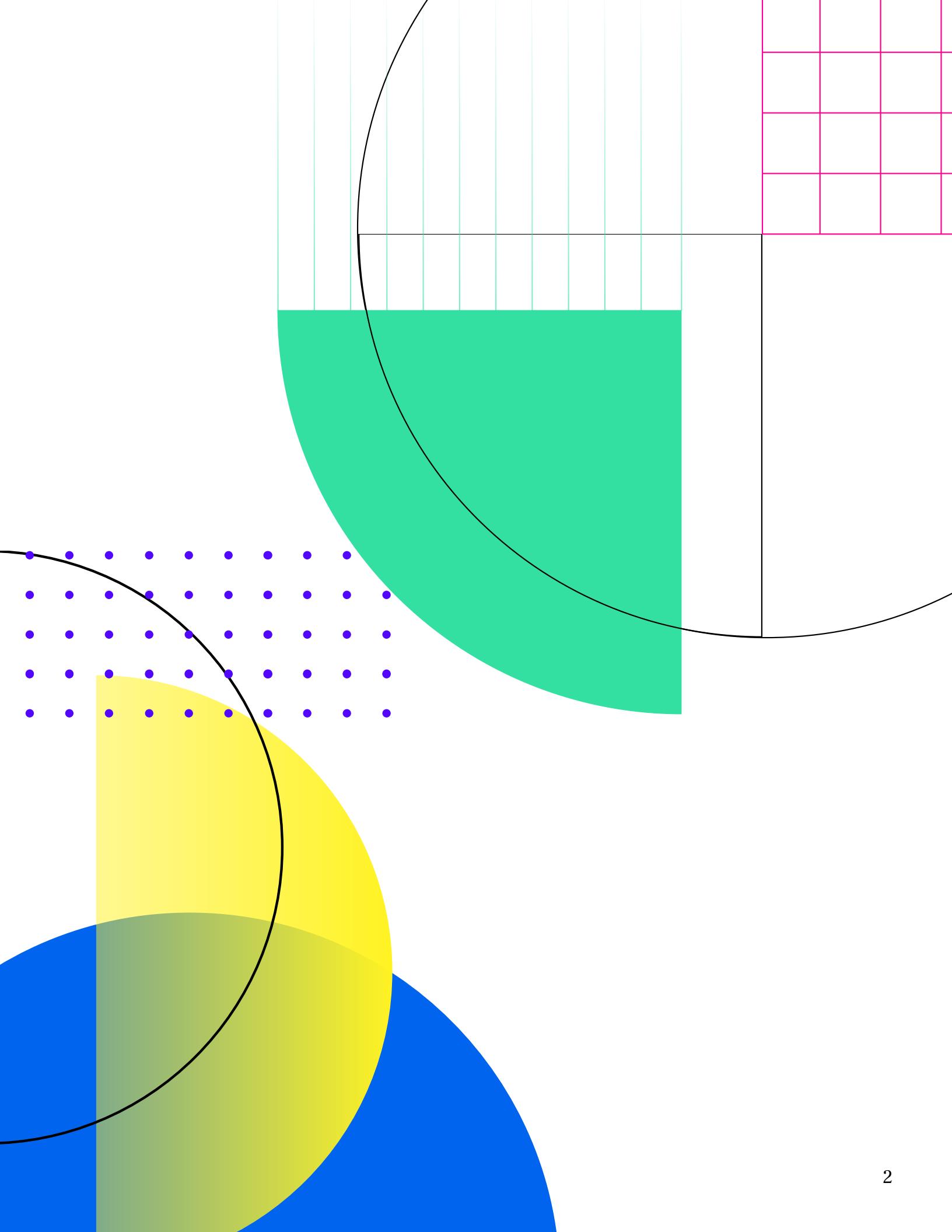
for Marketers

2nd Edition

New Section!

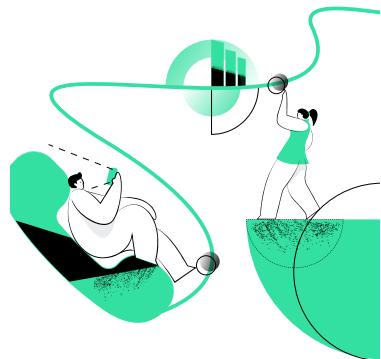
Using Conversation Intelligence
to Optimize Google Ads
Performance





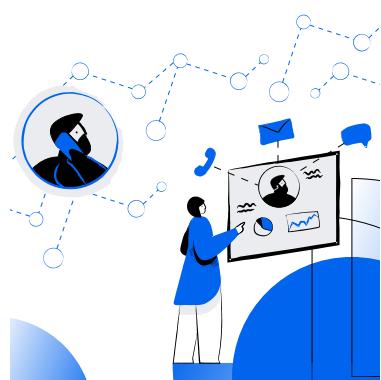
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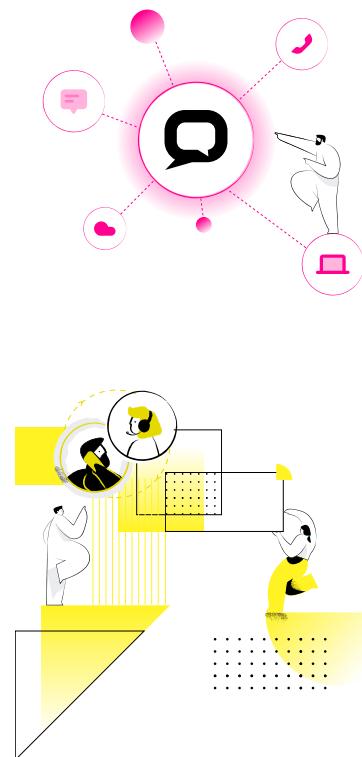


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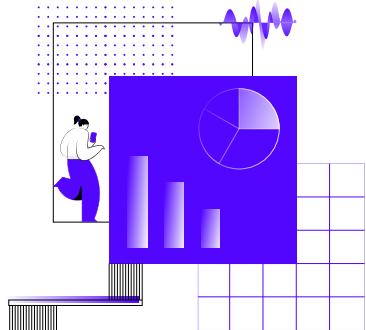
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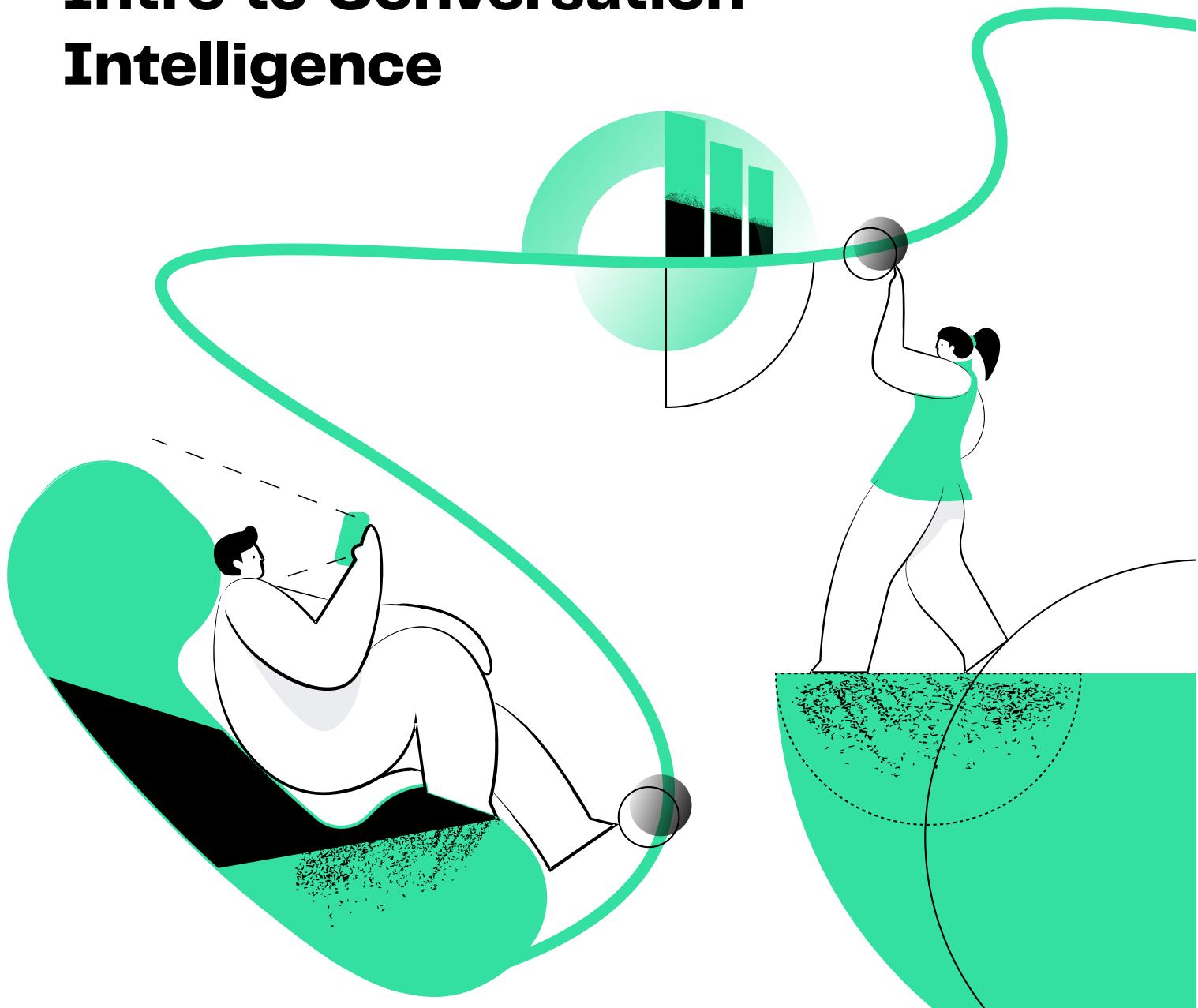
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1.0: Intro to Conversation Intelligence



In this section, we will introduce you to the guiding concepts of conversation intelligence, call tracking, and conversational analytics. 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 will be prepared to understand more advanced conversation intelligence concepts and features.

Welcome to the 2nd Edition of The Call Tracking Study Guide!



Unlike most new textbook editions, we didn't just move the pages around, change a few pictures, and increase the price of the 2nd Edition of The Call Tracking Study Guide for Marketers. First, it's still free! Second, we've added a new section that shows you how to maximize your paid media budget and reduce your acquisition costs by using Invoca with Google Ads (see the new section 4.0). Third, we changed the title!

The Call Tracking Study Guide for Marketers is now The Ultimate Guide to Conversation Intelligence. This is not only to recognize the evolution of Invoca from call tracking to an active conversation intelligence solution, but it was a data-based decision, as we found the "Ultimate Guide" title to have higher conversion rates when tested in display and syndication than "Study Guide." You know how we love our data.

This latest version has also been updated with new Invoca features like Signal Discovery, a deeper dive into our integrations, and of course, our designers would be remiss if we didn't point out the updated look!

And it's now the Award-Winning The Ultimate Guide to Conversation Intelligence, having garnered recognition in B2BMX's Killer Content Awards and PR Daily's Content Marketing Awards. Hold up, let me grab my horn — TOOT TOOT! There we go.

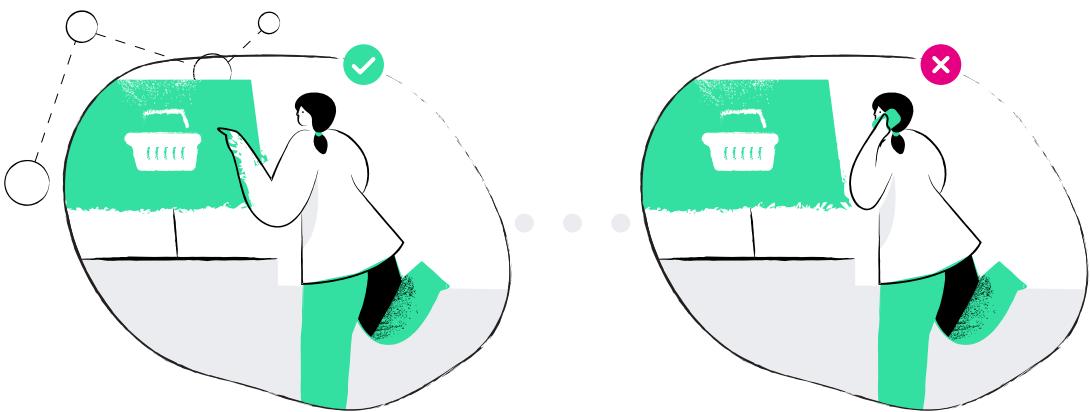
On a more somber note, we have all entered a new era of marketing in 2020. A worldwide pandemic and the resulting economic impacts have dealt all of us a massive blow both personally and professionally. This has shifted the focus of many marketers from expanding programs to making sure that their marketing is not only more efficient but more responsive to rapidly changing customer needs and behavior. Many of the updates we have made to this edition reflect this new reality as well.

As always, The Ultimate Guide to Conversation Intelligence is the most comprehensive text available to help you learn how it can help make you a better marketer and improve the performance of all of your efforts.

Are you ready to learn everything about conversation intelligence? Great, let's go!

Why Marketers Need Conversation Intelligence

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 about whether or not their online campaigns are driving "offline" phone conversations and the motivation of their callers.



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 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 a mess.”

Sam Schwendiman,
Marketing Operations
Manager, CHG Healthcare

It's like the "half-the-budget wasted but I don't know which half" 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.

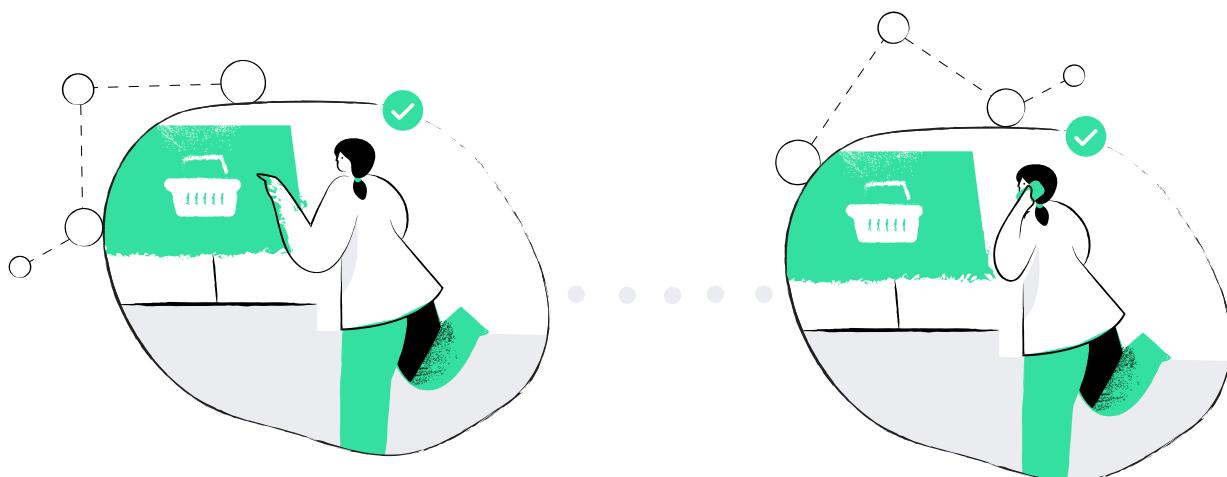
Call tracking and conversational analytics platforms, which were once the domain of the call center and siloed from marketing, have evolved into solutions like Invoca's active conversation intelligence, which enables companies to understand and immediately act on the information consumers share via conversations and turn it into automated action.

How Invoca Works

Like a lot of SaaS technology, conversation intelligence 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.



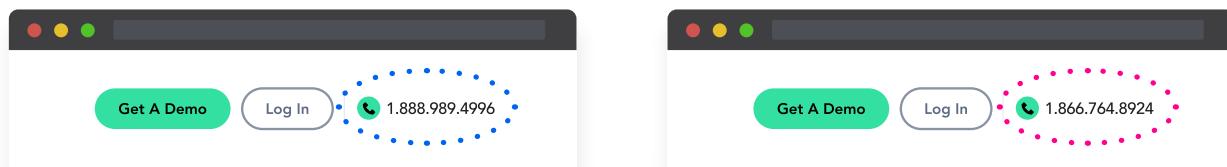
For example, if you call a business that is using Invoca, they can tell what ads, web pages, or keywords helped drive you to call. And once you are on the phone, Invoca can analyze the language used in the call to tell if you bought anything, got a quote, made an appointment — or what we like to call 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. And by getting insight into what makes people call, you can also optimize your digital experience to get more people to convert online without calling.

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



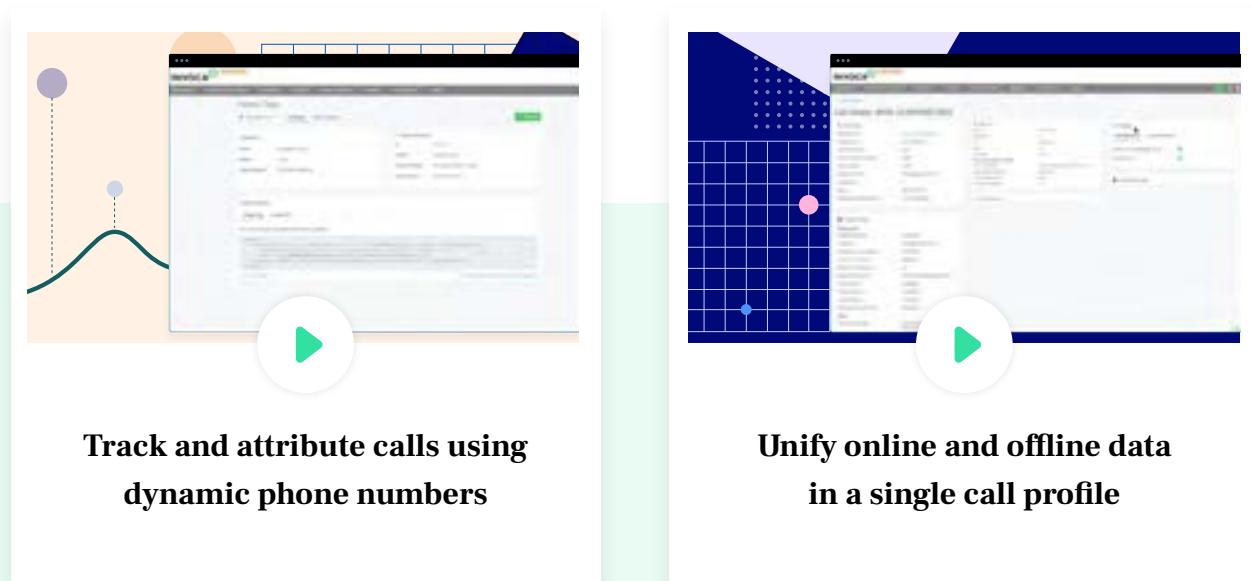
You probably noticed that there is a different number on each of your devices. If you call this number it goes to the exact same place. But the reason you are both seeing different numbers is that Invoca places dynamic numbers on the page, while the related data are stored on Invoca's servers and the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

Invoca now stores data on an external server to reduce reliance on browser cookies and reduce the limitations of browser-level cookie-blocking.

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/



Track and attribute calls using dynamic phone numbers

Unify online and offline data in a single call profile

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: From Call Tracking to Conversation Intelligence

Back in the day, call tracking solutions were primarily used to monitor call quality, call volume, and to collect basic customer information for the call center. As digital marketers who spend their time and budgets driving sales 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 teams, while others strive to meet the needs of small or local businesses, and still others have found their niche as basic low-buck solutions.

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



Basic Call Tracking vs. Active Conversation Intelligence

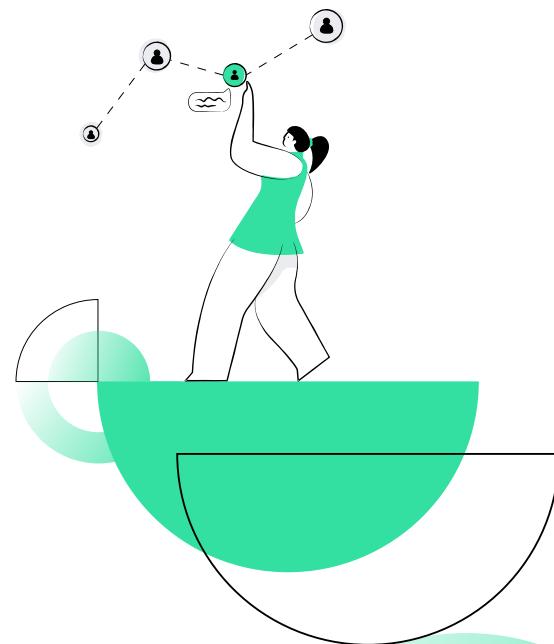
Basic call tracking solutions can provide marketers with valuable call data like call volume, call times and duration, caller information, and some level of campaign attribution. However, basic call tracking solutions have some major limitations for marketers who want to use call data to inform their 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
- Cannot provide adequate data to automate next-step marketing processes like retargeting and suppression

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

Imagine a website analytics solution that 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 Active Conversation Intelligence Bridges the Online-Offline Data Gap

Advanced conversation intelligence solutions like Invoca pick up where call tracking left off by unearthing rich data about the call, attributing the call to the entire digital journey, and providing the data required to automate actions after the call, like retargeting and suppression, keyword bidding optimization, digital experience analysis, and more.

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 and Signal Discovery to derive insight around call drivers, behaviors, and outcomes
4. **Activate** this intelligence across your tech stack for automation, analysis, optimization, personalization, and more

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

Calls can be attributed to search, social, display ads, emails, landing pages. Even calls from offline ads like outdoor and direct mail can be tracked in Invoca.

What You Can Do With It

Armed with powerful conversation data, digital teams can measure and multiply their performance, optimize campaigns, discover customer motivations, and improve the buying experience. These use cases will be covered throughout the guide.

Test Your Knowledge – Section 1.0

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:

Optimize ad campaigns Automate retargeting
 Track calls from direct mail All of the above

Question 5:

Basic call tracking can trigger ad retargeting

True False

Question 6:

All call tracking platforms use conversational analytics.

True False

Test Your Knowledge – Section 1.0 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. Calls can be attributed to most types of digital ads, including search and display.

Question 3:

Invoca can tell you about call outcomes.

True

Question 4:

Call tracking can help you:

All of the above

Question 5:

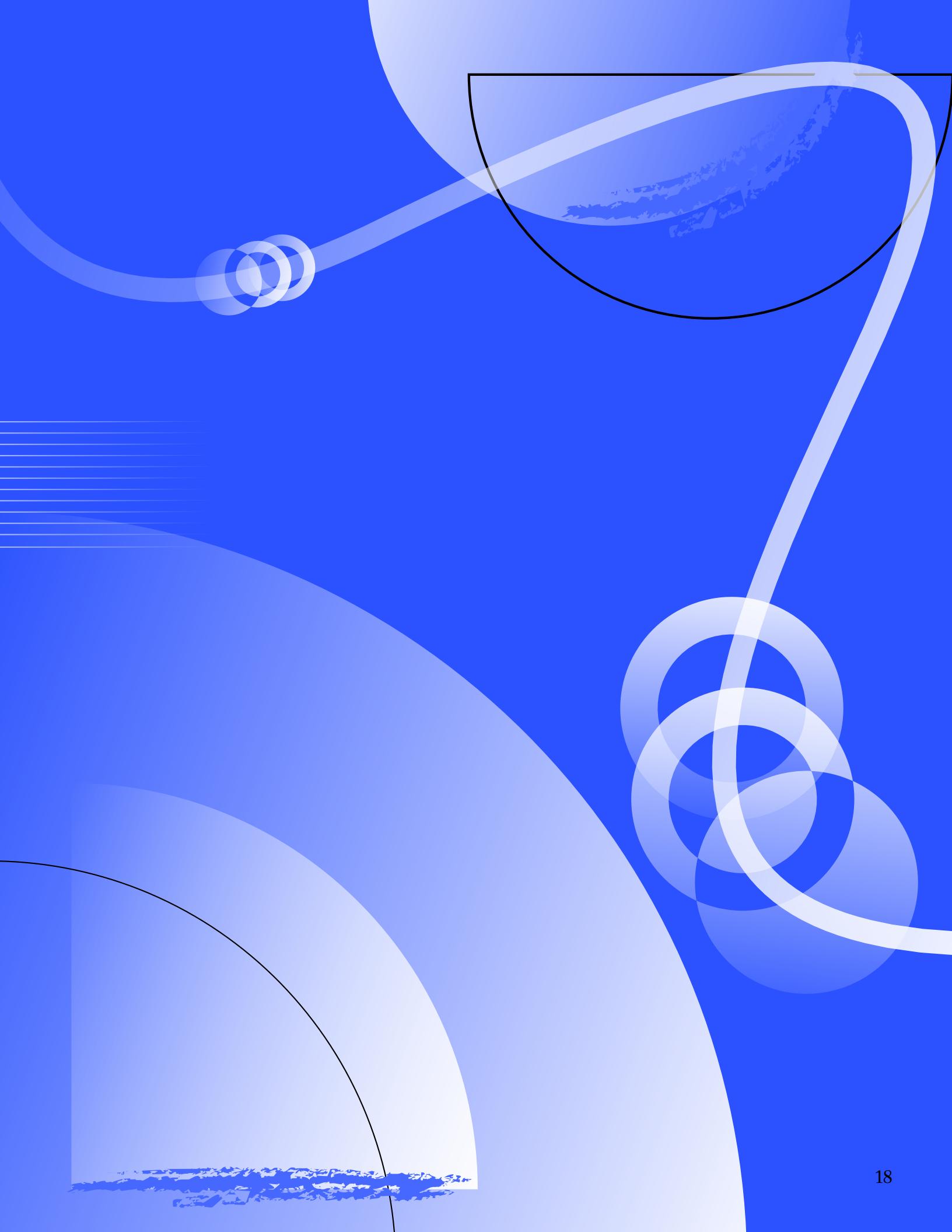
Basic call tracking can trigger ad retargeting

False. Basic call tracking platforms cannot help with marketing automation.

Question 6:

All call tracking platforms use conversational analytics.

False. Some call tracking platforms only use keyword spotting or conversion proxies like call duration or keypresses to classify calls. Conversational analytics uses natural language processing and AI to analyze speech and classify call outcomes.



2.0: Advanced 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 phone conversations 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 Signal Discovery conversational analytics, how Invoca Signal AI works, how it's implemented, and how Invoca is integrated 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 looks like today:

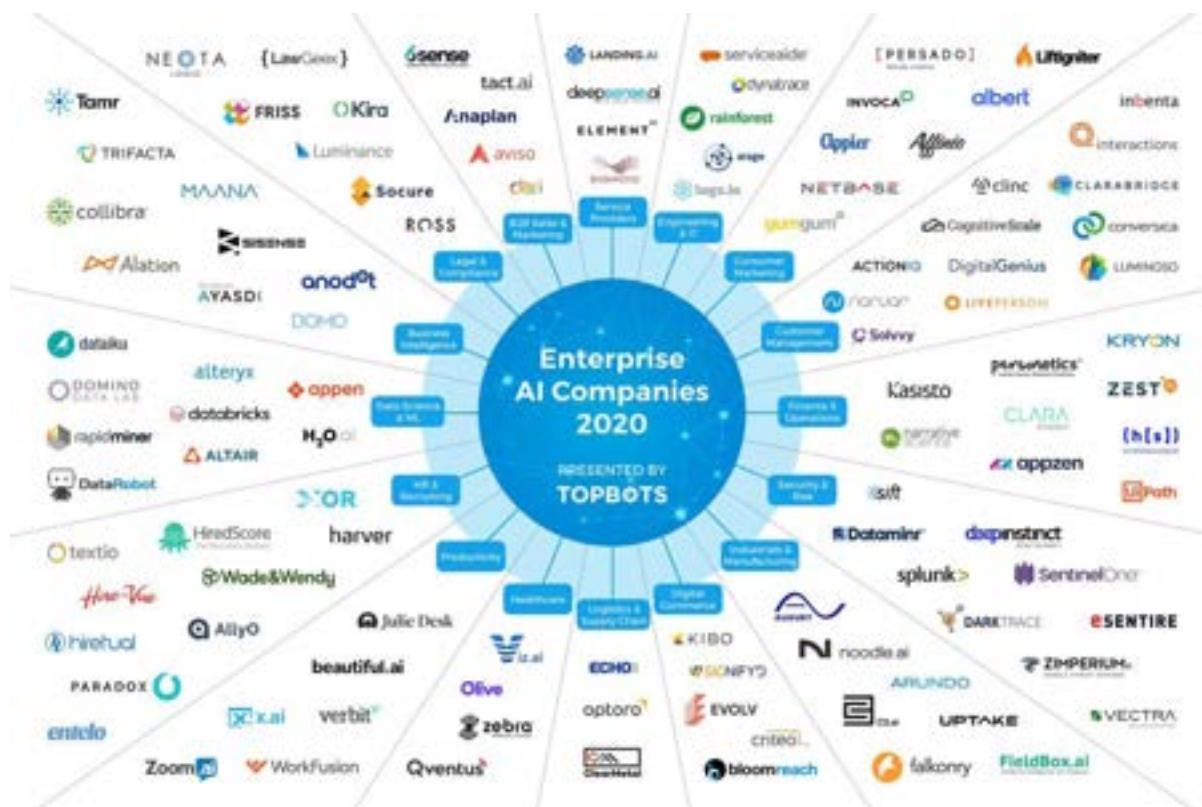


Image: TOPBOTS

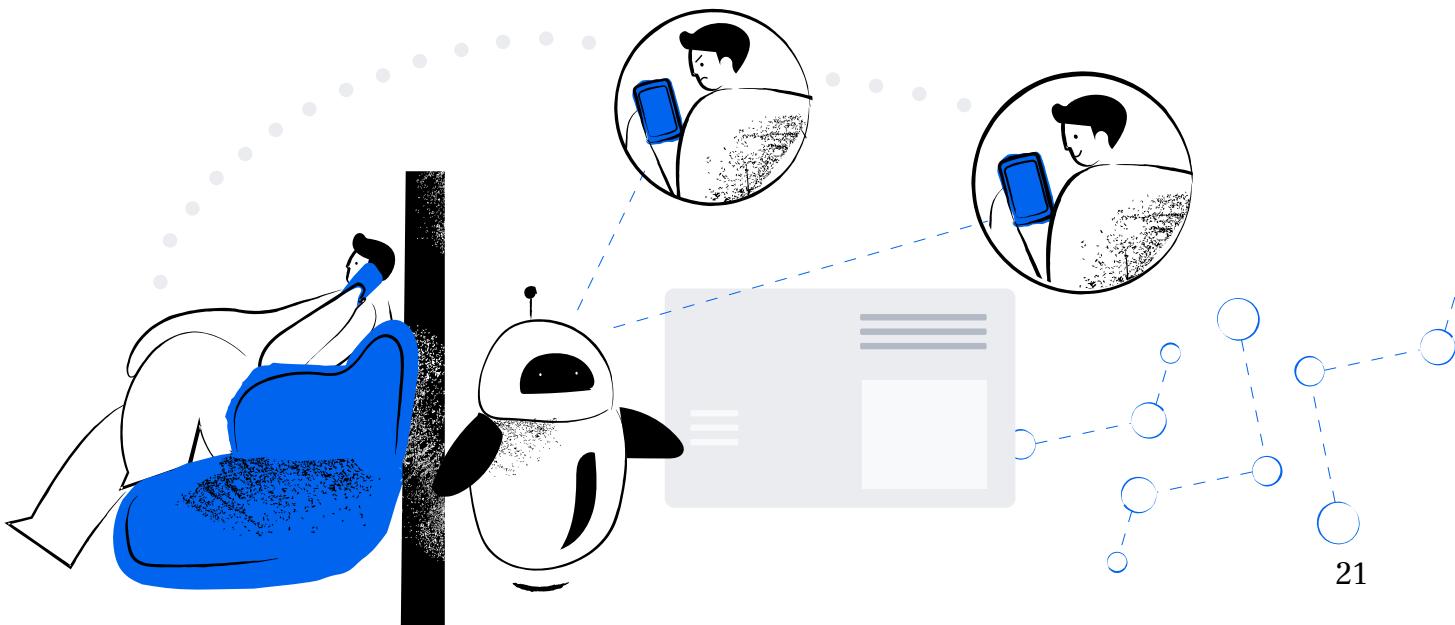
Invoca Signal AI is designed to allow you to better understand and predict consumer behaviors by mining data from phone conversations with your customers. Signal AI has been used to analyze over nearly 55 million calls to uncover new opportunities to boost marketing ROI. That's all great, but you're probably interested in how it actually works. Let's get beyond the AI buzzwords and dig into the 1s and 0s.

Is Conversation Intelligence Different from Call Tracking and Conversational Analytics?

Yes. Conversation intelligence is the overall solution that allows revenue-generating teams in marketing, sales, customer experience, and eCommerce to understand the motivations of each individual call, including the intent, outcomes, sentiment and decisions made, and take action on that data in real time. Call tracking is a tool within the Invoca conversation intelligence solution that provides attribution for phone calls to marketing sources. Conversation analytics is another part of the solution that is used to get data from the conversations you have with customers.

Conversation analytics is the process of extracting usable data from human speech and conversation using natural language processing (NLP) to allow computers to “understand” speech and artificial intelligence (AI) to extract and organize data from it.

Okay, that's a lot of alphabet soup to deal with. What it boils down to is giving machines the ability to process speech and allowing people to gain insights from massive numbers of conversations at scale – both of which were daunting if not impossible tasks just a few years ago. Natural language processing extracts data computers can use from human speech, and AI is used to organize that data and take action on it. Conversational analytics is used to extract and process data from both spoken speech (e.g. phone calls and voice assistants) and typed speech (e.g. customer service chatbots). The applications are myriad, so in this text, we will show you how Invoca's conversation intelligence solution is used to optimize marketing campaigns and improve customer experience.



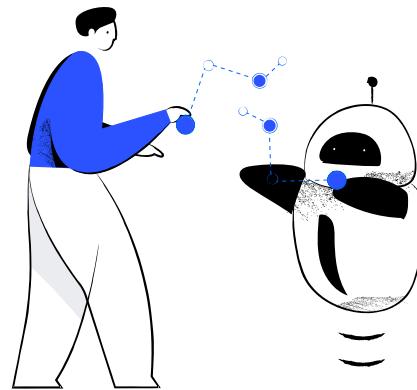
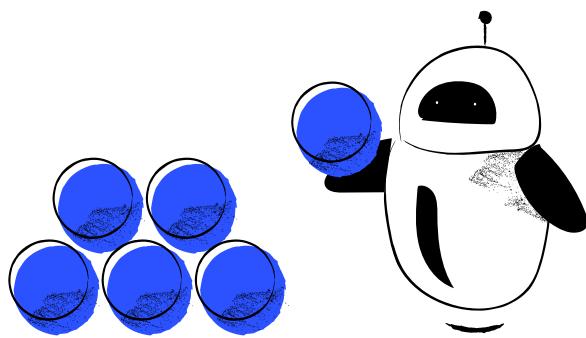
What is Machine Learning and Artificial Intelligence?

“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.

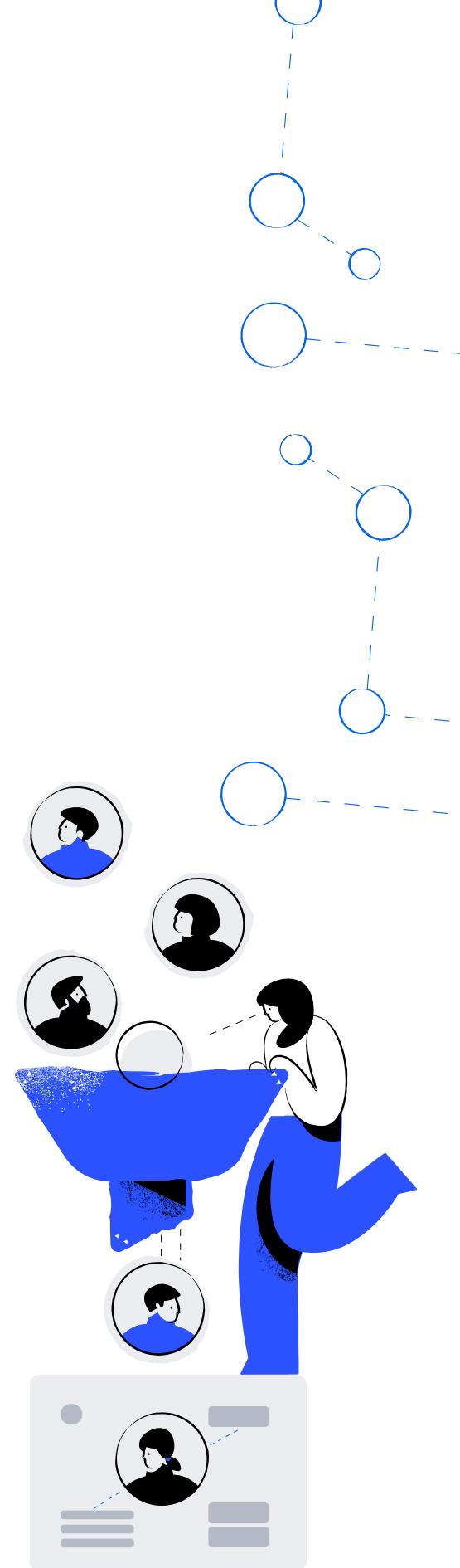
Using AI to Extract Value from First-Party Call Data

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 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.

So when it comes to conversations, 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.

Signal AI makes data from phone conversations accessible and actionable.

Signal AI is able to detect subtleties that humans might miss, as machines can identify patterns that people could easily gloss over, and Signal Discovery can analyze tens of thousands of calls to detect patterns and caller behaviors that humans could never pick up on at that scale.



How Does Invoca Signal AI Work?

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

Step 1

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.

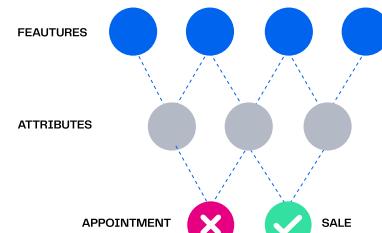
Step 2

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'.



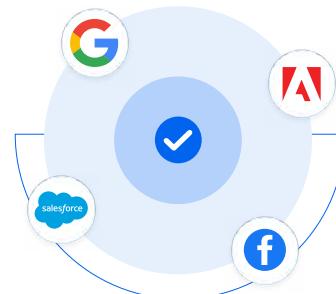
Step 4: Those outcomes and insights are pushed into your marketing stack so you can use this valuable conversation data to optimize marketing spend and personalize the customer's next interaction — all in real time.

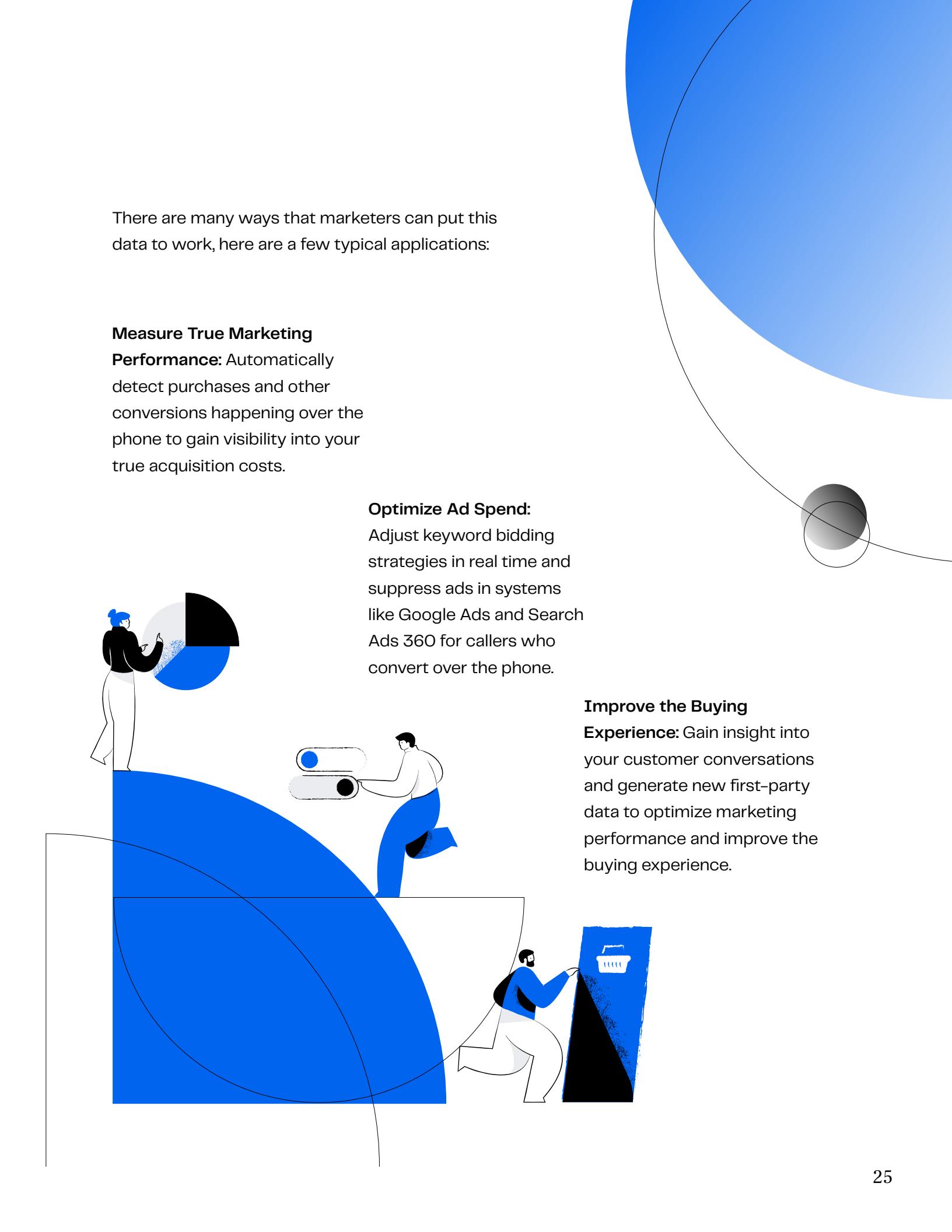
Step 3



Step 4

*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:

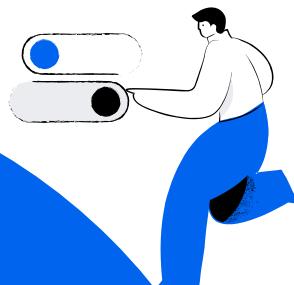
Measure True Marketing

Performance: Automatically detect purchases and other conversions happening over the phone to gain visibility into your true acquisition costs.



Optimize Ad Spend:

Adjust keyword bidding strategies in real time and suppress ads in systems like Google Ads and Search Ads 360 for callers who convert over the phone.



Improve the Buying Experience

Experience: Gain insight into your customer conversations and generate new first-party data to optimize marketing performance and improve the buying experience.



Invoca Signal Discovery

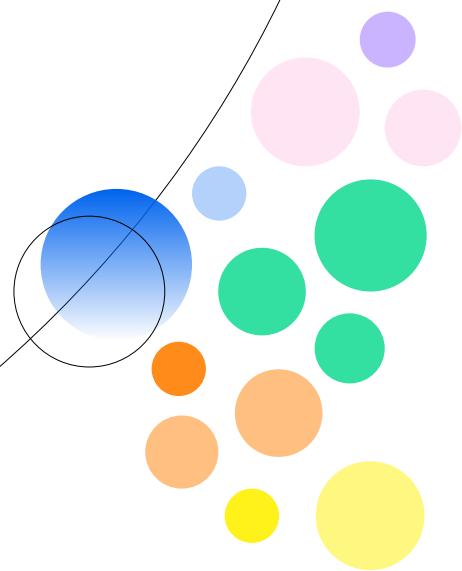
Signal Discovery is the latest enhancement to our conversation intelligence solution and a first-of-its-kind tool that provides marketers with a complete view into their customer conversations, helping them access new first-party data and insights.

Despite the fact that many B2C companies drive most of their sales over the phone, more than 56% of marketers have no idea what's said during the calls that they drive or what the outcomes of those calls are.



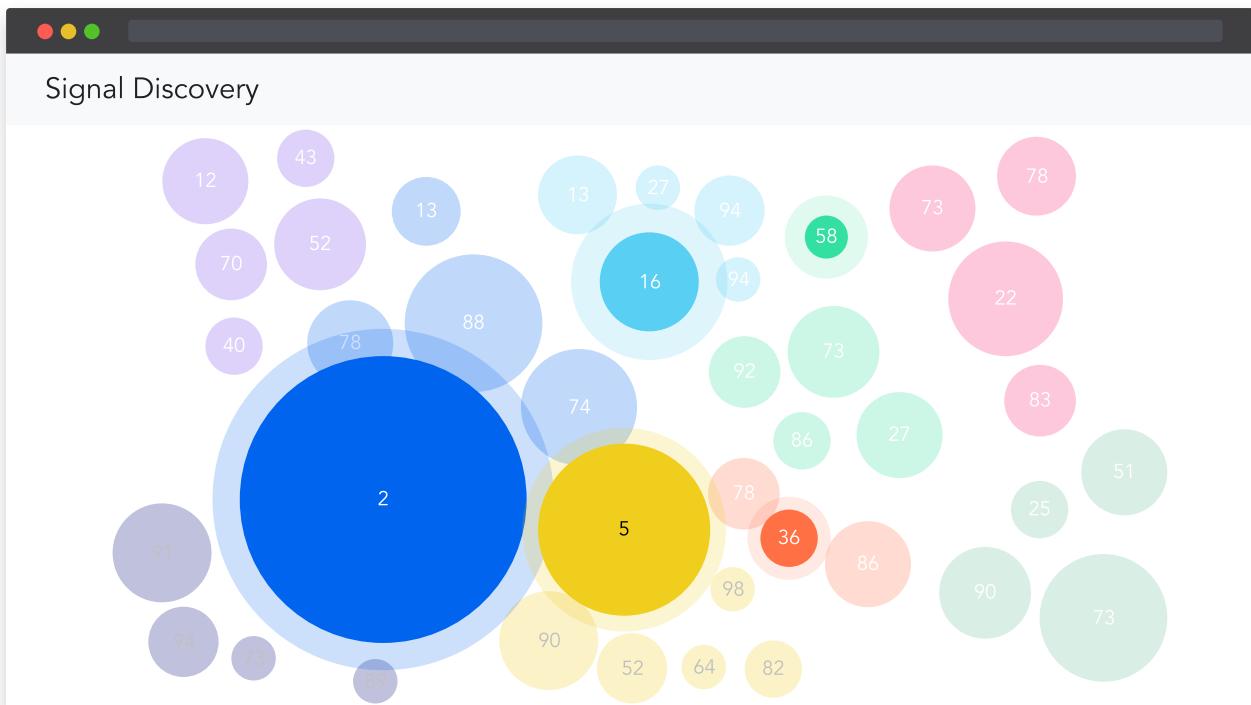
“ Conversations are overflowing with insights that don't always see the light of day outside the contact center. As a result, many companies are missing out on opportunities to create a more consistent and positive customer experience across human and digital touchpoints.”

Dan Miller,
Lead Analyst
Founder at Opus Research



How Signal Discovery Helps

Signal Discovery solves this issue by enabling marketers to quickly gain new insights from tens of thousands of conversations and take action on them in real time. Signal Discovery shows you real conversation topics with your customers in a full-color map, eliminating guesswork and assumptions about caller behavior by providing you with hard data.



The beauty of Signal Discovery is that it not only validates what you may think you know about caller behavior, but it also uncovers caller behaviors that you may not know exist. Pause to let that sink in ... Imagine uncovering buyer behaviors that you don't even know are occurring.

Things like:

“I was treating all call-driven appointments the same in my paid search optimization efforts but I discovered that there were actually 3 different types of appointments coming in through calls and over HALF were related to customer service and rescheduling. Now I know how to optimize only for new business appointments.”



“I discovered that 34% of my calls driven by paid search are from existing customers calling with technical or other support issues. By optimizing my bid strategy, I cut our cost-per-order and I freed up our call center sales agents' time to focus on other high-intent callers.”

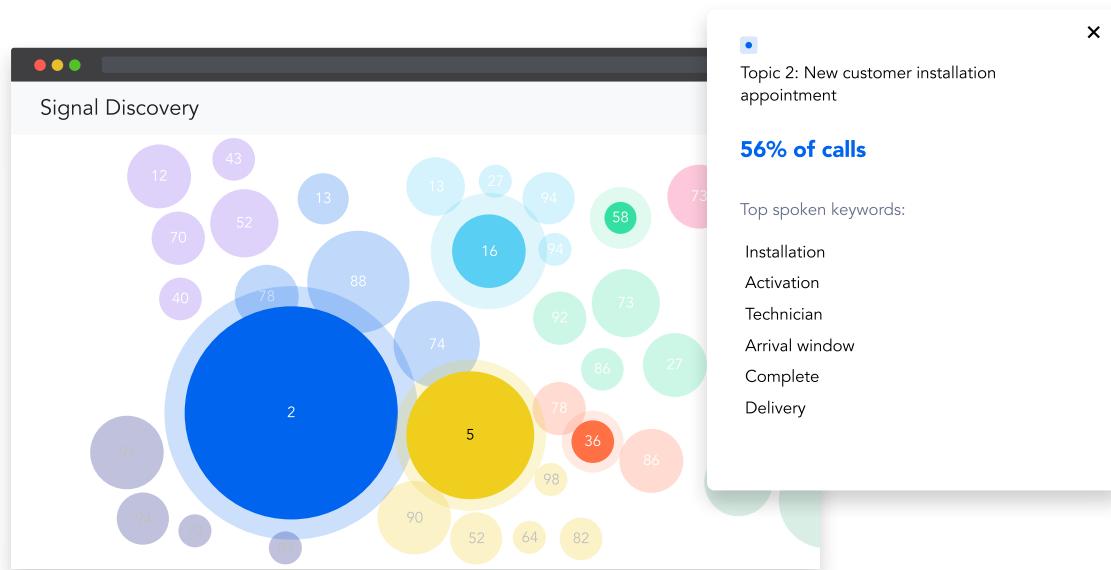


“I discovered an unknown IVR issue that was causing some customers to spend a lot of time on hold, get lost in the IVR, or get sent to voicemail. I also found out that almost 20% of my calls were being transferred multiple times and often to the wrong agent. Now I know how to route calls and deliver the best possible buying experience.”

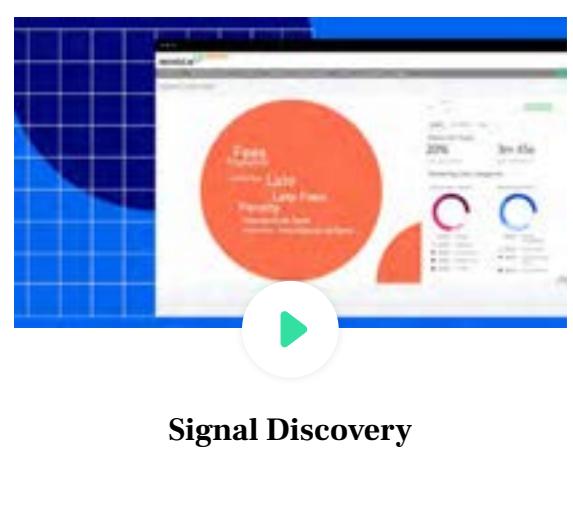


How Signal Discovery Works

Signal Discovery creates valuable insight by using learnings extracted from past conversations to detect occurrences in future conversations. Signal Discovery uses a type of AI called “unsupervised learning,” which means the technology automatically groups conversations into distinct topics without any human guidance or training data needed. It listens to everything in every call and then creates clusters of conversation topics based on similarities in speech patterns.

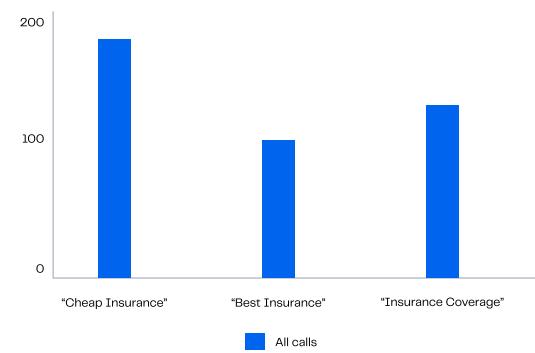


From there, you're able to drill down into each topic to understand caller behavior, see topic-level insights (including the top marketing sources, channels, and campaigns associated with the topic) and then create a “Signal” to detect the topic on new inbound calls, so you can automate your marketing, such as pushing data in real time into Google Ads or Adobe Analytics. No more guesswork, no more risky call assumptions. **Watch this video to see how Signal Discovery works.**

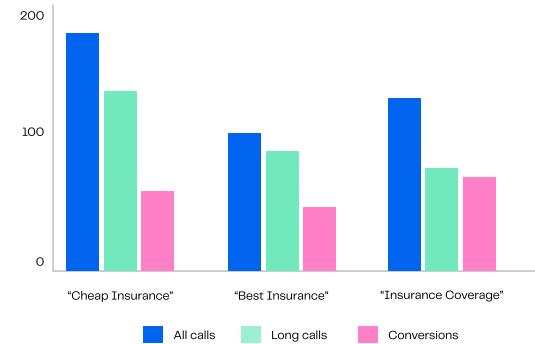


Exercise: Use Invoca Data to Optimize an Ad

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.

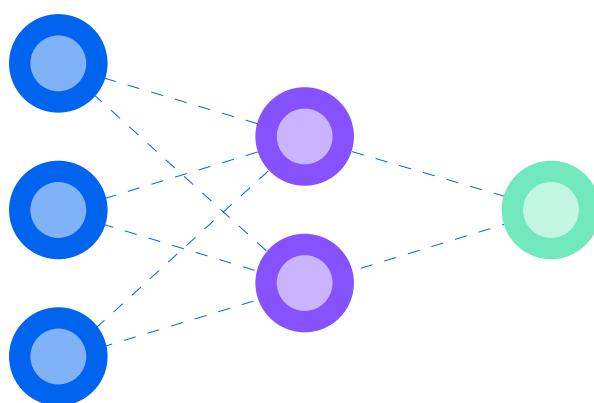
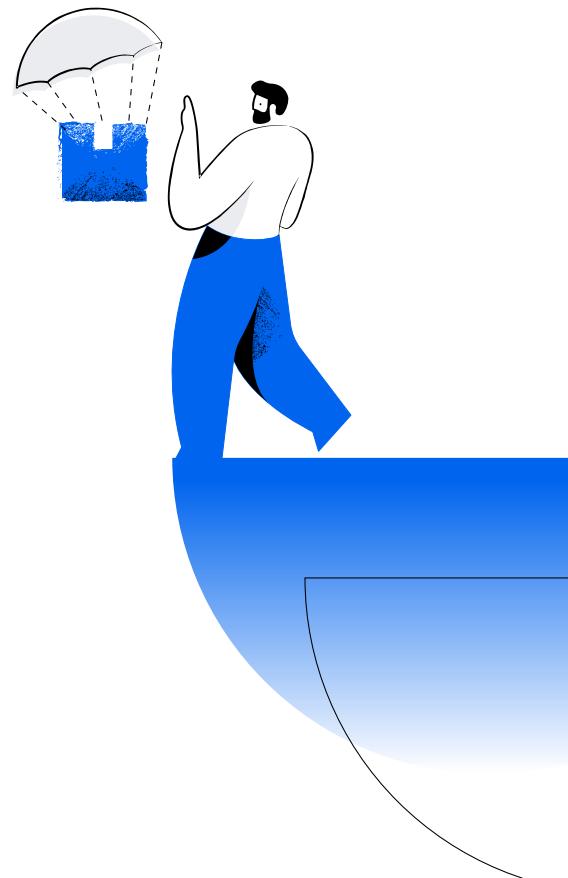
How Signal AI is Implemented

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.

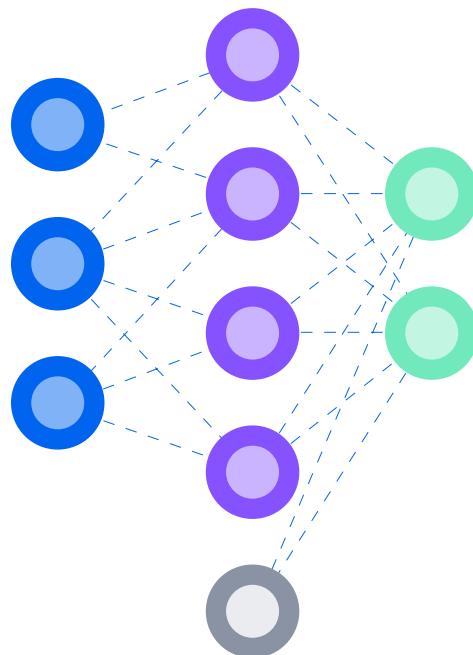




Custom AI

Businesses 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.



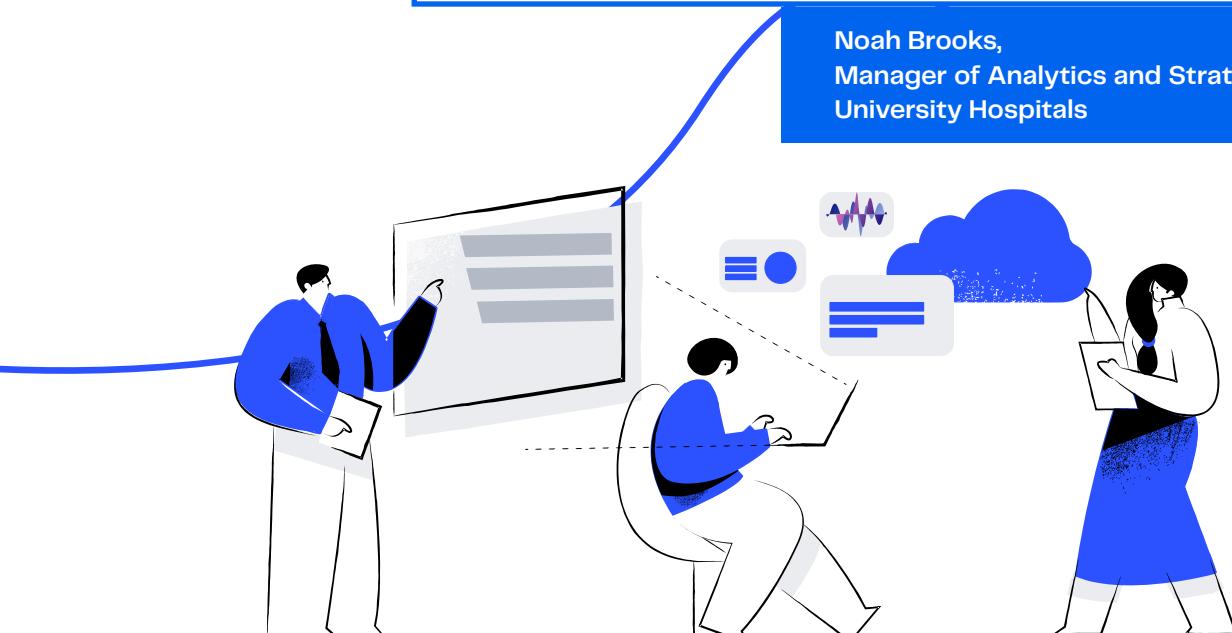
Is Active Conversation Intelligence for Me?

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 conversation intelligence solution that uses AI to make the most of conversational data. Most marketers know 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.



“ 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



Conversation Intelligence and 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 the most common misconceptions about conversation intelligence 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.

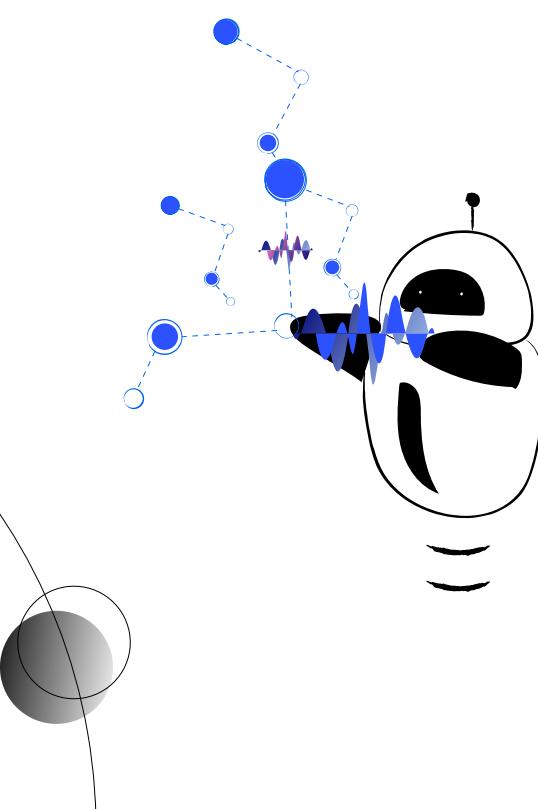
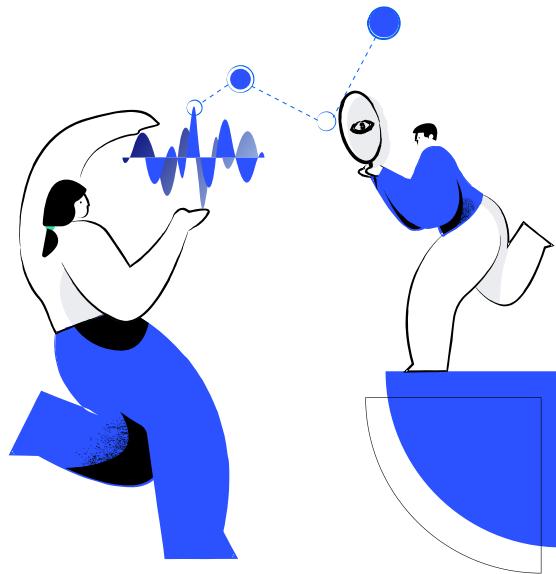
Truth: The Bots Have You Beat

AI doesn't get tired or bored.

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

AI can improve over time.

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



Fallacy #2: Conversation Intelligence 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.

Truth: Pre-Trained Models Get You Going Fast

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

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



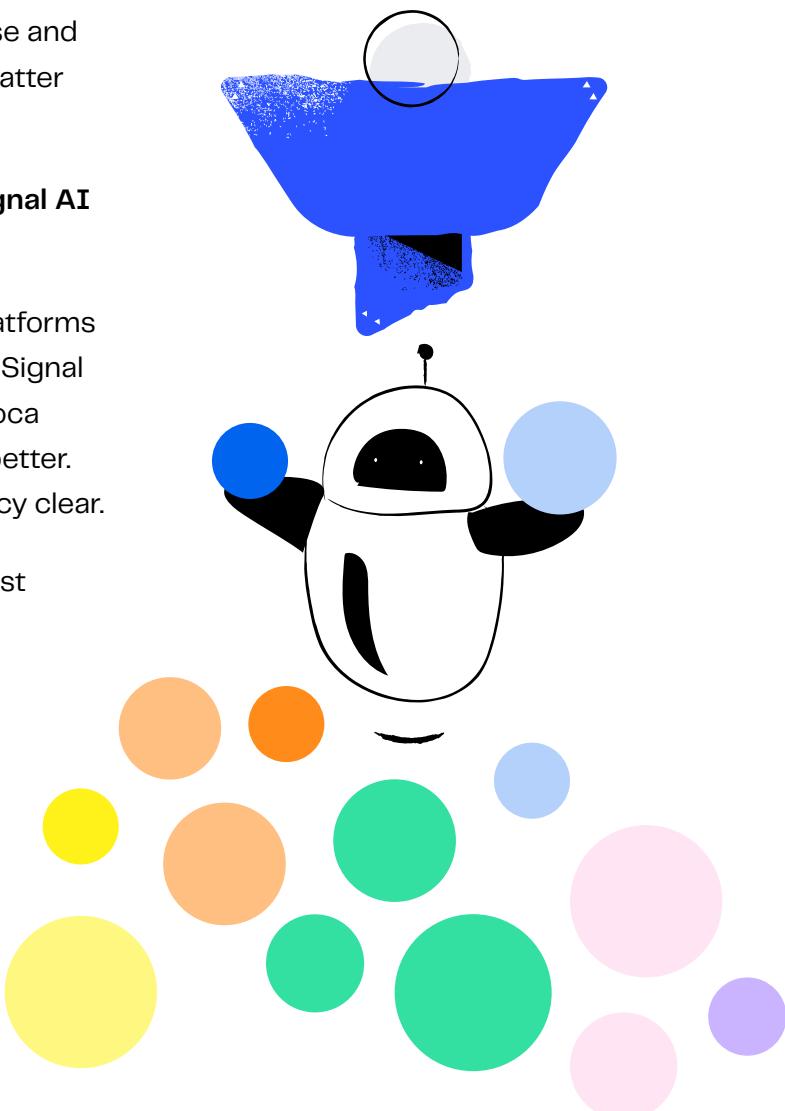
Fallacy #3: All Conversation Analytics AI Systems are Created Equal

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

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.

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



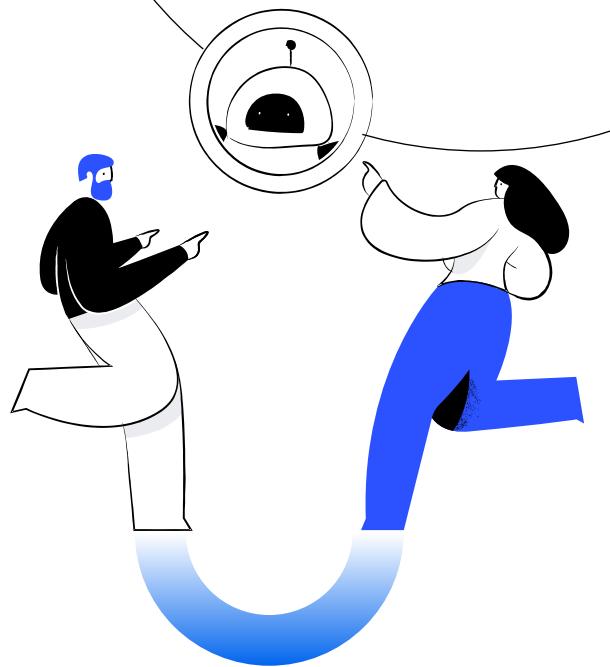
Fallacy #4: AI Only Makes Sense For Fortune 500 Marketers

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

Truth: Smaller Marketing Teams Can Benefit from Call Tracking AI

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

You don't need a giant IT team (or any IT team at all) to 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.



Fallacy #5: Signal AI is Too Expensive

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

Truth: Accurate Attribution Pays for Itself

Accurate attribution = better optimization.

Better optimization = higher ROI.

Higher ROI = bigger bonus check for you.

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



Test Your Knowledge – Section 2.0

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:

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

True False

Question 4:

How can marketers use data from Signal AI:

Optimize Ad Spend Seed Audiences
 Personalize Content All of the above

Question 5:

You cannot access call recordings in Signal Discovery topics

True False

Question 6:

Conversational analytics is not the same thing as call tracking.

True False

Test Your Knowledge – Section 2.0 Answers

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:

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

False

Question 4:

How can marketers use data from Signal AI:

All of the above

Question 5:

You cannot access call recordings in Signal Discovery topics

False

Question 6:

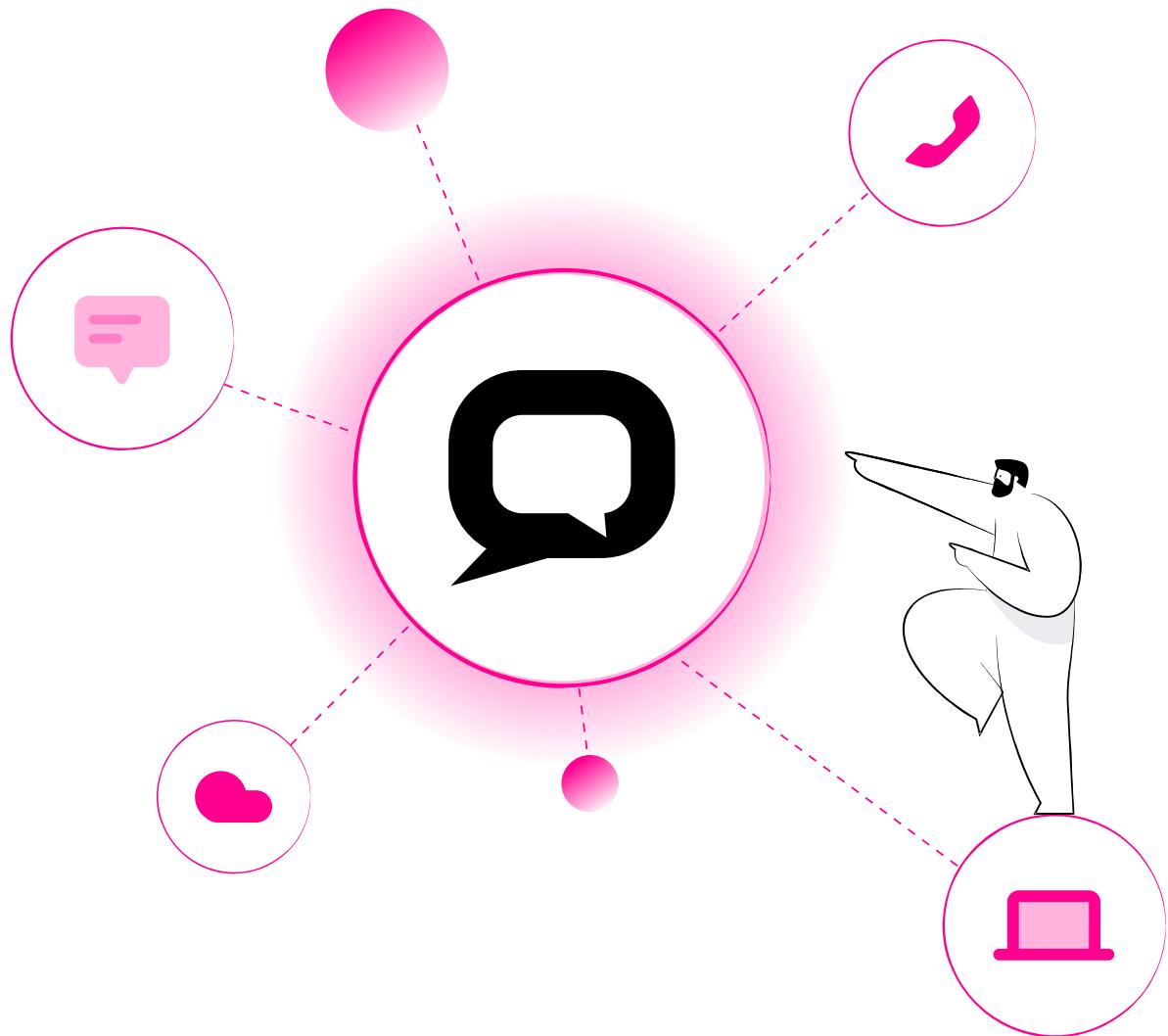
Conversational analytics is not the same thing as call tracking.

True



3.0:

How Invoca Integrates With Your Tech Stack



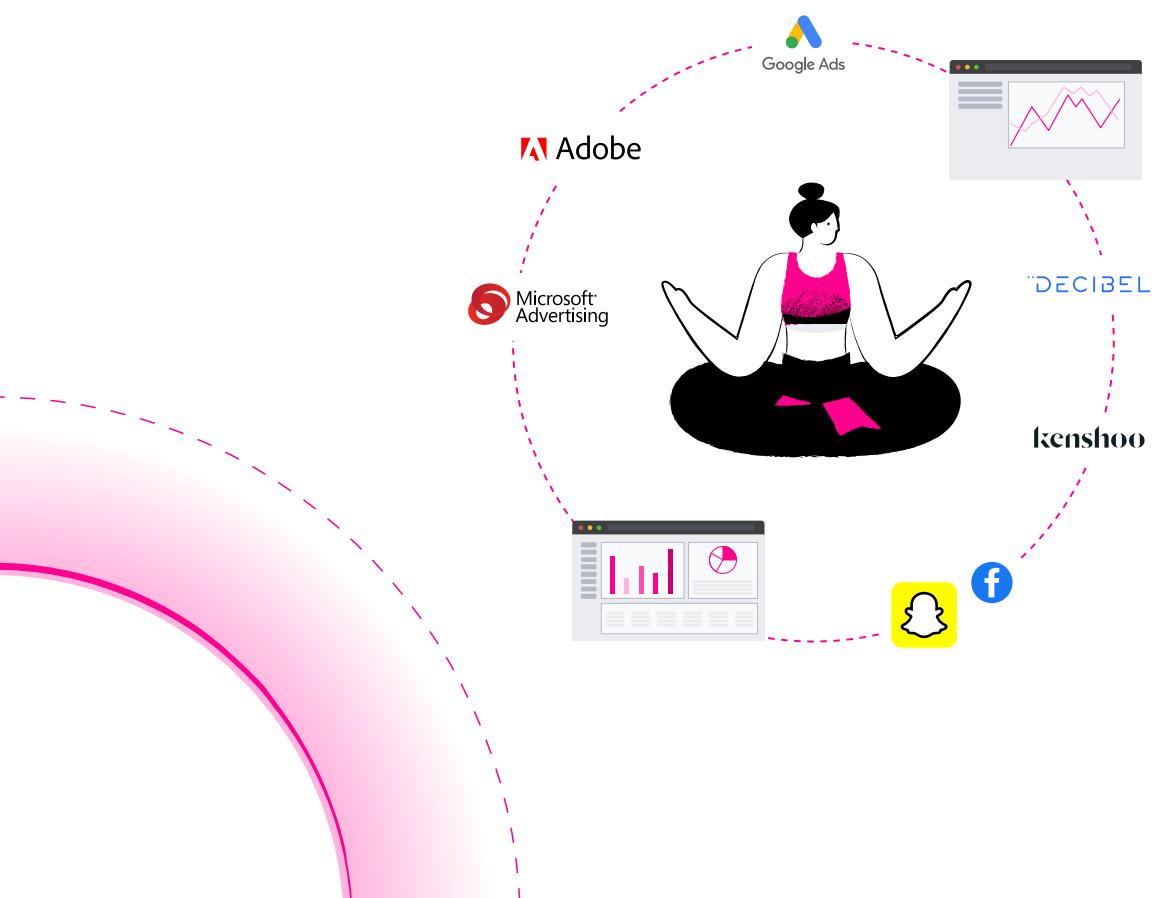
In this section, you will learn how Invoca's integrations work and how they are used.

Integrated Data for Automated Results with Invoca's Integrations

The #1 reason that companies switch to Invoca is for our integrations. The reason for this is that call tracking and conversational analytics platforms do not work in a vacuum — the best data in the world can't help you succeed if it's stuck in your call tracking platform. The data has to be able to integrate neatly into your adtech and analytics stack to inform those tools so you can make smarter, real-time decisions with the added benefit of call tracking data.

What makes Invoca different is that you can get your data to your other tech platforms automatically, in real time. No spreadsheets, no pivot tables, no manual work. It's always on, it's automated and moving data where you need it, when you need it. "Real time" means automated keyword bidding, retargeting, and suppression, which results in optimized marketing budgets.

From attribution to telephony, here are how our partnerships and integrations help you get more out of all your marketing investments.



Invoca Customers on the Importance of Integrations



“ One of the great things about Invoca is that it acts as a hub for us. A lot of data goes into Invoca and we’re able to connect it to Adobe Analytics, Google, Bing, Facebook, and more.” Will Guimont, VP of analytics and reporting, eHealth



“ Our old platform was unreliable, and integrations never worked the way we wanted them to—it was just too hard to get the data we needed out of the platform.” Jeff Stewart, assistant vice president of digital communications, VITAS



“ When you invest in a call tracking platform, that platform becomes the lifeblood of your business. If it isn’t efficient or if it’s confusing, it will almost certainly hamper your business.” Zach Bradley, COO and partner, D2M

What Makes Our Integrations Work

The flexibility of Invoca's data delivery is at the core of what makes our integrations work seamlessly and get you up and running faster.

Sending Data to Other Systems

- Attribute call data to campaigns, ads, and keywords
- Create retargeting and suppression audiences
- Share digital data in real-time for call center agent personalization
- Pass data for data visualization and reporting



Getting Data from Other Systems

- Receive caller data in real time from CDPs when the call is placed for routing rules
- Closed-loop conversion reporting to use for optimization and personalization

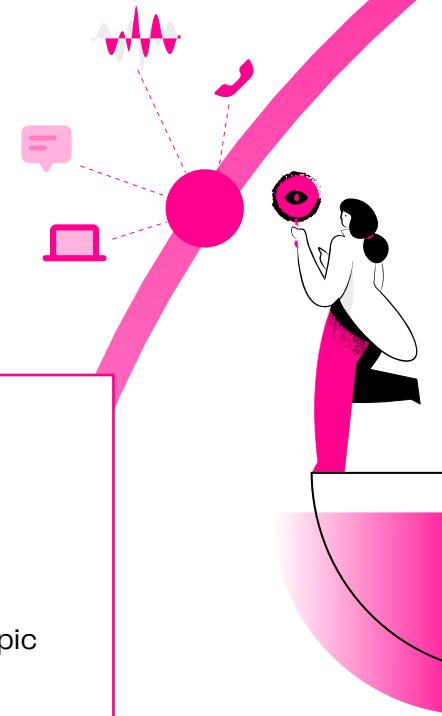
Tracking

- Easily implement and manage our JavaScript across sites
- Integrate Invoca phone numbers in other platforms to facilitate call tracking & analytics



Automation with Invoca

From this flexible data delivery, you also get unmatched marketing automation capabilities with Invoca.

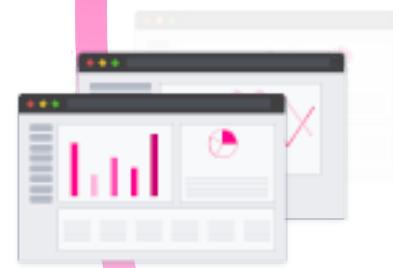


Start with Better Data

- Capture data at the most granular level possible simply and quickly with the Invoca tag
- Industry-leading AI detects any conversational topic or call outcome

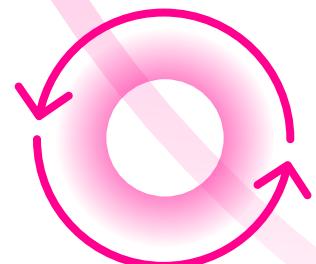
Unleash it Across Your Tech Stack

- Free your data: integrate it into hundreds of platforms using webhooks, APIs, and automated file deliveries.
- Act in real time data for up- to-the-minute optimizations



Simplify the Complex

- Get up and running in minutes across multiple accounts with self-serve integrations
- Say goodbye to manual processes: closed-loop reporting that's automated and always on



Available Integrations with Invoca

The following are the core integrations available with Invoca and how they work.

Paid media optimization & attribution

Invoca features native integrations for the most popular search, display, and social media advertising platforms to make it easy for you to optimize your paid media with conversational analytics data. No matter what platform you use for paid media optimization and attribution, you can make it more effective with Invoca.

Search & Display:



Google Ads



Native reporting in ad platforms like Google Ads and Microsoft Advertising can only provide basic proxy-based attribution data for phone calls, like how many times the number in the ad was called and, in some cases, if the call connected, and call duration. Invoca's integrations close the loop providing 1-to-1 attribution, giving you the data you need to feed ad platforms to make your campaigns more efficient, effective, and agile. Our ad platform integrations allow you to:



Unify offline and online conversion data



Attribute conversions at the campaign, ad group, ad, or keyword level



Track calls from website visits, call extension, or call-only search ads

Keyword	Campaign	Ad group	Status	Max CPC	Conversions
Lowest Mortgage Rates	Branded-Fin Serv	Fin Serv	Eligible	400.00	
Appointment Submitted (call extention)				70.00	
Application Submitted (web page form)				175.00	
Application Submitted (web page calls)				155.00	
Total: All enabled keywords				400.00	
Total: Account				400.00	



Report calls and call outcomes as “offline conversions” in real-time



Attribute call conversions at the keyword, ad, and campaign levels



Optimize ad spend

The screenshot shows a Microsoft interface for managing conversion goals. At the top, there are buttons for '+ Create conversion goal' and 'Status: All conversion goals'. A search bar is labeled 'Goal name'. Below is a table with columns: 'Goal name', 'Tracking status', 'Include in "Conversions"', 'Type', 'Scope', 'Count', and 'Conversion wind'. The table lists 10 entries, each with a green dot icon and the text '01 New Application Inquiry - Invoca'. The 'Scope' column shows 'All' for most entries and 'Unique' for two. The 'Count' column shows various time periods: '90 days, 0 hours, 0 minutes', '90 days, 0 hours, 0 minutes', '40 days, 0 hours, 0 minutes', '30 days, 0 hours, 0 minutes', '5 days, 0 hours, 0 minutes', '77 days, 0 hours, 0 minutes', '80 days, 0 hours, 0 minutes', and '60 days, 0 hours, 0 minutes'.

See section 5.0 for more details or watch this video to see how it works.

The screenshot shows a Google Ads interface titled 'All campaigns'. On the left, there's a sidebar with 'Recommendations', 'Campaigns', 'Ad groups', 'Ads & extensions', 'Landing pages', 'Keywords', 'Audiences', 'Demographics', 'Topics', and 'Placements'. The main area is a table with columns: 'Keyword', 'Campaign', 'Ad group', 'Status', 'Max CPC', and 'Conv.'. The table shows several rows of data, with a green dot icon next to the first row. A large green play button is overlaid on the bottom right of the interface.

Optimize paid search campaigns in Google Ads



Retargeting:

Invoca's integration with Criteo enables marketers to introduce offline events into their digital retargeting campaigns making them more targeted and more personalized. With Invoca & Criteo you can:



Get More accurate and complete customer insights to gain an understanding of how prospects and customers move through the funnel with the added layer of call analytics



Segment and engage customers online with personalized advertising based on their phone activities using Invoca's proprietary AI technology



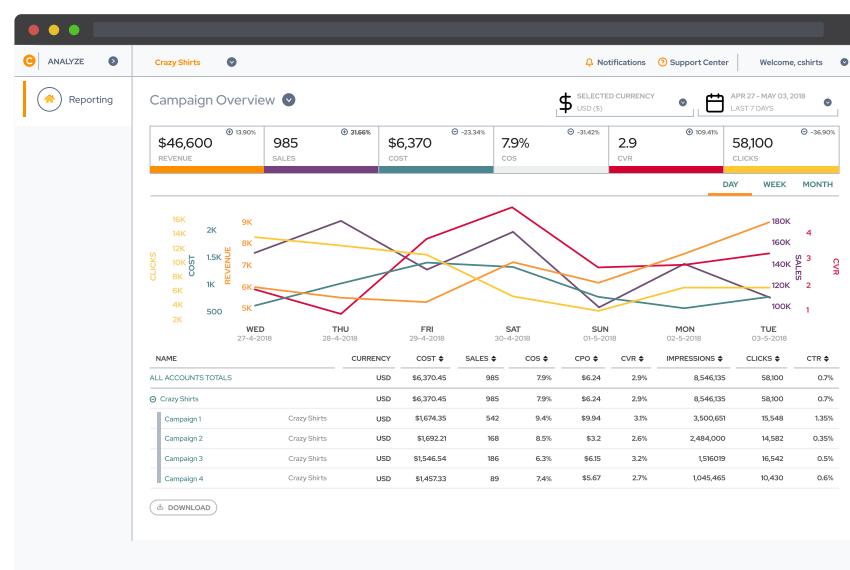
Create and target audiences based on the content and outcomes of phone calls



Know if and when a user who clicks an ad makes a call and if they convert



Improve performance over time with call analytics



Social Media:

You can drive calls from social media advertising, but the platforms do not allow for granular reporting or attribution of call outcomes. Invoca has native integrations for Facebook, Instagram, and now for Snapchat's new Swipe Up to Call ads so you can attribute call outcomes to your social media ads. You can also use conversion data from Invoca to create lookalike audiences on Facebook and Instagram so you can connect with audiences that look like your most valuable customers. With these integrations you can:



See the campaigns, ad sets, and ads driving calls and conversions



Use call data for personalized retargeting



Create lookalike audiences to expand your reach

A screenshot of a computer interface titled 'Ads'. The top navigation bar includes 'Search', 'Filters', and a 'Review and Publish' button. Below the bar, there are tabs for 'Campaigns', 'Ad Sets', and 'Ads', with 'Ads' currently selected. Under the 'Ads' tab, there are buttons for '+ Create', 'Duplicate', 'Edit', and 'A/B Test'. The main content area displays a table with the following data:

Digital Advertising Platforms:

Do you know which traffic sources, campaigns, landing pages, and keywords are driving your valuable call conversions?

Thanks to Invoca integrations with Kenshoo, Marin Software, and Adobe Advertising Cloud, search marketers no longer have to operate their marketing campaigns with the limited view of just digital interactions. The robust combination of bid management software and inbound conversational analytics data provides search marketers with a complete picture of both online and offline search marketing performance. Search marketers using the Invoca + Kenshoo integration are able to:



kenshoo



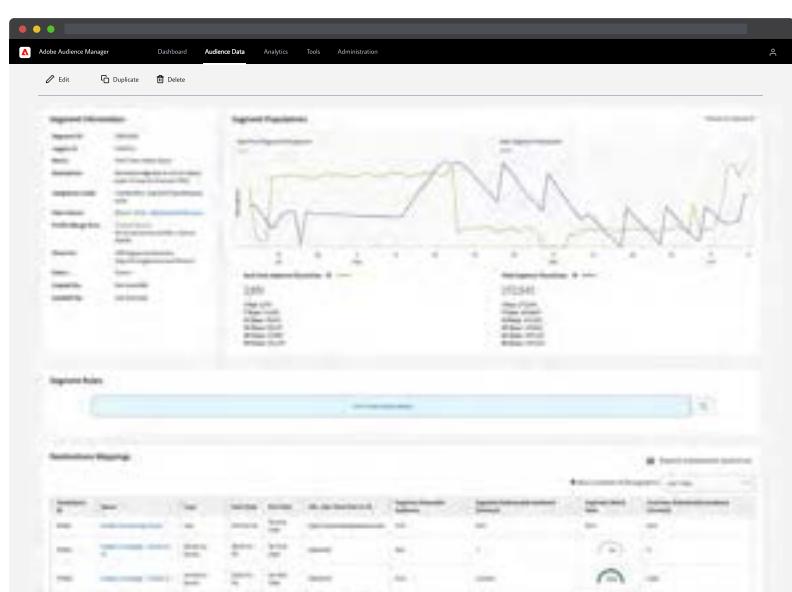
Identify the traffic sources, campaigns and keywords driving phone conversions



Optimize keyword bids for clicks and call performance



Measure true keyword and overall SEM ROI



Web analytics & optimization

Web Analytics:

Whether you are a Google or Adobe shop, Invoca has the native integrations to get call data into the analytics platform you use every day. Marketers using Invoca's analytics integrations can:



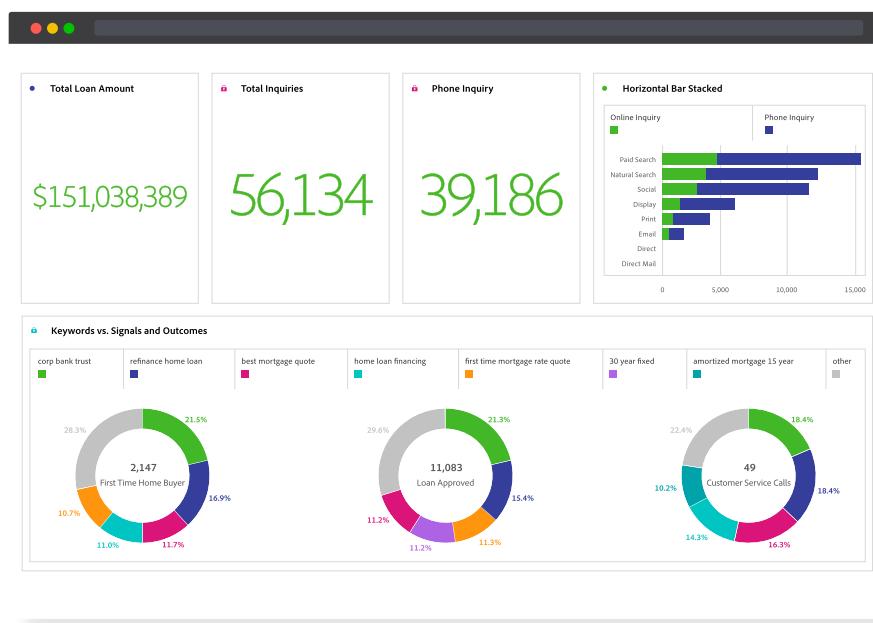
Report calls and Signals to Google Analytics as events



Seamlessly incorporate offline call and digital data



View the digital and offline call data together for better optimization





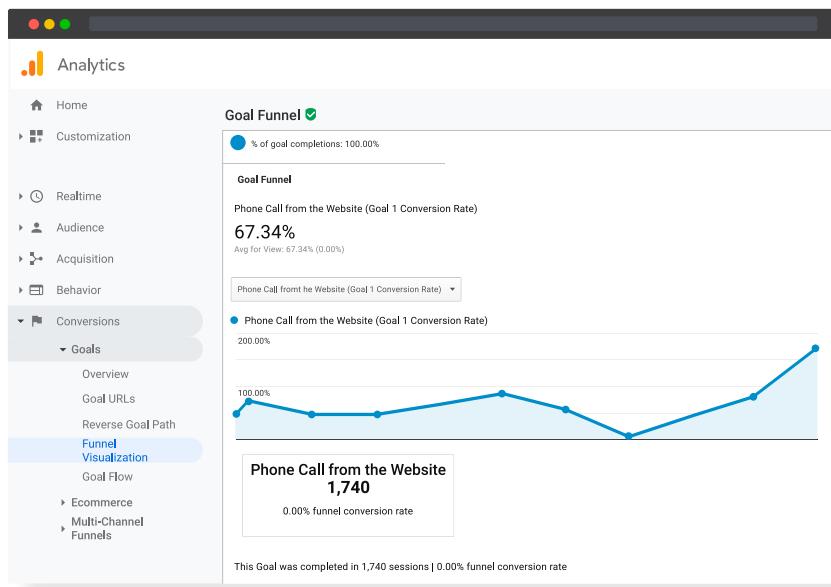
Tie each phone call you receive to the caller's unique Adobe Visitor ID



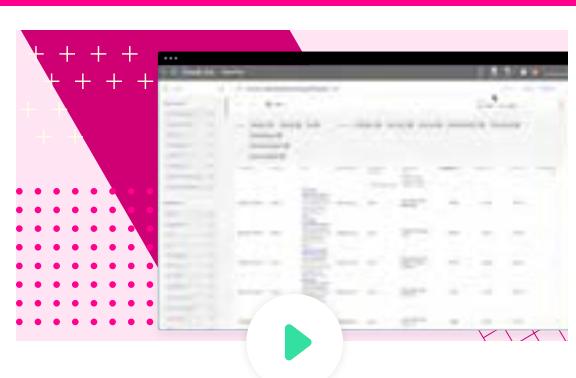
Include call data and Invoca Signal insights into your digital data



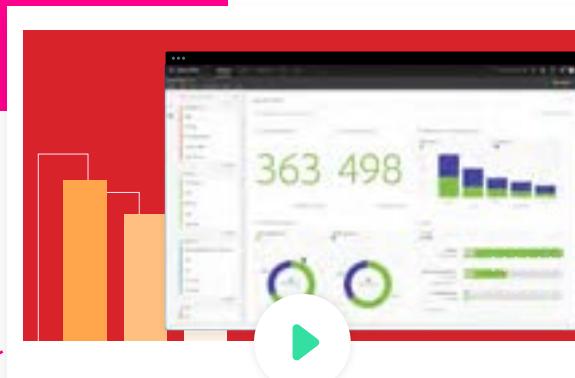
Optimize marketing spend with complete attribution across all channels



Watch these videos to see how Google and Adobe Analytics integrations work.



Optimize paid search campaigns in Google Ads



Use call data for attribution and audience creation with Adobe Analytics



Website Optimization:

With the integration of Invoca's call tracking and conversational analytics digital optimization tools, you can uncover the exact points in the online journey where consumers leave the e-commerce flow and reach out for help over the phone. The full view of the customer journey, both digital and in the phone call, delivers unprecedented insight so that CX professionals can optimize the digital experience to increase customer acquisition and conversion. With these integrations, you can:



Diagnose and fix frustration-driven calls like confusing web experiences, website errors, and bad purchase flows



Optimize for positive call drivers that result in high-value purchases

A screenshot of a computer interface titled 'Segments'. The main content area displays session details in a table format. The session ID is F1C2946. The local time is 23/06/2020 16:56:52 GMT. The status is Engaged, and the visit is 4 of 7. The location is United States, and the language is English (United States). The device is a Desktop, and the OS is macOS 10.15 Catalina. The browser is Chrome 83.0, and the channel is Direct. The goal count is 3, and the avg wait time is 475ms. There are two checked items: 'Appointment Set' (True) and 'Call Recording' (https://www.invoca.net/call/recording). The 'Sales Call' checkbox is also present but not checked.

Session ID	F1C2946	Browser	Chrome 83.0
Local Time	23/06/2020 16:56:52 GMT	Channel	Direct
Status	Engaged	Goal count	3
Visit	4 of 7	Avg wait time	475ms
Location	United States	Opened tabs	2
Language	English (United States)	Appointment Set	True
Device	Desktop	Call Recording	https://www.invoca.net/call/recording
OS	macOS 10.15 Catalina	Sales Call	True



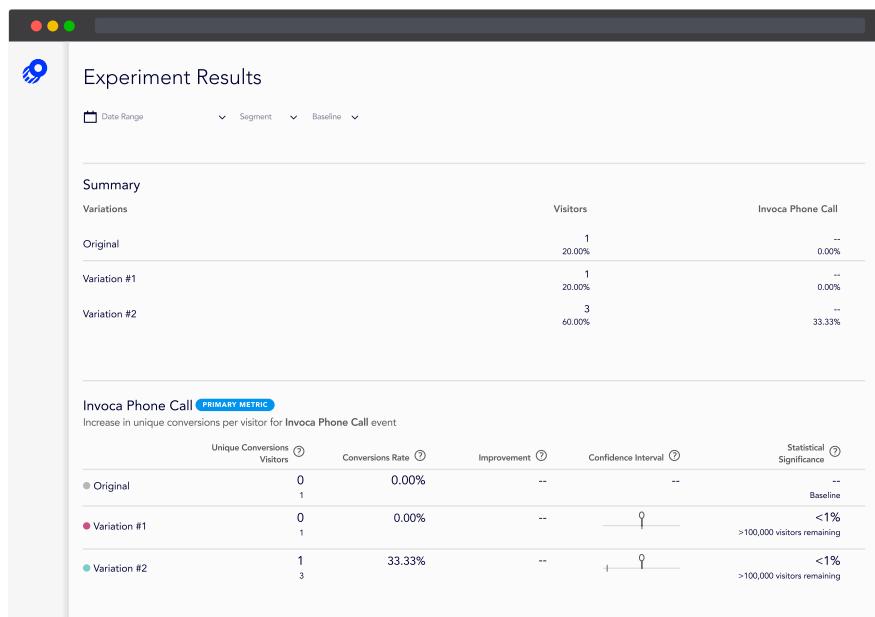
Optimizely is a leading marketing experimentation platform, making it easy to test, learn from, and deploy customer experiences. The Invoca for Optimizely X integration connects Invoca to your Optimizely X Web Experimentation and Personalization products. By integrating Invoca and Optimizely, you can:



Serve conversion data from your inbound phone calls



Use Invoca Signals to act as new Events for your Optimizely experiments





Adobe Target is an A/B testing and personalization tool that helps you optimize and personalize your marketing assets.

By integrating Adobe Target with Invoca, you can:

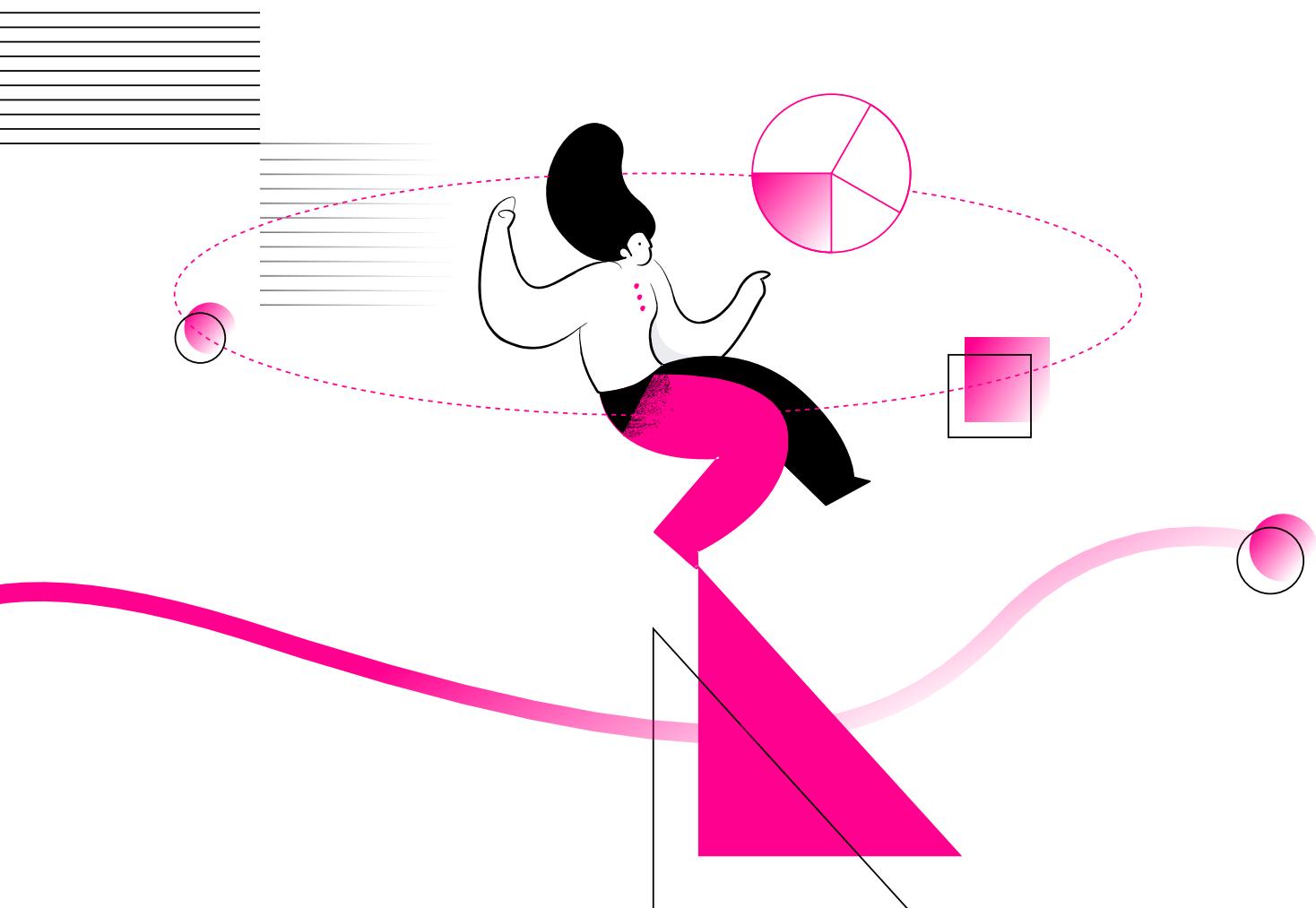


Incorporate call data to create new segments



Generate more tailored experiences by showing the most relevant messaging and content to your customers

The screenshot shows the Adobe Target interface for an A/B test titled "Mortgage Application - Optimize for Phone Conversions". The test is set up to target "All Visitors" with a 50/50 split. "Experience A" is the Control, and "Experience B" is the variant, which includes a "Next" button. The interface includes sections for Activity Location, Activity QA, Goal (Increase Conversion), Info (Priority 0, Activity ID 338169), and Target (audience selection and traffic allocation).



CRM, CDP, & DMP

Invoca's native data platform integrations make it possible for marketing, sales reps, the call center, and everyone else in your organization to get a 360-degree view of customer data. Bidirectional integrations enrich your customer data in both your CDPs and the Invoca platform.

CRM:



Invoca's integration with Salesforce Sales Cloud empowers your reps to close more deals and gives your marketing team the data it needs to drive more high-converting leads. The result? Campaigns that deliver more conversions and higher revenue. Teams using Invoca's Salesforce integration can:



Automatically create new leads or append call data to existing leads or contacts



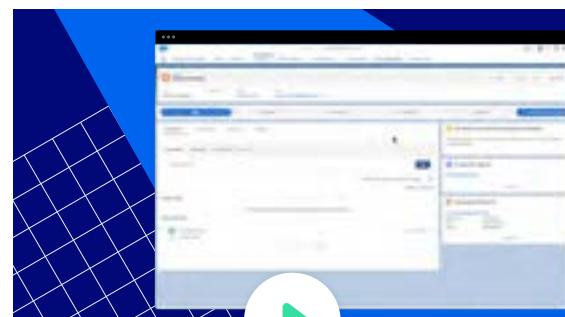
Use call data to enable reps to deliver a more personalized experience



Understand the outcome of each call with automated closed loop reporting



Watch this video to see how Invoca works with Salesforce Sales Cloud.



Close the loop on attribution with Salesforce Sales Cloud

CDP:

Invoca and Tealium combine their capabilities with a bi-directional integration to enable more accurate insights and better customer experiences through online and offline interactions for both solutions. Simply put, Tealium sends Invoca rich customer data and Invoca sends Tealium conversation data for a classic win-win. With this integration, you can:



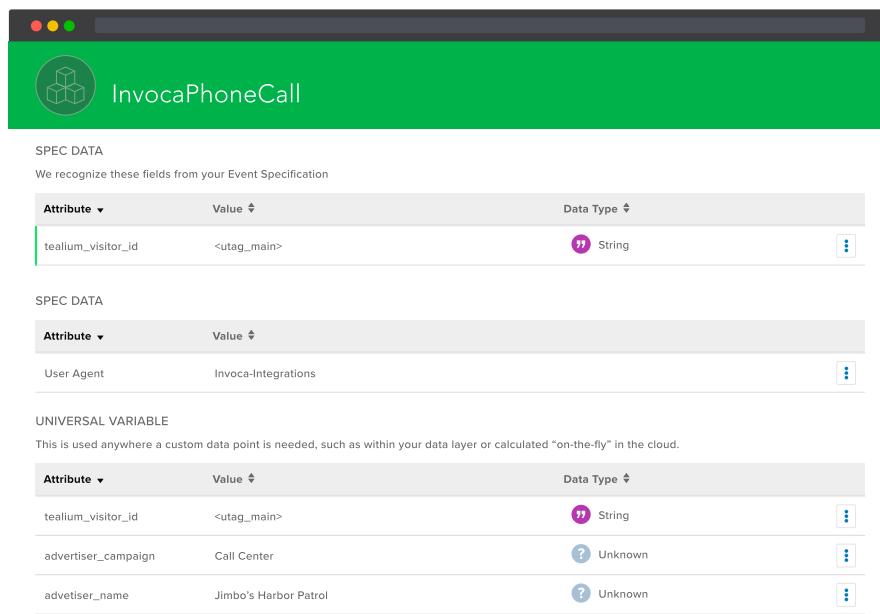
Enrich customer profiles with inbound call data to get better visibility into your customer's journey and create complete customer profiles in Tealium



Create better-informed call center interactions by combining call data with the customer data available in Tealium, supplying helpful context to inform call center interactions



Improve the caller experience with behavioral data that is collected prior to the call being placed, allowing Invoca to intelligently route the caller to the right agent



The screenshot shows the Tealium interface for defining data mapping for an event. The top section is titled 'InvocaPhoneCall' with a green header. It includes sections for 'SPEC DATA' and 'UNIVERSAL VARIABLE'. The 'SPEC DATA' section shows a table with one row: Attribute 'tealium_visitor_id' with Value '<utag_main>' and Data Type 'String'. The 'UNIVERSAL VARIABLE' section shows a table with three rows: Attribute 'tealium_visitor_id' with Value '<utag_main>' and Data Type 'String'; Attribute 'advertiser_campaign' with Value 'Call Center' and Data Type 'Unknown'; and Attribute 'advertiser_name' with Value 'Jimbo's Harbor Patrol' and Data Type 'Unknown'. Each row has a 'More' button (three dots) on the right.

Marketing Automation



Invoca's integration with marketing automation platforms allows you to take the next best action with customers who have engaged with your company over the phone. With Invoca's HubSpot Integration, you can:



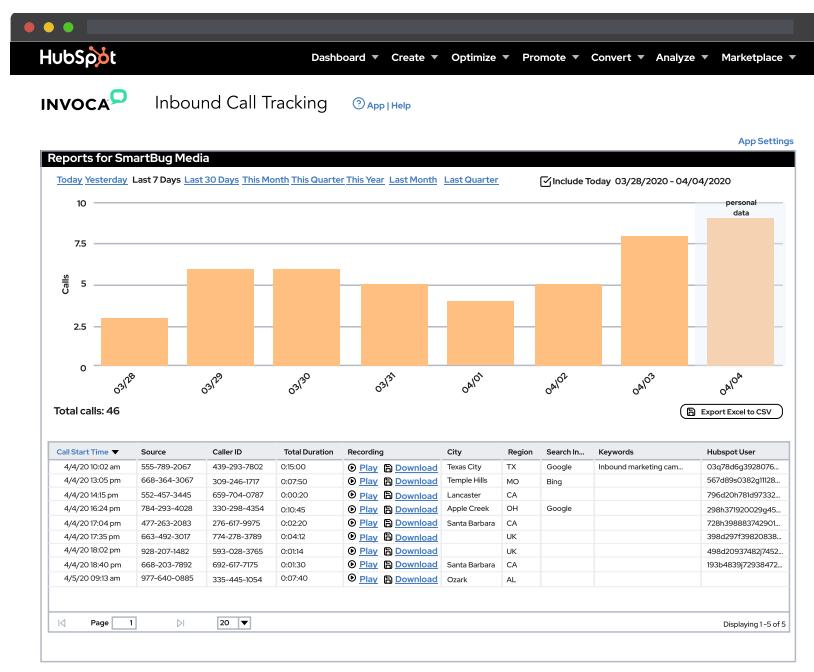
Attribute phone calls driven from a landing page back to the appropriate unique contact within HubSpot

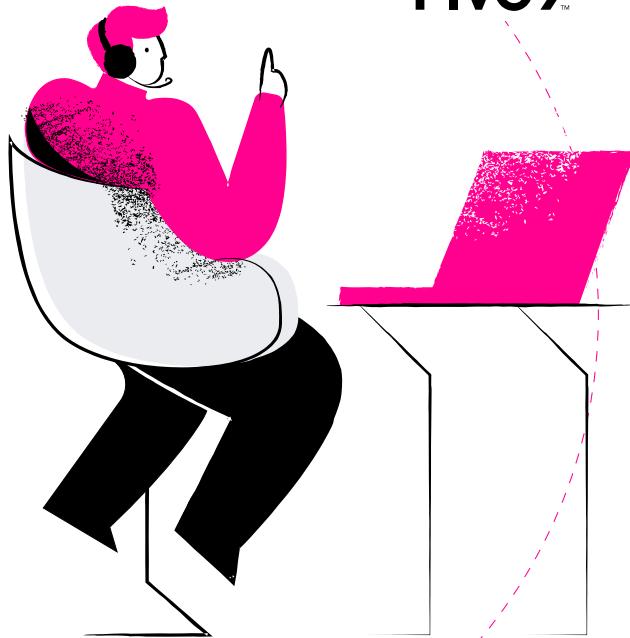


Report unique "inbound phone call" form submissions to append existing HubSpot contacts



Create new contacts with data from inbound phone call form submissions





Telephony & contact center

Invoca integrations with call center and telephony applications like Five9 and Genesys allow you to give the agents in your call center the data they need to convert more effectively and efficiently. With these integrations, you can use Invoca data to capture the referral source and unique identifiers and rich demographic data for your callers. Using this integration, you can:

- Improve dynamic call routing
- Identify whether or not the caller is a new or existing customer
- Create new customer records
- Automate caller data entry in the customer record
- Show the best script based on the marketing channel or source that referred the caller
- Record the correct attribution data for new leads to later optimize your marketing spend

Integrations With All Other Platforms

If you use an in-house-developed data management platform or just don't see the software you use on this list, don't fret. Invoca's webhook functionality and exhaustive API documentation makes it possible to integrate Invoca data with nearly any platform you can imagine.

Test Your Knowledge – Section 3.0

How well do you know Invoca integrations? Let's see!

Question 1:

Invoca integrates with:

- A. Salesforce
- B. Google
- C. Snapchat
- D. Slack
- E. All of the above
- F. A, B, and C

Question 2:

To get Invoca data into other platforms, you just put it into spreadsheets and pivot tables then export them to your tech stack.

True False

Question 3:

Customer experience teams can use Invoca to improve the online experience.

True False

Question 4:

Invoca uses the following technologies for integrations:

- A. API
- B. Webhook
- C. Flash
- D. Both A & B

Question 5:

If a new lead calls that does not exist in your system, a sales rep has to enter it into Salesforce manually.

True False

Question 6:

Invoca cannot be integrated with home-grown marketing systems

True False

Test Your Knowledge – Section 3.0 Answers

How well do you know Invoca integrations? Let's see!

Question 1:

Invoca integrates with:

- F. A, B, and C

Question 2:

To get Invoca data into other platforms, you just put it into spreadsheets and pivot tables then export them to your tech stack.

False

Question 3:

Customer experience teams can use Invoca to improve the online experience.

True

Question 4:

Invoca uses the following technologies for integrations:

- D. Both A & B

Question 5:

If a new lead calls that does not exist in your system, a sales rep has to enter it into Salesforce manually.

False

Question 6:

Invoca cannot be integrated with home-grown marketing systems

False

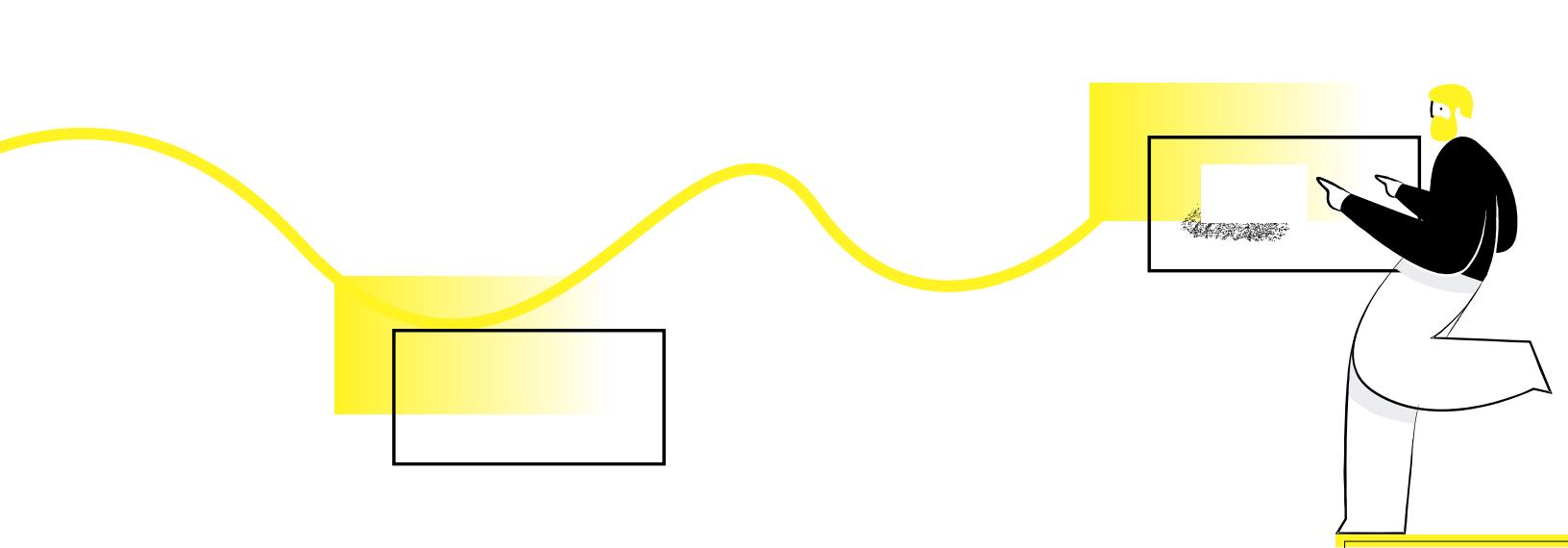


4.0:

Using Conversation Intelligence 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 conversation intelligence 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 Invoca

You know that Invoca's active conversation intelligence 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.

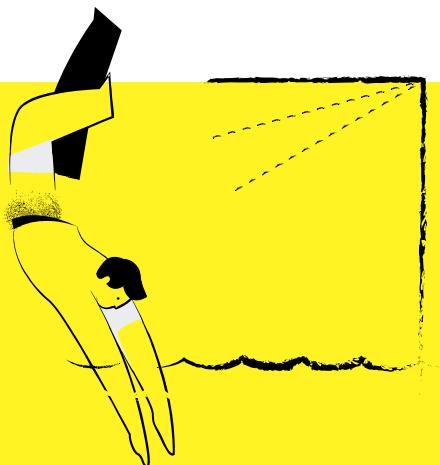
Here are the four steps to using this data to optimize your ad campaigns:

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

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

Step 2: Unify caller data across multiple sources

Step 4: Activate conversation intelligence in the rest of the marketing stack



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

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 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 call.”

Bill Denninger,
Director of Business Operations
Weitz & Luxenberg

The Invoca Javascript tag is deployed on your website using a tag manager like Adobe Launch or Google Tag Manager. No complex coding needed!

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 you can store a veritable cornucopia of relevant data. These data come in various forms:

1. Customer journey data like ad exposure and website visitation
2. First-party data, like customer records
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
5. Conversational data derived from speech analytics and other AI-based tools (more on this in 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.

Think of this like cookies or campaign data.

This is pulled from your CRM.

This comes from Invoca.

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 the 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?

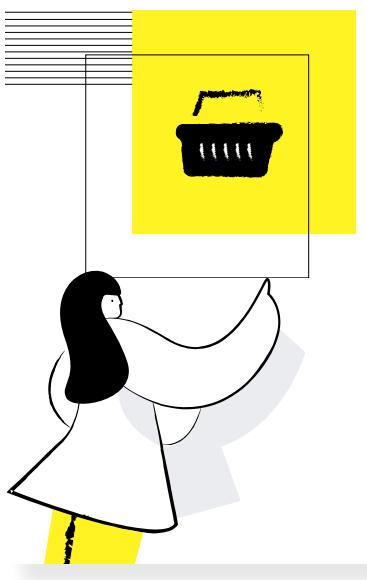
It's easy to forget that your customers are actually telling you where they are in the buying process. They're telling your call agents things like "let me call you back tomorrow when my paycheck clears," or "I'm almost ready to buy, let me check with my wife and call you back." This conversational data is 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. 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. Using Signal Discovery, you can also learn about previously unknown call topics that can help you identify and track other conversion points.

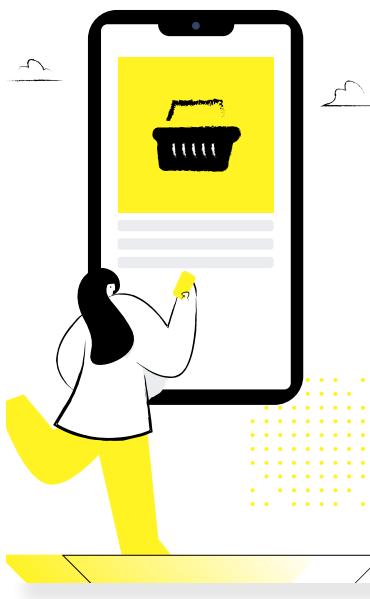
And when you understand the nature of a call, you can optimize your media for higher ROI, improve marketing effectiveness, and personalize the customer journey.

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



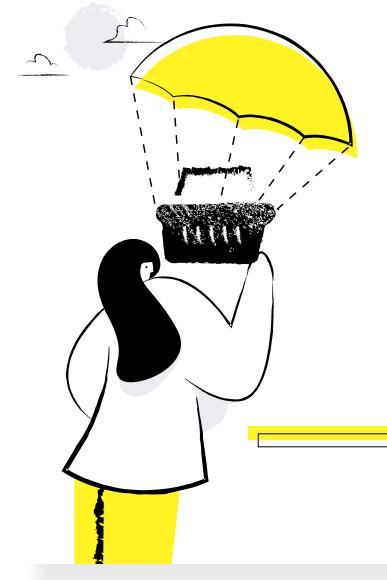
Call Drivers

- Product interest
- Promotion
- Referral



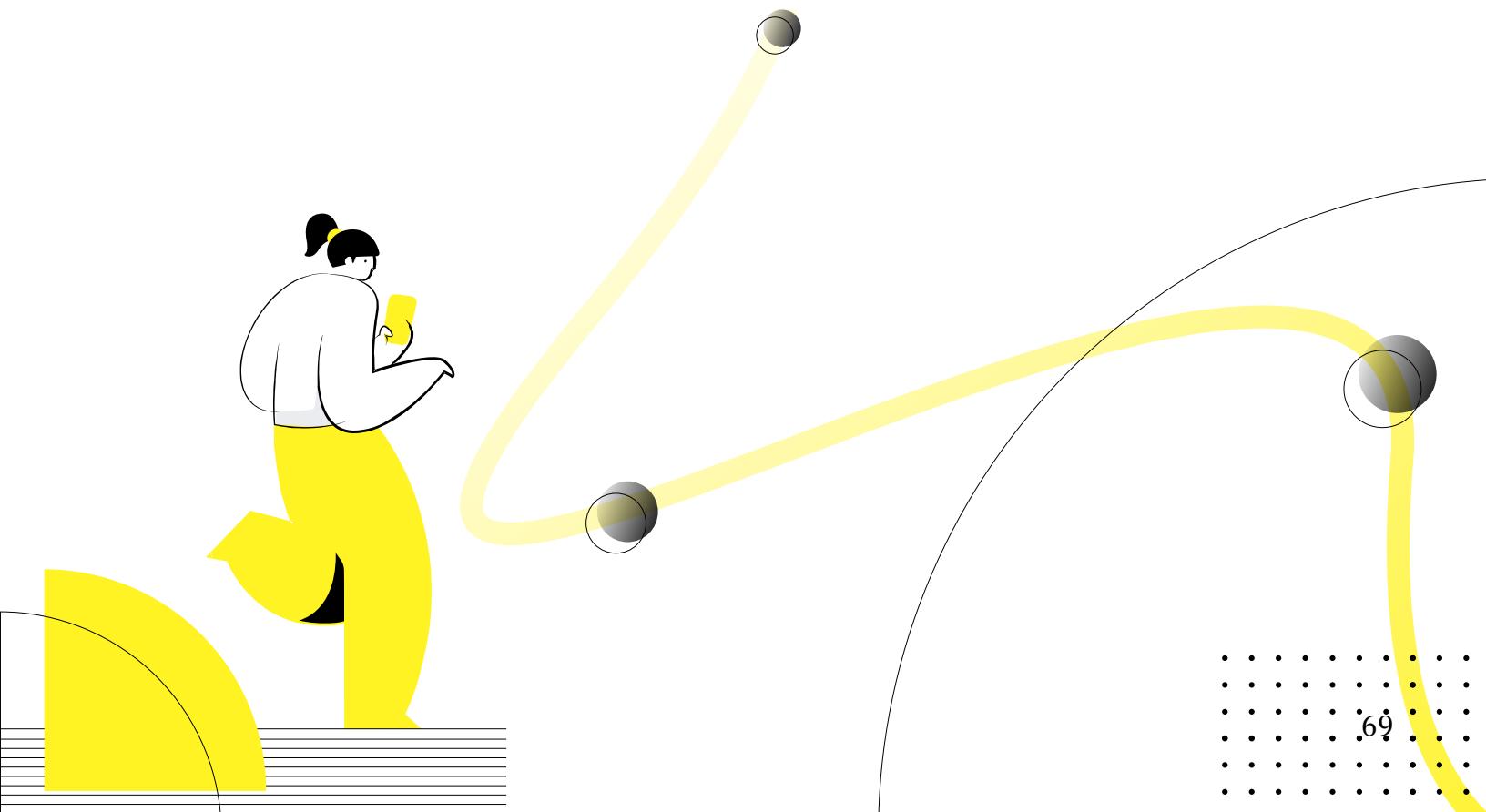
Call Behaviors

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



Call Outcomes

- Purchase/returns
- Appointment booked
- Service activation



Step 4: Activate conversation data in 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 conversation 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. Refer to section 3.0 to learn more about Invoca's martech integrations.

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

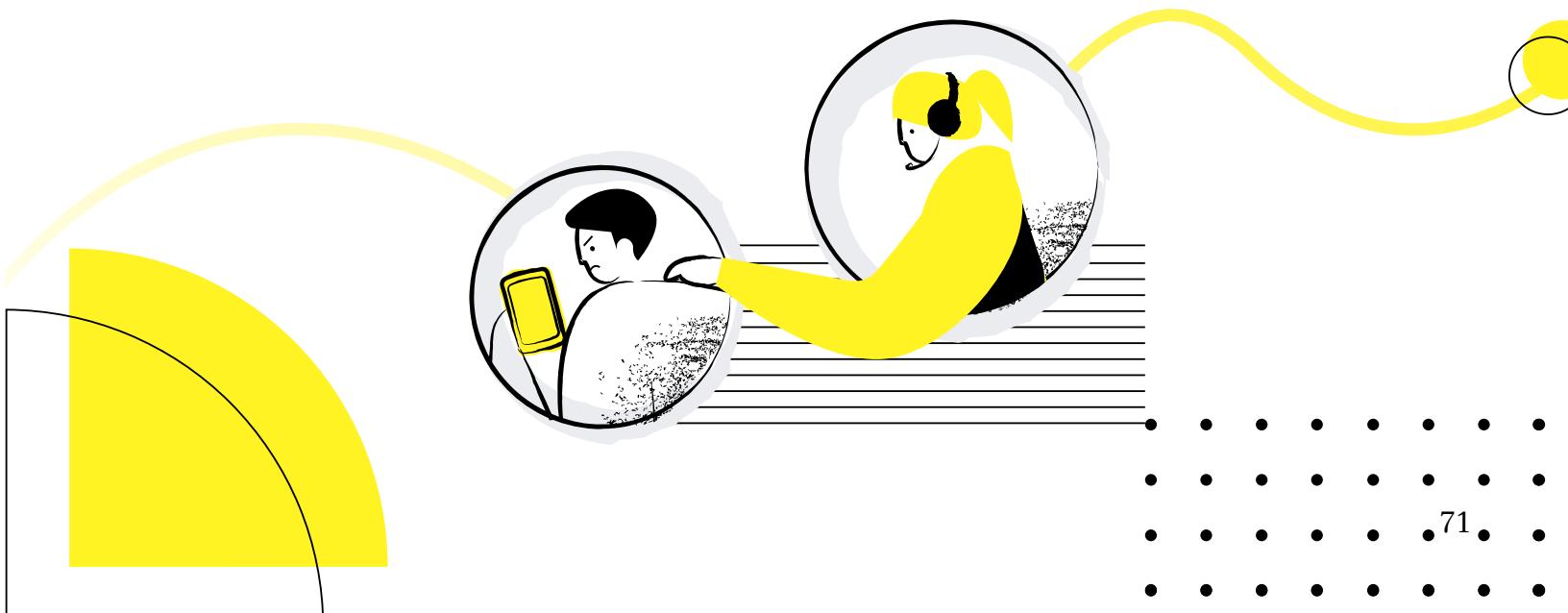
Before you skip this section because call experience seems like something that the call center folks should be worried about, first think about how caller experience can affect marketers, too.

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 a conversation intelligence solution 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, 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

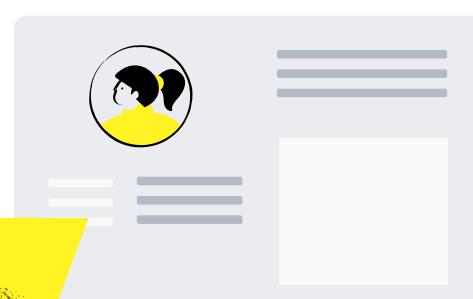
With Invoca, the call center can retrieve real-time insights about a caller, including their previous engagement history as well as the keyword and ad campaign that drove the call. This data can be used to automatically route and filter calls so callers are sent to the person or department that can best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

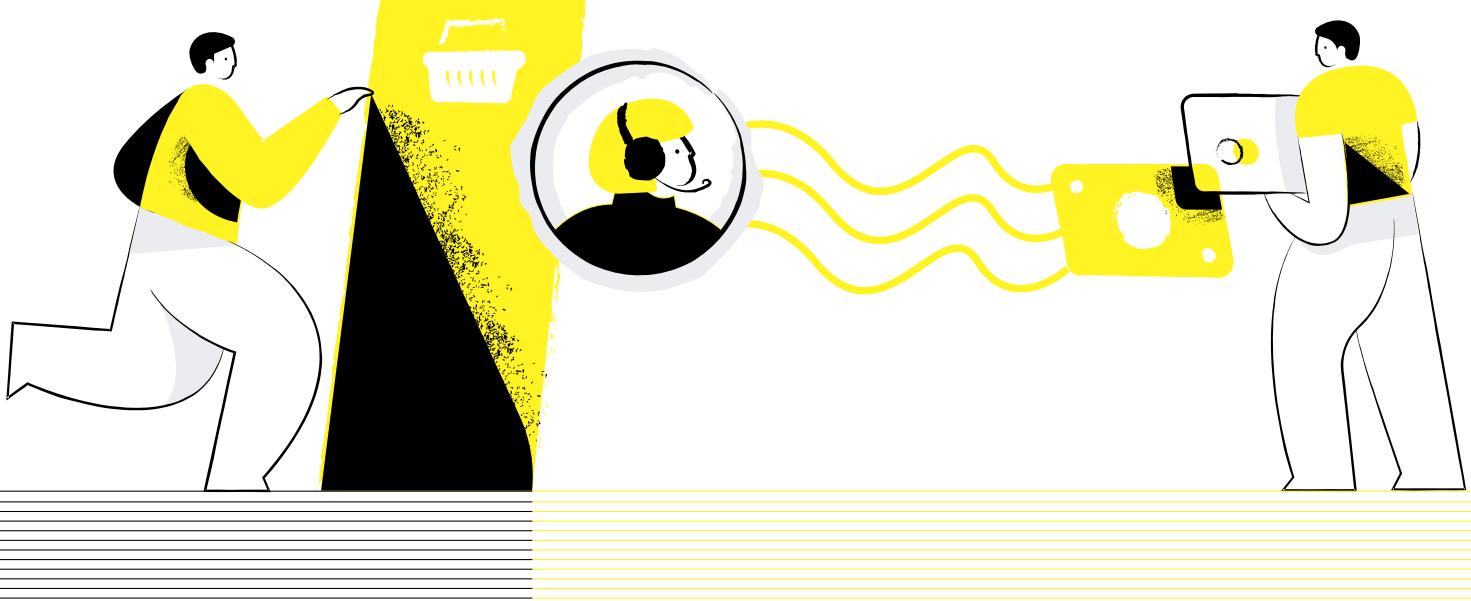
Invoca can be used to route callers to the right place.

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.





The Results of a Personalized Call Experience

Your customers don't want to be treated like a stranger every time they call your business. Research from Invoca's 2021 Buyer Experience Report found that **71% of consumers believe businesses already know why they're calling**. Today's consumers expect brands to deliver seamless online-to-offline experiences—and they believe you have the data to do it.

When you can provide a personalized experience, your customers are more confident in making a purchase. For instance, our research also found that **34% of consumers are more likely to make a purchase if their call isn't transferred**. Smoothing out the customer journey can make a huge impact on your conversion rates and customer retention, even for something as simple as routing calls to the right agent.

For example, In March of 2020, satellite broadband provider Viasat experienced a significant increase in call volume and orders as people switching to working, learning, and doing more from home needed fast, reliable broadband service.

To prioritize the highest quality leads and better serve customers, they used Invoca's advanced call routing to deflect unqualified callers from the sales contact center and route current customers directly to customer service agents.

By deflecting unqualified callers, routing current customers directly to customer care, and focusing its marketing only on its addressable markets, they were also able to **increase the handled call conversion rate by 74%**. And more conversions happening in the contact center means higher conversion rates for your marketing campaigns that are driving the calls.

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.



“ With Invoca, we're able to provide a better customer experience and stellar results for our business.”

David Salcido,
Director of Digital Marketing
Viasat

Improving the Customer Experience 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.

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.

Can use this to make sure customers don't get retargeted with discounts 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 know your customer well 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.

Test Your Knowledge – Section 4.0

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

Test Your Knowledge – Section 4.0 Answers

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 :

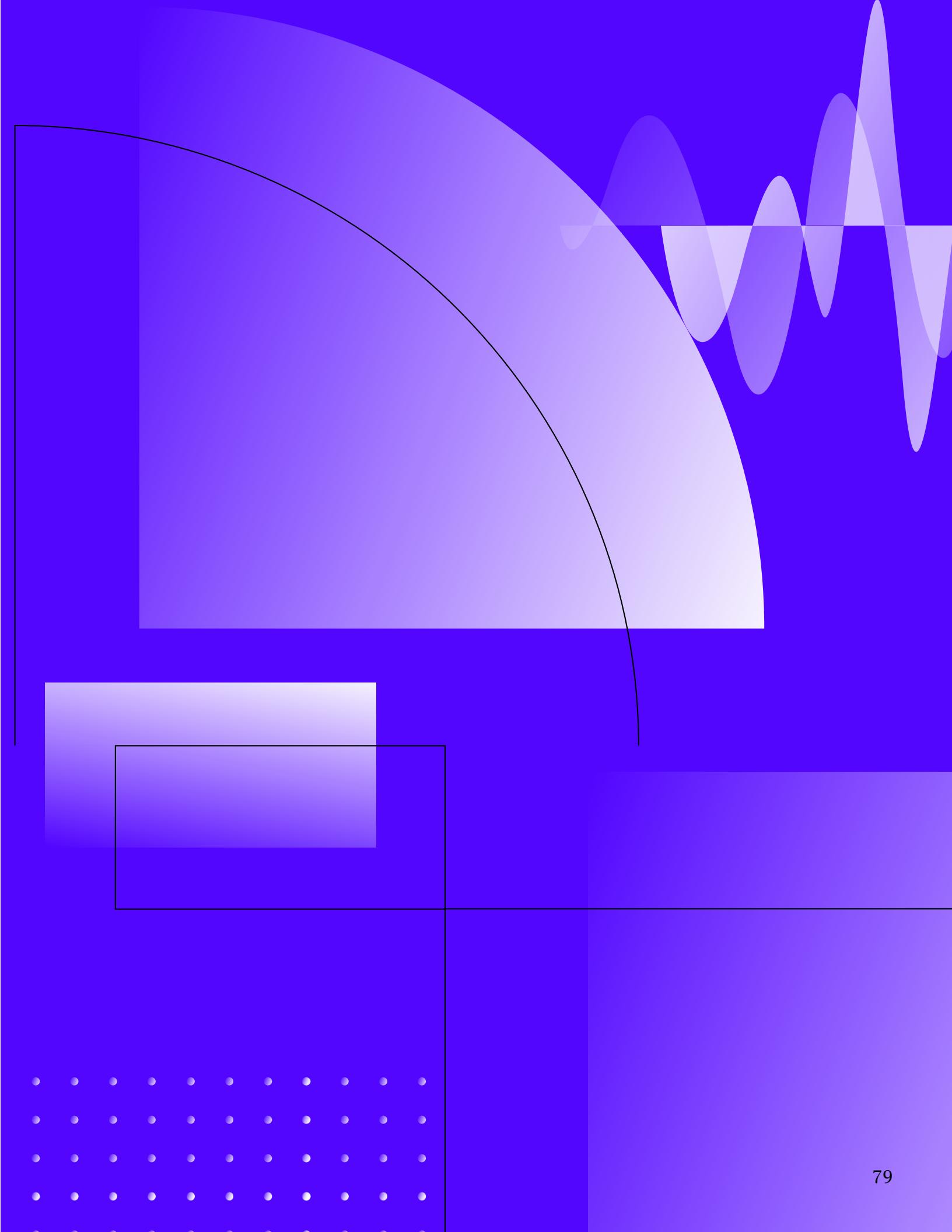
You can run out of dynamic phone numbers if too many people call.

False

Question 4:

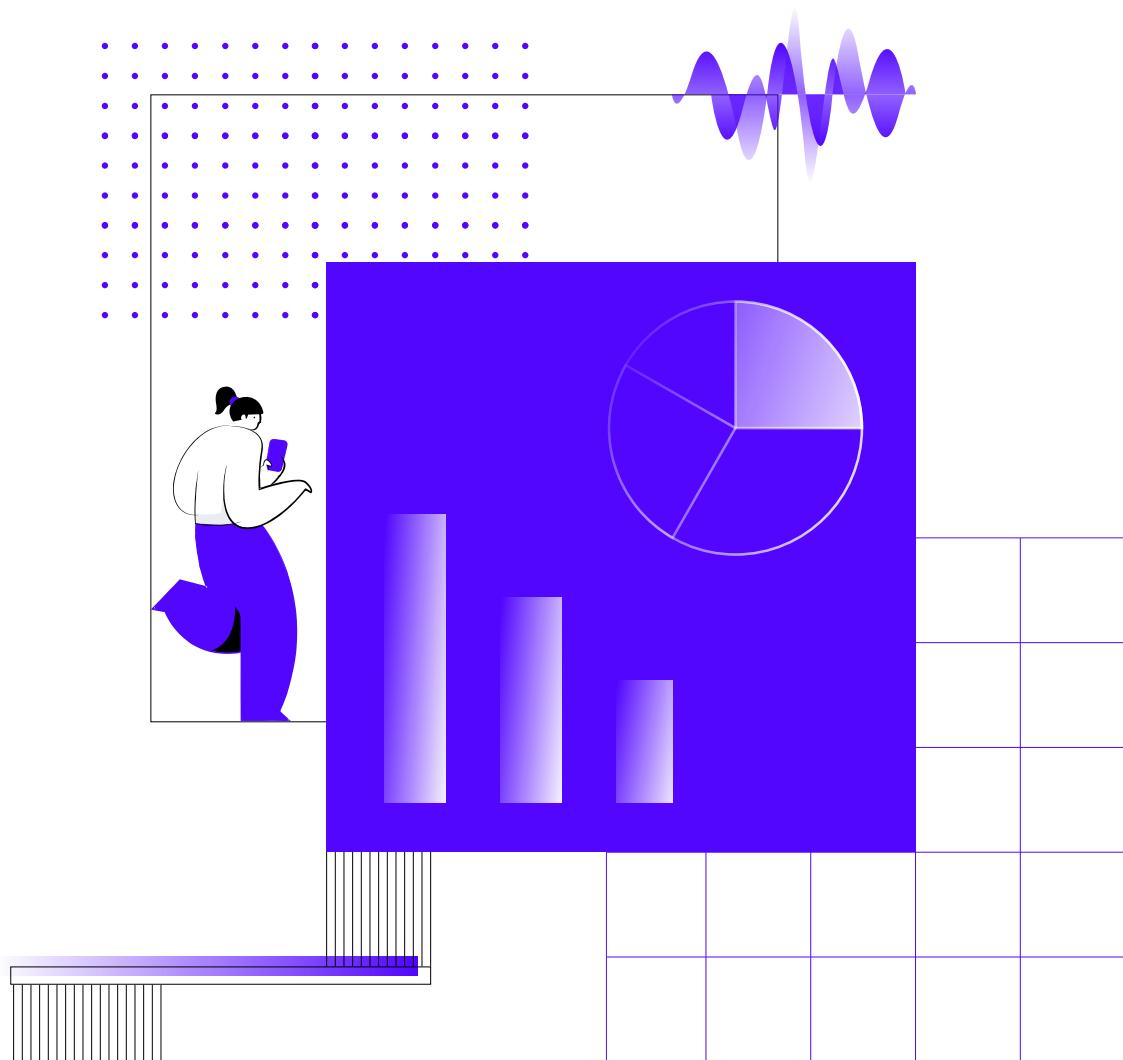
Signal AI can help you predict:

All of the above

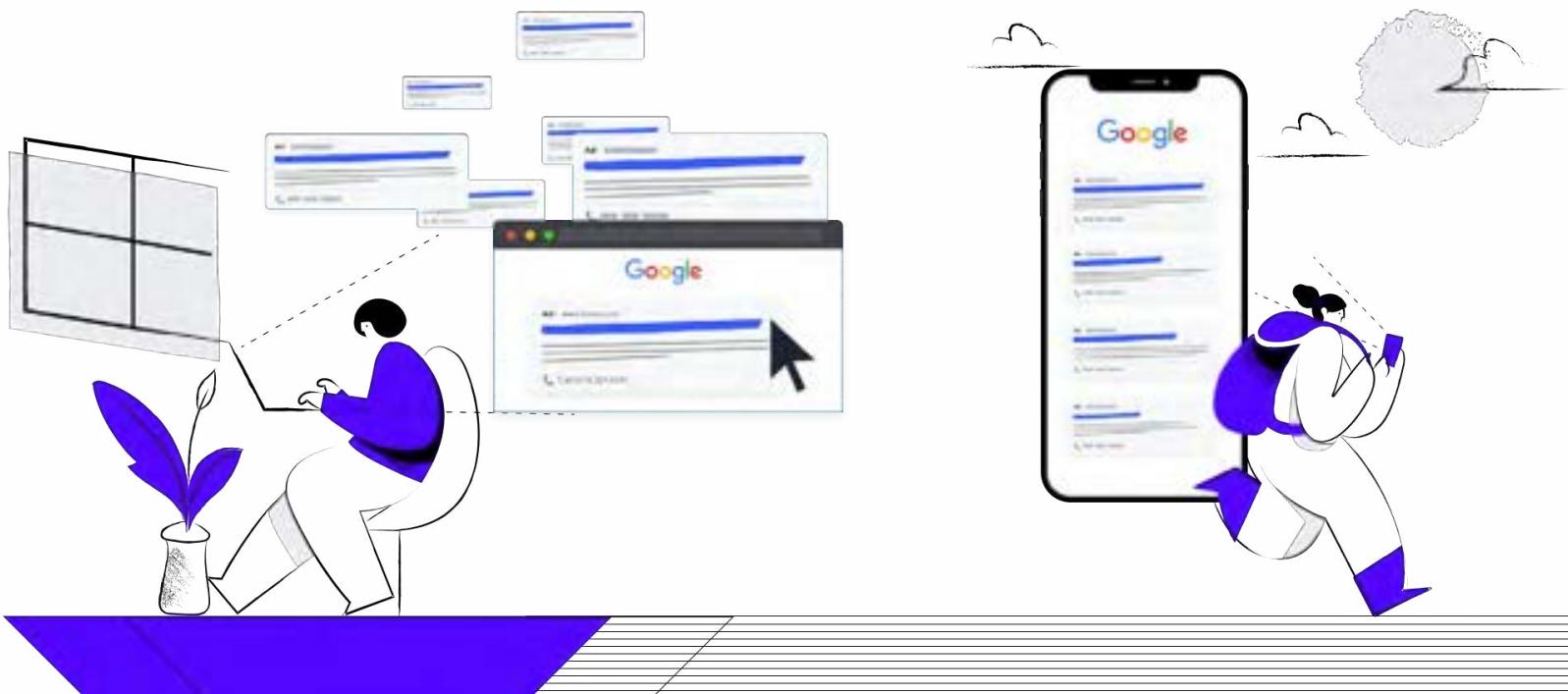


5.0:

Using Conversation Intelligence to Optimize Google Ads Performance



In this section, you will learn how Invoca works with Google Ads, how to maximize your paid media budget and reduce your acquisition costs by using Invoca with Google Ads and other paid media platforms.



Why Marketers Use Invoca to Optimize Paid Media

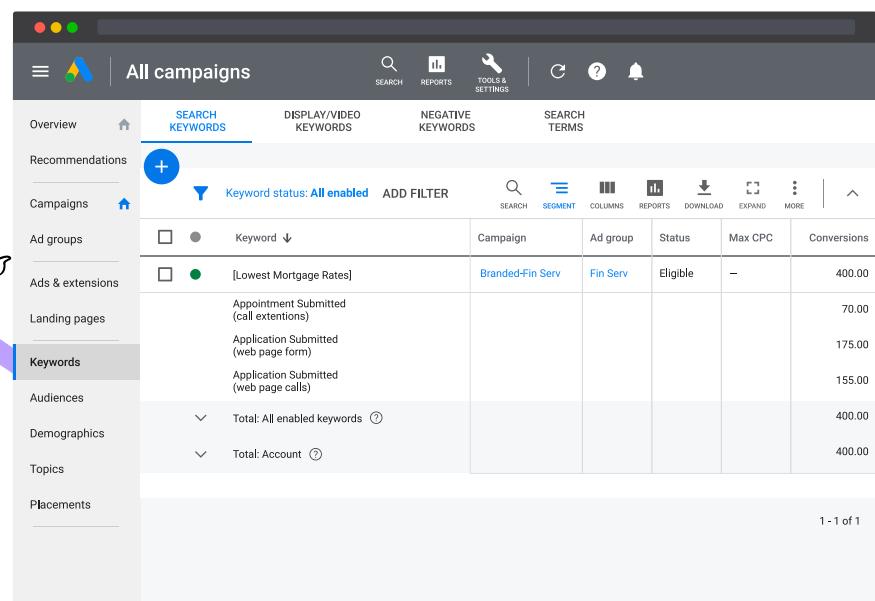
We're all experiencing tightening ad budgets, so it's more important than ever to squeeze more value out of every penny spent on digital advertising. Lucky for you, paid search optimization is one of the most common uses for Invoca.

If you read nothing else in this chapter, soak this in: Invoca helps marketers reduce acquisition costs, eliminate wasted ad spend, and increase conversion rates from paid media. That means in lean times you can acquire more customers for less money, and when things are flush, you can reallocate your savings and spend more on your most successful campaigns.

Introduction to Google Ads

Google Ads is Google's native advertising platform that's used to manage paid search, Google Display Network, YouTube ads, and products ads campaigns. It's the Big G's bread and butter and the company raked in nearly \$135 billion in revenue from Google Ads in 2019 – it also owns about 70% of the search advertising market. Considering an average 4-to-1 return on ad spend for Google Ads, that's a lot of revenue for the taking.

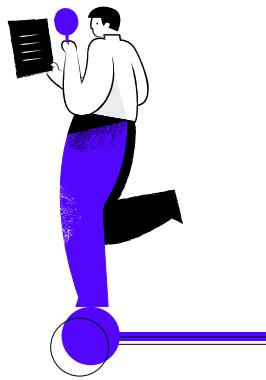
The dominance and effectiveness of the platform is the reason why we are focusing on Google Ads, specifically search ads, for this chapter. Of course, Invoca's integrations and many of the concepts herein also apply to Google Display Network, YouTube ads, product ads, as well as platforms like Microsoft Advertising, Kenshoo, Marin Software, and others.



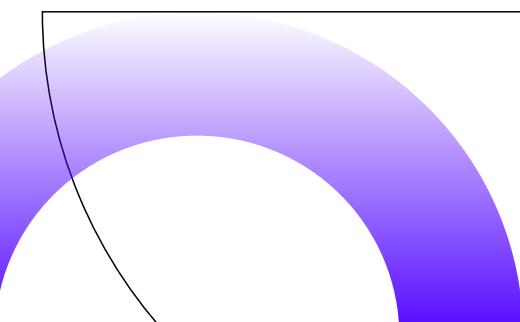
Keyword	Campaign	Ad group	Status	Max CPC	Conversions
[Lowest Mortgage Rates]	Branded-Fin Serv	Fin Serv	Eligible	–	400.00
Appointment Submitted (call extensions)					70.00
Application Submitted (web page form)					175.00
Application Submitted (web page calls)					155.00
Total: All enabled keywords					400.00
Total: Account					400.00

Google Ads Glossary

If you are just getting started with paid search, there are some key terms that you'll need to know. This will help you wade through the alphabet soup that follows.



- **Keywords** – Specific words relevant to your product that you want to appear in search queries for.
- **Queries** – The searches that your keywords appear in.
- **Bids** – How much you are willing to pay per click for keywords.
- **SERP** – Search engine results page. To “appear in the SERP” means you’re on the first page.
- **CPC** – Cost per click; how much it costs every time someone clicks your ad.
- **CPA** – Cost per acquisition; how much it costs to acquire a customer.
- **SEM** – Search engine management, aka paid search.
- **SEO** – Search engine optimization, aka organic search.
- **ROAS** – Return on ad spend.
- **Account > Campaign > Ad Group > Ad Hierarchy in Google Ads** – Campaigns have budgets, Ad Groups target specific keywords, Ads contain the copy and structure which is presented on the SERP.
- **Branded vs non-branded search terms** – Whether or not your trademarked brands are in the keyword.
- **Bidding Strategy** – Bidding strategies in Google Ads can be based on CPA, CPC, ROAS, or hybrid models. Bidding can be done manually or via Google’s automated Smart Bidding algorithm.
- **Call extensions** – A feature in Google Ads that allows searchers to call directly from the ad. Frequently referred to as “click to call.”
- **Call-only ads** – Only available on mobile ads, these ads only allow searchers to call by clicking, not to navigate to your website.
- **Conversion Actions** – User-defined events to track any type of action a customer may take.



What You Can (and Can't) Do with the Google Ads Platform

You can manage all of your Google Ads-related duties through the Ads platform including setting up ads, setting bids and bid strategies, budgets, and reporting. You can now also manage Google-owned display ads and YouTube video ad buys in Google Ads. You cannot, however, manage your other ad networks like AdRoll or Microsoft Ads in Google Ads. It can't do everything!

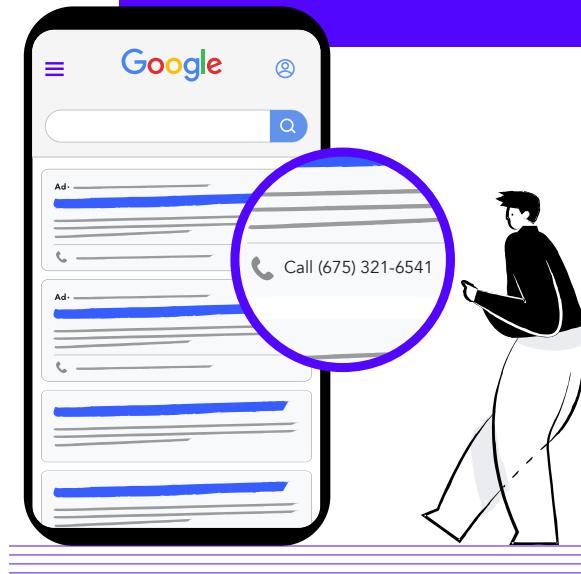
Many companies use Google Ads to drive inbound sales calls to their call centers. In fact, over **80 million calls are driven by Google search ads every month.**

Google Ads analytics can't tell you if a sale actually happened on a call. That's where Invoca comes in!

Google Ads Drive Customers to Call

Consumers who click on search ads aren't just going to websites, they're clicking to call businesses, too. On average, over 80 million calls are driven from Google Search ads each month.

Google, Conversational Sales: Driving & Measuring Calls, June 2019



However, one of the things that Google Ads does not do well is giving marketers attribution for sales that happen on the phone when the call originated from paid media like paid search ads. Its native reporting can provide some basic data, like how many times the number in the ad was called and, in some cases, if the call connected, and call duration. However, Google has no way of telling you what the nature of the call actually was. Was a sale made or appointment set? Was it a customer service call? Are people calling to buy motorcycles but you sell motorhomes?

When you are trying to optimize your ads against inbound call outcomes, this is a big problem. You could be wasting a lot of money on underperforming keywords and not putting enough budget behind the ones that work. Worse yet, you could be completely misunderstanding what's performing since you're just counting conversions based on call duration. All the while, you're overestimating your CPA and underestimating your ROAS, which makes you look bad. And we're not going to have that.

Invoca solves the attribution problem and gives you the data you need to feed to Google to make your campaigns more efficient, effective, and agile. Here's how it works.

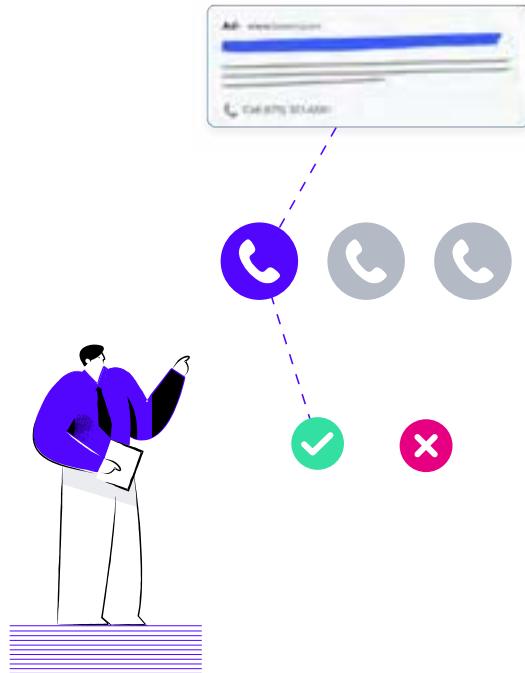


How Invoca Works with Google Ads

Invoca enhances the reporting and optimization capabilities of Google Ads by delivering conversion data from actions that happen on the phone to the Google Ads platform in real time.

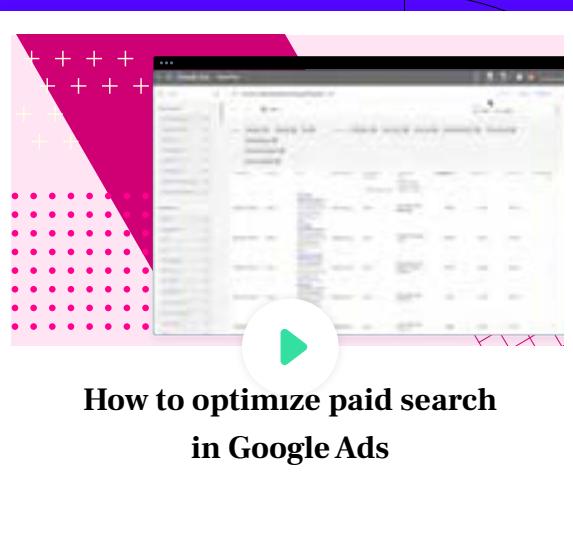
When someone clicks on your phone number in a paid search ad, or calls your business from a landing page that they found via a paid search ad, Invoca instantly captures data like the marketing campaign and Google Click ID (GCLID), enabling you to report individual call events and conversions back to Google Ads. Our integration offers the most reliable and precise method to get keyword visibility for Google paid search ads.

Through this integration, Invoca is able to not only tie the individual call but also the actual call outcomes to your campaigns at the keyword level. No matter what call outcome you want to track, such as a sale, no sale, appointment set, quote given, product mentioned, service call — whatever matters to your business — the Invoca platform can track and report it to Google Ads.



Invoca makes it possible to tie your ads back to the results of phone calls on a 1-to-1 basis.

Watch this video to see it in action.



Using Invoca Signals to Measure and Report Conversions in Google Ads

In Invoca, Signals are how individual calls are classified. This gives you the ability to segment based on call outcomes — aka classifications — that are meaningful for your business. For example, if you sell car insurance, you may want to know which calls resulted in a quote being requested or a policy being purchased. You do that by creating a Signal that looks for those specific outcomes.

How Signals fit into marketing measurement

When it comes to measuring marketing success, what metric is important to your business? Do you measure cost per sale, cost per lead, or cost per quote? To demonstrate how Signals work for marketing measurement, we'll use cost per acquisition, but you can fill in virtually any metric you use to measure success.

You're probably not measuring your CPA accurately without call analytics data.

Benchmark

Measuring digital conversion only

50	Online conversions
\$10,000	Ad spend
\$200	CPA (online only)*

*Incomplete data: Does not include call conversions

Measure

Combine digital & phone conversions

\$200	CPA (baseline)
50	Online conversions
50	Offline call conversions
\$10,000	Ad spend
\$100	True CPA (based on total conversions)
-50%	% change CPA with Invoca reporting*

* No net change in business strategy or spend at this stage

Optimize

Optimizing bid strategy for online and offline conversions

\$100	True CPA (baseline)
50	Online conversions
100	Offline call conversions*
\$10,000	Ad spend
\$66.67	Improved CPA
-33.33%	% improvement in CPA with Invoca and Google's Smart Bidding

* Increase qualified calls by favoring keywords/bids that drive converting calls

Without Invoca, marketers are typically only tracking online conversions, meaning conversions that are completed entirely online through their website. In this example, let's say a marketer is spending \$10,000 a month on ads and reports driving 50 online conversions with that ad spend. This means they would have a \$200 CPA. That might seem high or low depending on your business, but let's not get too caught up in the exact numbers.

This marketer then implements Invoca and starts measuring calls. Now they are able to track online conversions from their site as well as conversions that happen over the phone. By adding in the conversions that happen over the phone, they find out that this ten thousand dollar ad spend is actually driving 100 conversions. Without making any other changes, this cuts their measured CPA in half.

This is what we call your "true CPA." From there, this marketer starts optimizing marketing spend based on channel and campaign level success. After these optimizations, they see their true CPA drop another 33%.

Your true CPA is online conversions + offline conversions % ad spend. Many marketers don't account for offline conversions, so they're overestimating their CPA.

It gets really exciting when you begin refining your ad spend based on the outcome data obtained through Signals. As you continue to optimize based on Signal data you can see improved KPIs week over week. And, yes, you get full bragging rights as you report on improved results and spending efficiency.



Setting Up Invoca Signals for Accurate Marketing Measurement

Setting up effective Invoca Signals is mission-critical for accurate performance measurement. Signals provide closed-loop attribution by tying the call outcome to the exact ad or web session that drove the call, and the customer who made the purchase. Achieving accurate conversion measurement ultimately allows you to see what's working and what isn't, enabling you to optimize your efforts and drive better results.

Let's look at the three different ways you can classify and segment calls with Signals:

Signal AI



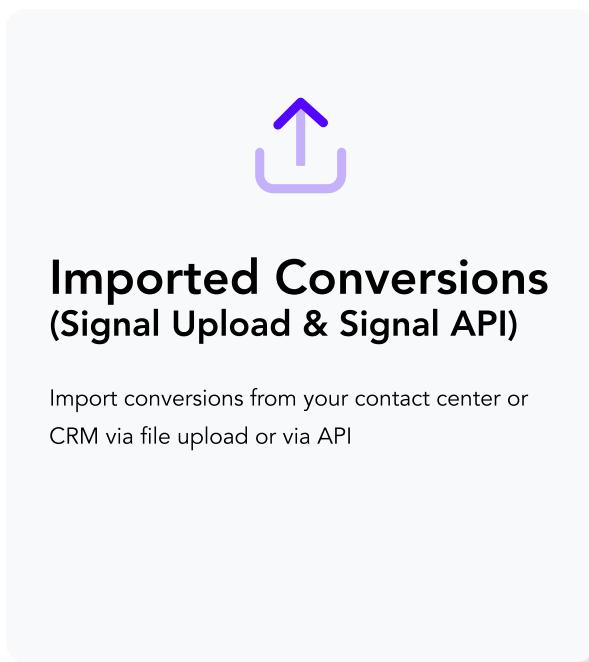
Predictive Analytics (Signal AI)

Detect call conversions, product interest, call drivers and more using custom or pre-trained AI models

Invoca Signal AI is the easiest and most flexible way to measure your call conversions. Signal AI:

- Reports conversions in real time.
- Can also classify non-conversion call topics like customer service calls, interest in products, and more.
- Allows for fast implementation and the simplest optimization.

Imported Conversions



Importing conversions from your revenue tracking system is an accurate way to create closed-loop attribution. Invoca offers three primary ways to do this:

Salesforce Sales Cloud integration

- Real-time, as soon as an opportunity is set to “closed-won”
- Precise 1-to-1 match of conversion to caller

Signal API

- Real-time
- Precise 1-to-1 match of conversion to caller

Signal File Upload

- No integration or coding needed
- Less than 100% call record match

Rule-based Signals

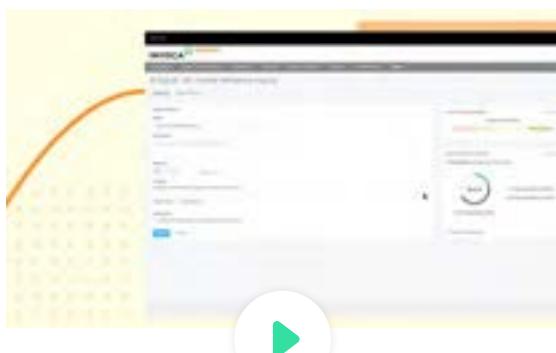


Rule-Based Analysis (Signal Builder)

Classify callers in real time based on:

- Site data
- Call duration
- Spoken keywords
- and more...

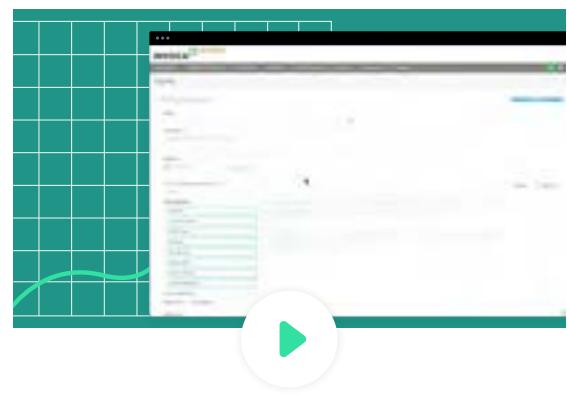
**Watch these videos
to see how it works.**



**Detect Call Topics and
Outcomes with AI-Powered
Conversational Analytics**

For businesses that have a specific agent script when a purchase is made or appointment is set, rule-based Signals based on spoken keywords can also be used.

- Easy-to-implement
- Real time
- Sometimes prone to false positives
- Can also be used to segment calls based on caller type (e.g. existing customer vs. new customer), competitors mentioned, topics discussed, and more.



**Classify and Segment Calls
with Rule-Based Call Analytics**



How to Use Invoca to Optimize Keyword Bidding in Google Ads

How does Invoca data integrate with Google Ads data? When a customer clicks on a call extension, click-to-call ad, or clicks through a paid search ad and places a call from a phone number on your website, Invoca automatically ties the keyword and campaign data to that phone call. After the call is complete, an Invoca Signal sends the conversion data from the call to Google Ads, all in real-time.

As you may know, Google offers you the option to manually adjust bidding or to use automated Smart Bidding to optimize programmatically. Here's how to use Invoca to enhance your Smart Bidding and manual bidding campaigns in Google Ads.

Google Smart Bidding Explained

Google's Smart Bidding is a subset of its automated bid strategies that use machine learning to optimize for conversions or conversion value in each and every auction—a feature known as “auction-time bidding”. You can set your Smart Bidding strategy to match your goal, whether that is target CPA, Target ROAS, maximize conversions, maximize conversion value, and Enhanced CPC (ECPC).

Why marketers use Smart Bidding

There was a time when marketers were reluctant to hand the keyword bidding reins over to Google's algorithm, and some continue to do it manually. But when you are dealing with hundreds or thousands of auctions, it's tough to keep up with all of them manually and make adjustments in real time.

Though Smart Bidding has its advantages, remember that **you can't just set it and forget it**. You have to monitor the results and keep a close eye on your spend because automatic bids can overrun your budget or fail to meet your ROI targets. What looks optimal for Google's algorithm may not meet your expectations.

Smart Bidding is pretty smart, but you still have to keep an eye on the results to make sure they meet your goals.

Who is Smart Bidding for?

You don't have to be a huge enterprise or agency running thousands of auctions to take advantage of the benefits of Google Smart Bidding. Smart bidding can optimize based on data from all of your campaigns, so even new or smaller campaigns without data of their own may see increased performance.



How Invoca Enhances Smart Bidding Performance

Since the Smart Bidding algorithm uses conversion data to help inform its decisions, if you're only feeding it data from ad clicks, it's only half as effective as it could be.

Invoca's Google Ads integration allows real-time conversion reporting to Smart Bidding, so the Google algorithm can adjust your auctions on the fly according to what keywords are driving results over the phone.

This is how many of our customers end up getting big results. For example, eHealth used the integrations with Google Ads and Adobe Experience Cloud to optimize their paid media against events that are happening on the phone, resulting in a 20% decrease in CPA and a 20% increase in conversion rates — just by feeding Invoca data to Google's Smart Bidding algorithm. They were also able to realize up to 60% reductions in the cost of acquisition for click-to-call campaigns.



“ When our click-to-call ads converted, we had limited visibility into conversions at a meaningful level, making it extremely difficult to scale. When we implemented Invoca for these campaigns, we were able to drive down CPAs by upwards of 60%.”

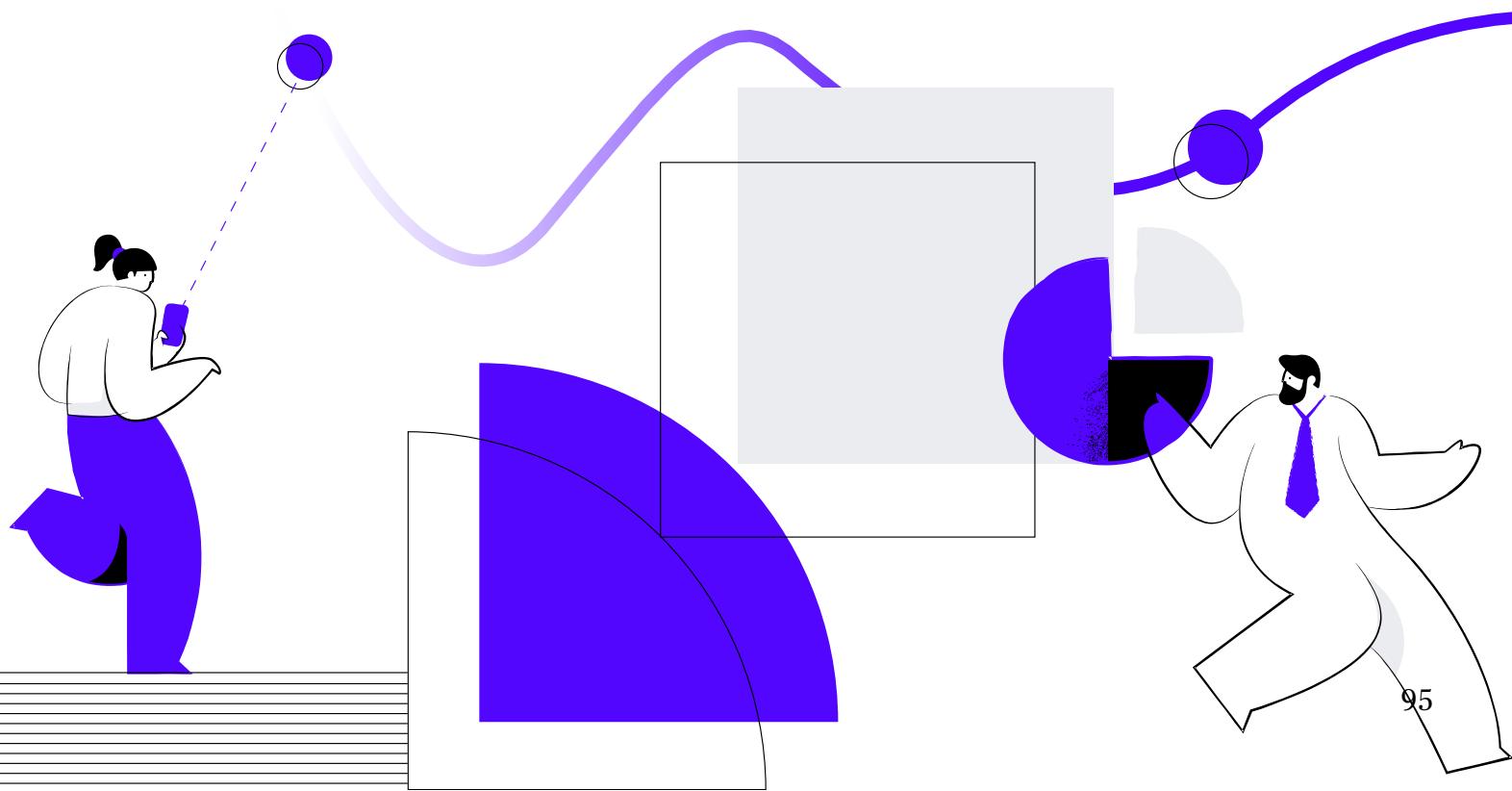
Will Guimont,
VP Analytics and Reporting
eHealth

How to Use Invoca to Optimize Google Ads Manual Bidding

Again, automated bidding is not for everyone and there is nothing wrong with optimizing your keyword bids manually. But just like with automated bidding, if you are not using conversion data from phone calls to optimize your keyword bids, you are probably wasting a significant portion of your budget on underperforming keywords and not spending enough on the ones that drive sales.

How Invoca optimizes manual bidding performance

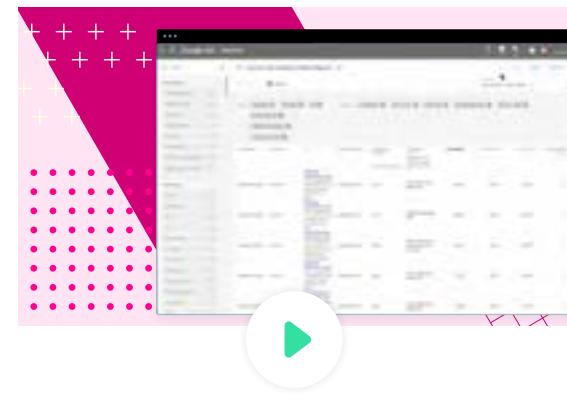
Invoca allows you to get conversion data from phone calls reported to Google Ads in real time for manual bidding optimization. You'll see conversion tracking data in Google Ads right beside your click tracking data. By pushing your Signal data into Google Ads, you can measure conversion actions, understand keyword-level attribution, and make adjustments to your bids accordingly.



Setting Up the Integration and Measuring Success

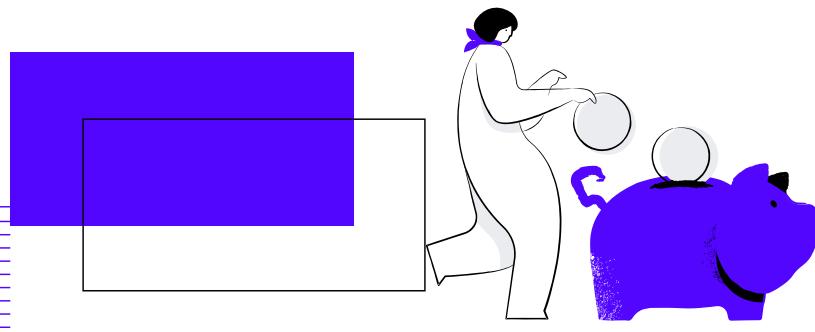
We recommend sticking with whatever method you are currently using when you first implement Invoca. This will allow you to establish a baseline and measure Invoca's impact before you shift to automated bidding or make other significant changes to your bidding strategy. It might be tempting to switch to Smart Bidding right away or start making optimizations when the call data starts flowing in, but having a clear baseline will be imperative when you are evaluating your success. Using data to show improvements in your KPIs helps tell the story of the transformation you are driving.

Don't make any changes to your bidding strategy right away. Establish a baseline first so you can track your success.



Watch this video to learn more about how to set up the Google Ads integration with Invoca, how reporting works, and how to measure your success.

How to Optimize Your Google Ads Integration



How Invoca Helps You Maximize Your Paid Search Budget

When budgets get tightened, the need for accurate and timely marketing measurement becomes even more important. If a marketing program can't be explicitly tied to business impact, how can you be sure it's helping your KPIs? More importantly, how can your boss be sure that what you're doing is driving revenue?

With Invoca, digital marketing leaders can stop the guesswork and see all of their online and offline conversions side-by-side, helping them eliminate waste and reduce acquisition costs. In fact, [recent independent research](#) found that Invoca helps customers optimize their paid search campaigns by 25%, enabling \$1.4 million in annual savings.

Enable true CPA measurement

As we showed in fig.1 above, in the “before” scenario when measuring online conversions only, the marketer understands their CPA to be \$200 based on 50 total conversions. When they incorporate accurate call conversions — the “after” scenario — they get visibility into the additional 50 conversions that happened by phone, increasing their total conversions to 100 and revealing a true CPA of \$100.

Through Invoca's [Google Ads integration](#), marketers can create that sweet, sweet closed-loop attribution across all conversion types, tying them directly back to their PPC campaigns on a 1:1 consumer level. With accurate measurement, organizations finally achieve visibility into the actual business impact of their campaigns and understand their true CPA.

Target More Cost-Effective Search Keywords and Ad Placements

With visibility into their true CPA, digital marketers are equipped to begin identifying both high-performing and cost-effective tactics that can further reduce their acquisition costs.

For example, cable and internet provider Frontier Communications was able to reduce cost per sale by 58% by using Invoca to hone in on keywords that were more effective and stop wasting valuable marketing funds on those that were underperforming.



“ Invoca is a key marketing enabler for us and it helps us understand the changing dynamics of our market.”

Bryan Flores,
AVP for Media and Analytics
Frontier Communications



58%

decrease in cost-per-sale



150%

decrease in cost-per-lead



60%

decrease in cost-per-sale

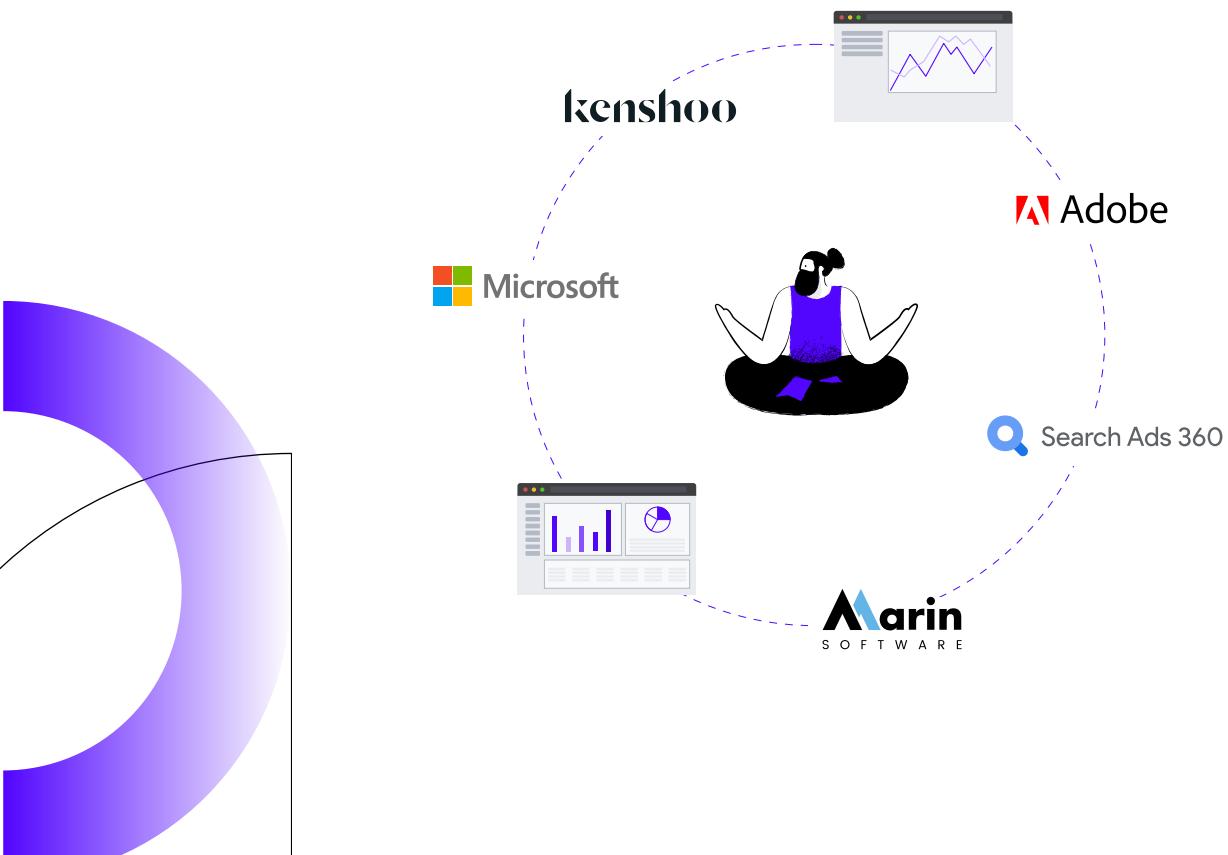
Suppress Ads to Converted Customers

Ad suppression is a key tool in the digital marketer's kit to eliminate wasted ad spend by ensuring that they aren't serving (and paying for) ads shown to existing or recently-acquired customers. However, this can become a challenge if those conversions are happening offline.

By tracking all call conversions with Invoca and pushing this information into ad platforms like [Google Marketing Platform](#), [Kenshoo](#), or [Marin Software](#), marketers can automatically suppress ads to those who have already converted over the phone. This not only reduces wasted ad spend, it prevents you from annoying your new customers with irrelevant ads.

Other Ad Platform Integrations

Don't use Google Ads? No problem! You can work in your preferred ad platform with Invoca integrations. Microsoft Ads (aka Bing), Search Ads 360, Kenshoo, Marin, Adobe Ad Cloud, Adroll — virtually any ad platform you are using can be integrated with Invoca. See the integrations section to learn more about all of our integrations.



Test Your Knowledge – Section 5.0

1. You need to know how many offline conversions your digital ads are driving to know your true CPA.

True False

2. Invoca can help optimize your paid search budget by:

- A. Identifying underperforming keywords
- B. Suppressing ads to converted customers
- C. Google provides a discount to Invoca users
- D. A and B

3. It's okay to let Google Smart bidding run on its own after you set it up.

True False

4. Invoca data cannot be used to optimize manual keyword bidding.

True False

5. Signal AI:

- A. Reports conversions to Google Ads in real time
- B. Classifies non-conversion call topics
- C. Is the easiest call classification method to optimize
- D. All of the above

Test Your Knowledge – Section 5.0 Answers

1. You need to know how many offline conversions your digital ads are driving to know your true CPA.

True

2. Invoca can help optimize your paid search budget by:

D. A and B

3. It's okay to let Google Smart bidding run on its own after you set it up.

False

4. Invoca data cannot be used to optimize manual keyword bidding.

False

5. Signal AI:

D. All of the above

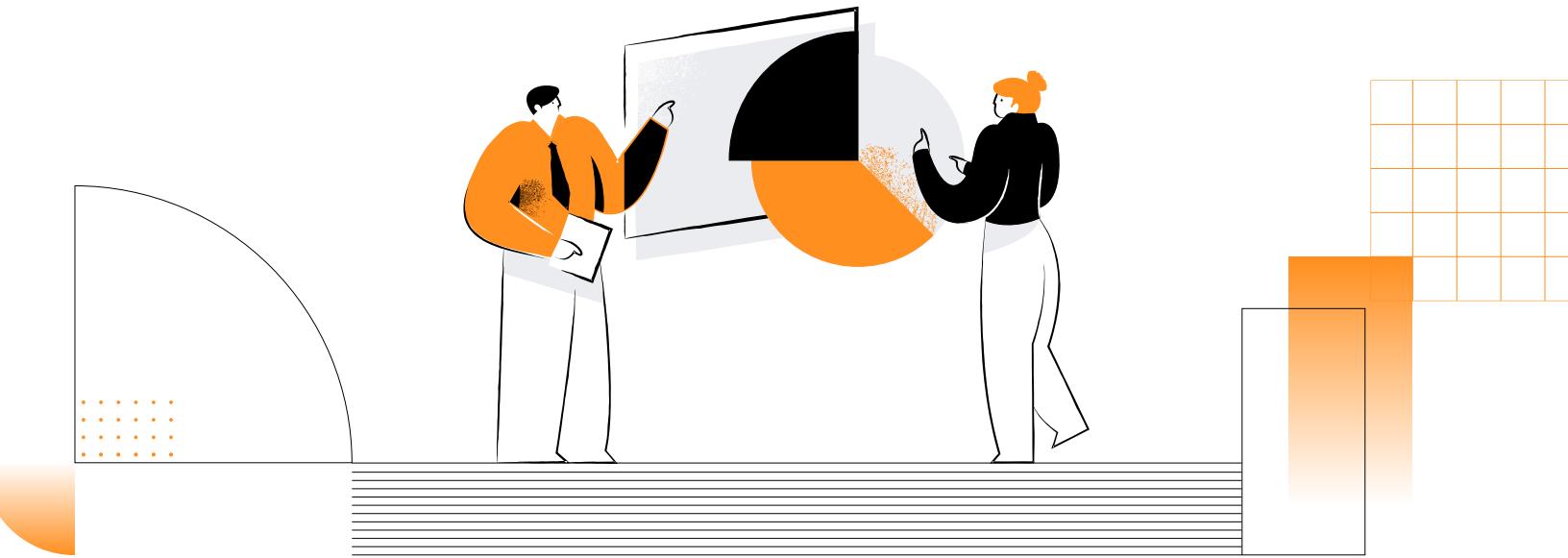


6.0:

How to Get Buy-In for Invoca in Your Organization



This section provides all the assets and advice you will need to get buy-in for adopting Invoca active conversation intelligence in your organization.



Getting the 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 tech 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 Ultimate Guide to Conversation Intelligence 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.

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.

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 calls that converted.

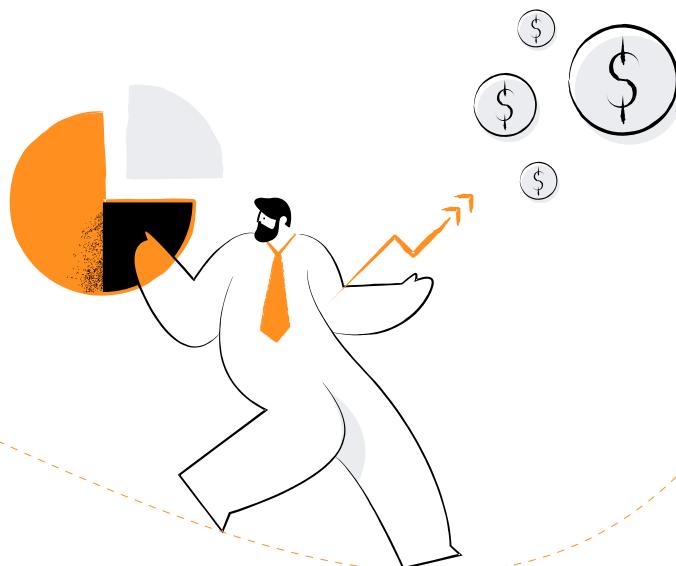
Percentage of revenue driven by phone calls

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 understands.

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 conversation intelligence 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. 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 understands.

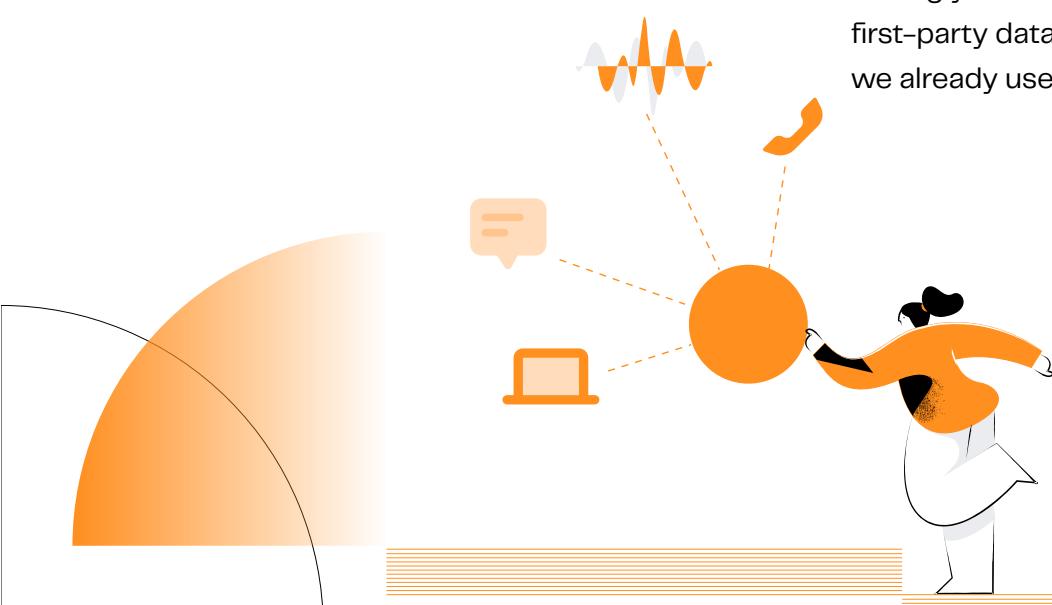
Marketing

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 conversation intelligence 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.

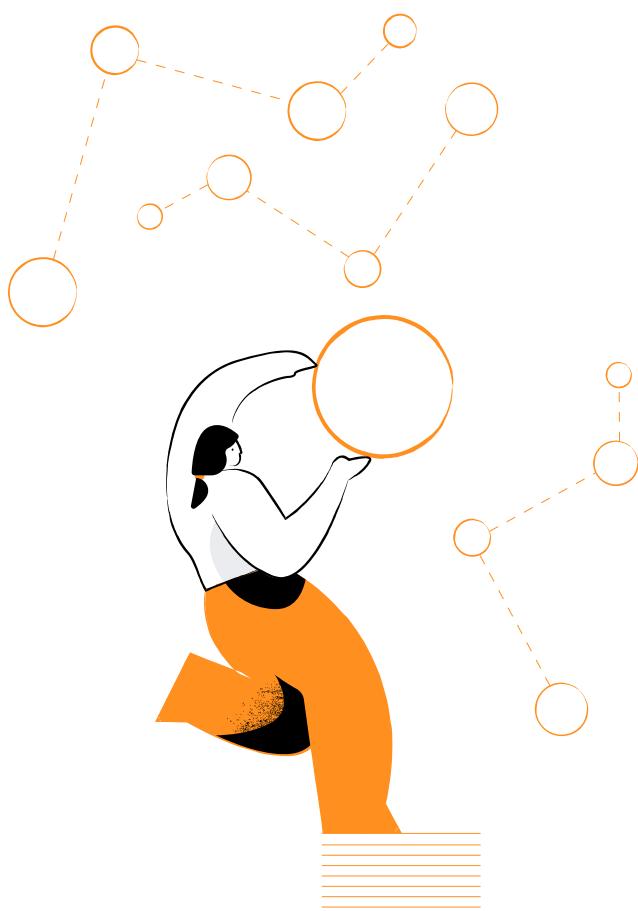
Analytics

Concerns:

I don't have adequate data to analyze 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

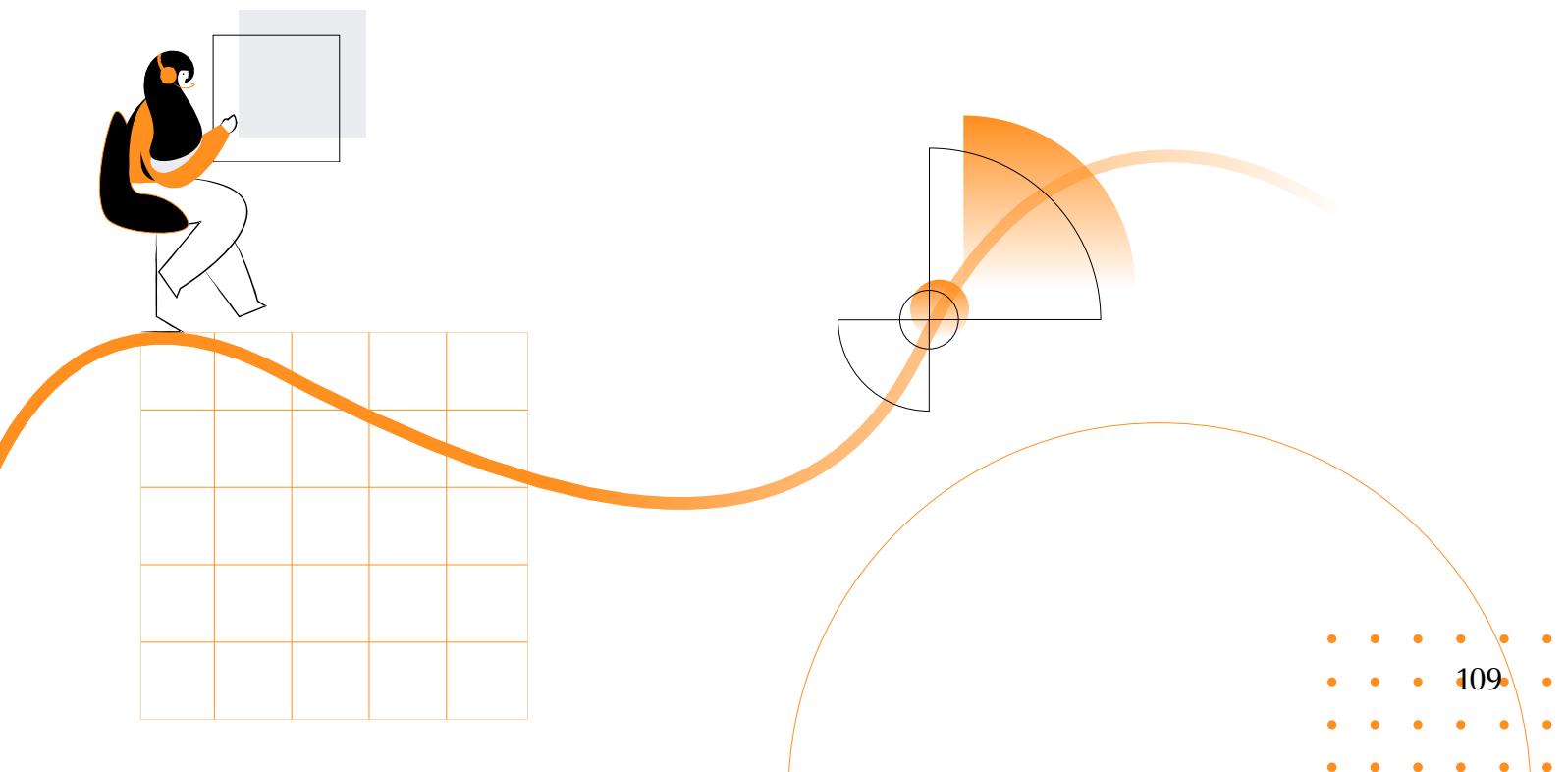
Concerns:

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.

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

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 mean that we can more accurately optimize ad campaigns, reducing CPA and increasing conversion rates.



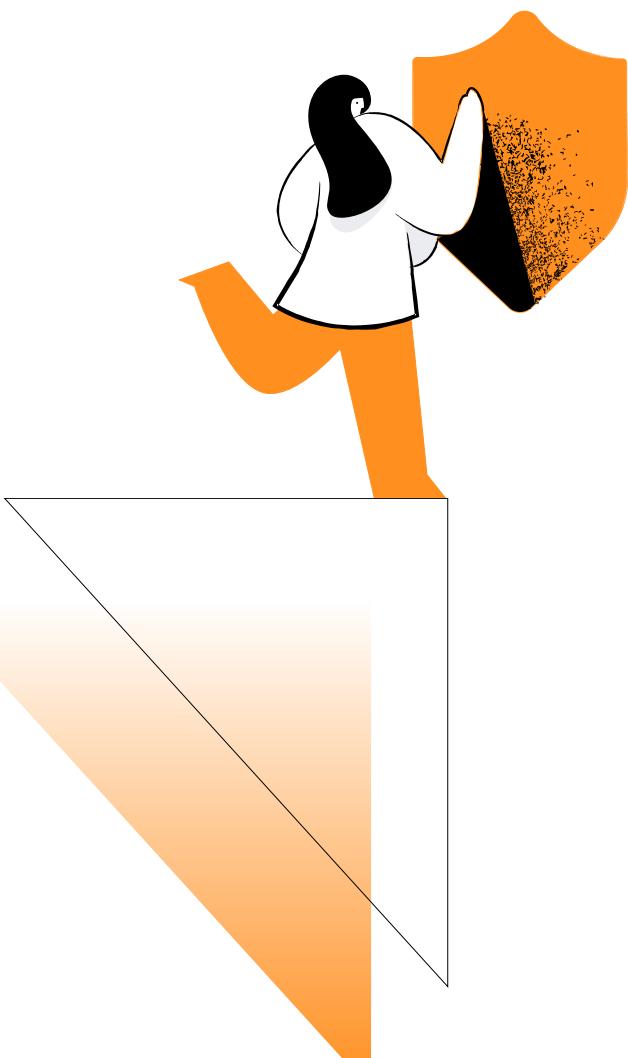
IT & Web Development

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 SOC 2 Type 2, HIPAA, GDPR, CCPA, 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.

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

How Invoca Addresses:

Invoca has a proven track record of ROI for enterprise brands like LendingTree, DISH Network, Mutual of Omaha, Orkin, 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.



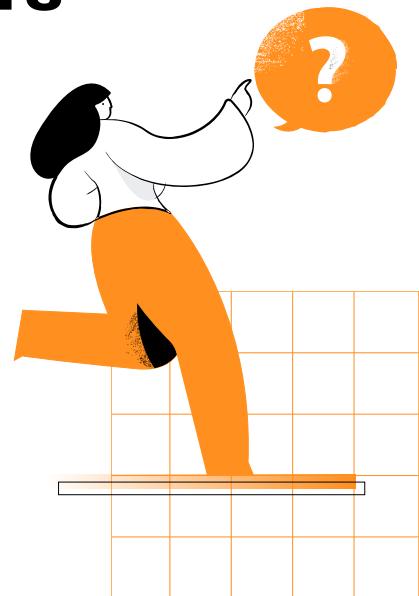
10 Questions to Ask Vendors

By now you should have a handle on what Invoca 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?

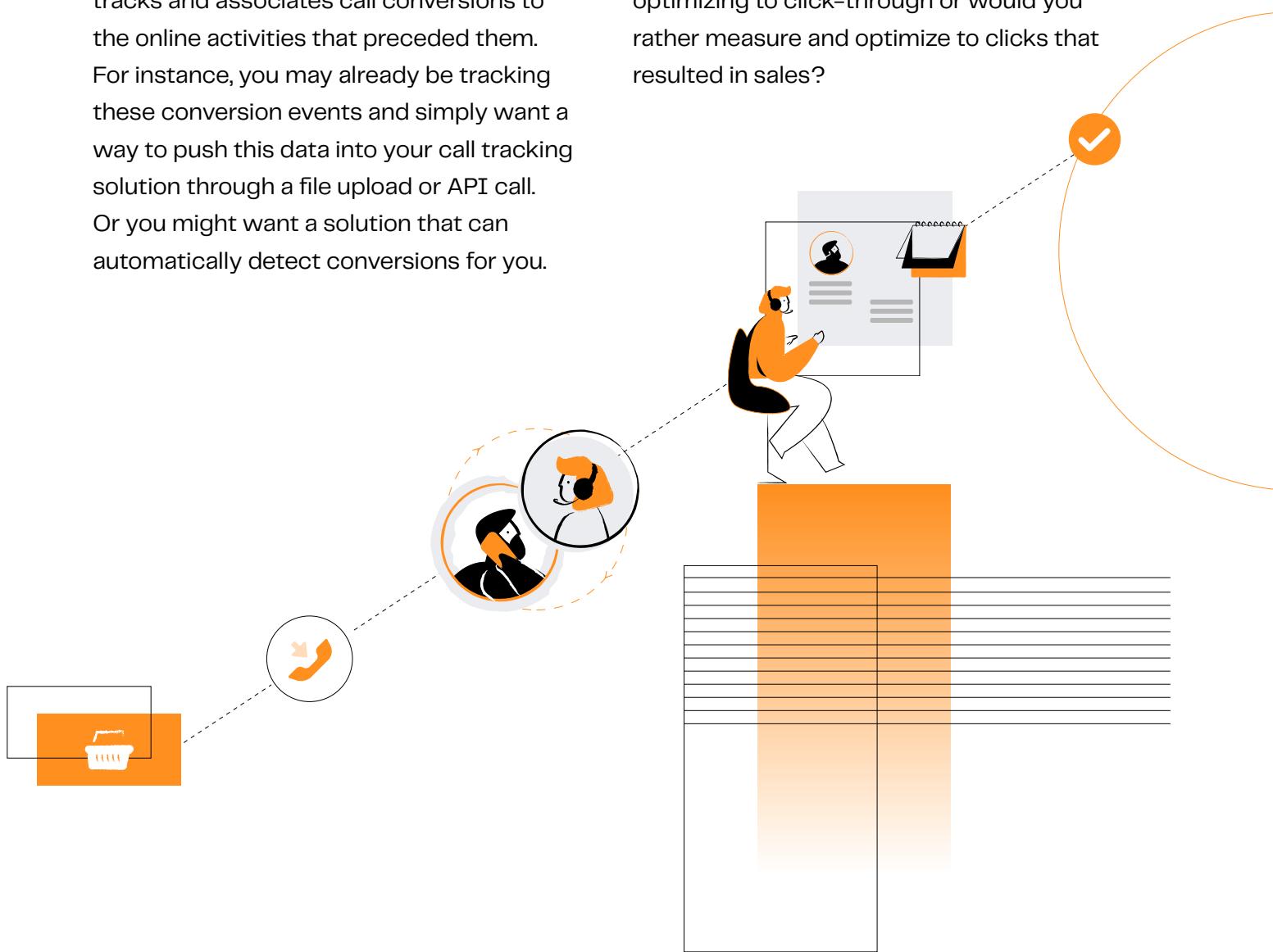
Things to look for In order to maximize the usefulness of call data, you'll need to capture any data from the website (e.g. URL query string parameters, first party cookie values, HTML elements) and attribute this data to the individual visitor, all the way to the phone call. Find out if the call tracking 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?

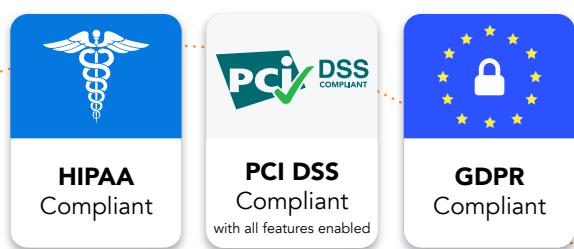
Things to look for Media optimization is the primary use case that most marketers are looking for when evaluating call tracking vendors. However, some systems can be used for additional use cases like orchestrating the post-call customer journey, personalizing the caller experience to boost conversion, or improving the digital experience by using conversation data. 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 phone conversations.



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

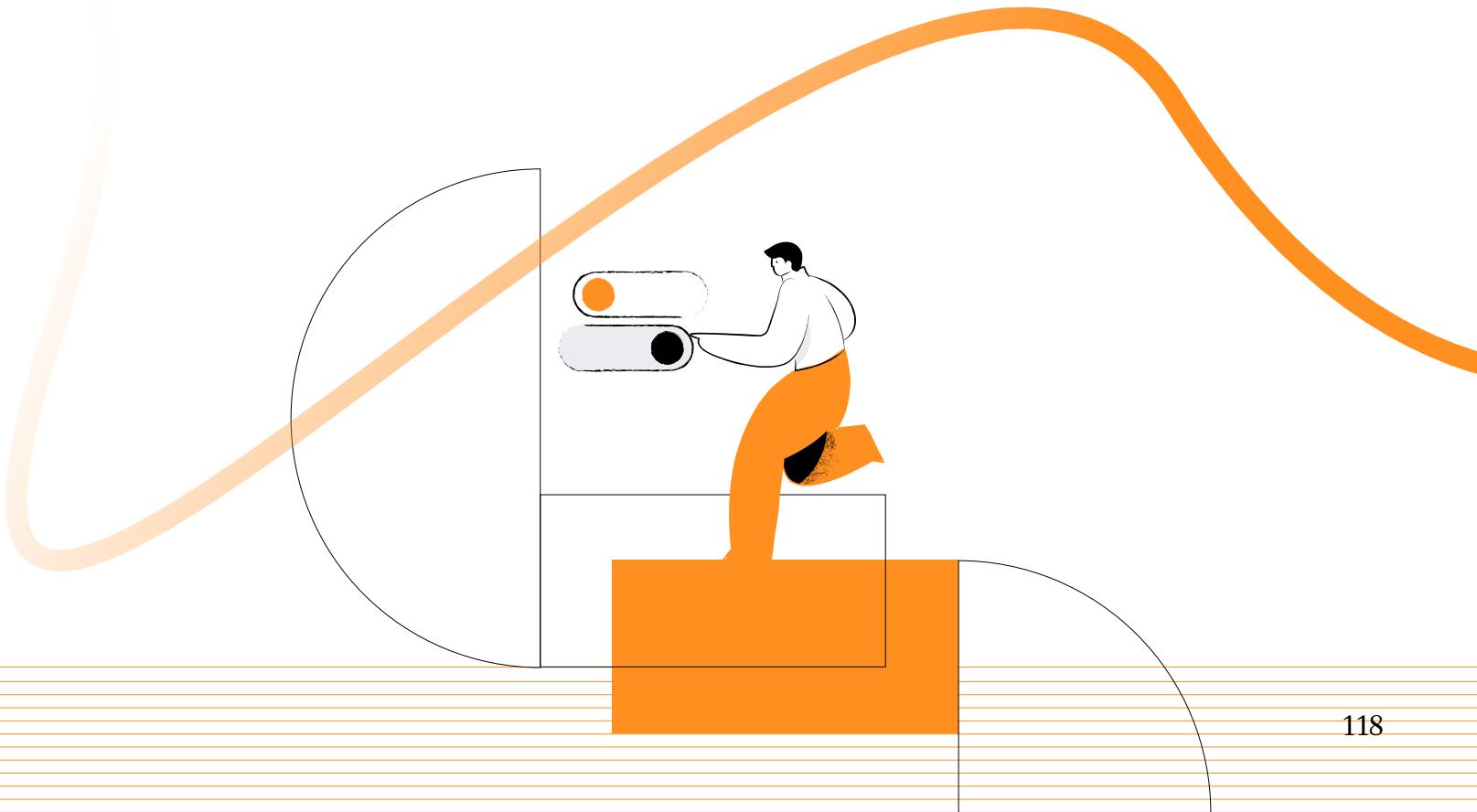
Things to look for Find out about platform uptime and how it's measured. Are there redundancies in place to ensure your business is never interrupted? What's the historic uptime for both the web application and call infrastructure?

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?



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.



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](#)



Total Economic Impact™ (TEI) study

This report was conducted by Forrester Consulting on behalf of Invoca. The study examines the millions in additional revenue that marketers can drive by using Invoca [call tracking](#) and conversational analytics to connect their online marketing and offline sales.

A composite organization based on interviews with Invoca customers found that the company's platform delivers a 395% return on investment over three years and a payback of fewer than three months.

[Download Report](#)



G2 Crowd Enterprise Grid for Call Tracking

Invoca is the top-scoring Leader in the G2 Enterprise Grid® Report for Inbound Call Tracking Software. Invoca has been the leader in the G2 Enterprise Report for Inbound Call Tracking Software for nearly two years running as of Summer 2020. In addition to being named the Overall Leader in enterprise call tracking, Invoca

also topped the Enterprise Relationship Index – which is determined by ease of doing business with a company, quality of support, and the likelihood that users will recommend to others – and is the Momentum Leader in the report, determined by a combination of social, web, employee, and review data that G2 has deemed influential in a company's momentum.

G2 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](#)



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.



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.



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.



Morgan Stanley

upfront

Accel



Invoca Customer Testimonials

Healthcare



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.”



ACADIA HEALTHCARE

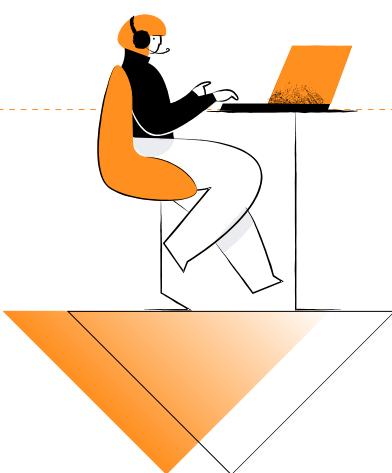
Increased inbound call volume by 25% and increased admissions by 7%, resulting in millions in additional revenue.

“We are getting more accurate and granular attribution all the way from web analytic data to call tracking data to Salesforce, and being able to connect all those dots and attribute each call to the revenue it generated creates enormous value.”

Telecommunications

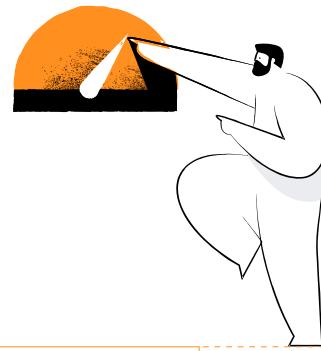


“With Invoca we’ve transformed an online conversion experience with a throughput of less than 5% into a phone call that closes in the high 60% range.”



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



Increased leads 172% and decreased CPA by 150% for its client by using Invoca.

“Choosing the right technology matters. Invoca’s data-driven platform makes all the difference in maximizing ROI for our clients.”



“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



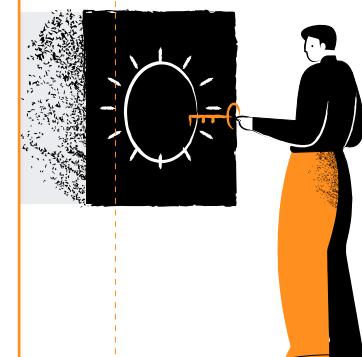
172% Increase in leads

“Choosing the right technology matters. Invoca’s data-driven platform makes all the difference in maximizing ROI.”

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.”



Test Your Knowledge – Section 6.0

1. All call tracking platforms capture attribution data at the keyword level..

True False

2. IT cares the most about:

- A. Attribution granularity
- B. Security
- C. Compliance
- D. Uptime
- E. B, C, and D

3. Marketing cares most about:

- A. Attribution granularity
- B. Platform uptime
- C. Call center costs

4. Proxy-based conversion metrics like call duration are highly accurate.

True False

5. It is better if your call tracking platform reports call outcomes to other platforms as a score than yes/no data output.

True False

Test Your Knowledge – Section 6.0 Answers

1. All call tracking platforms capture attribution data at the keyword level..

False

2. IT cares the most about:

E. B, C, and D

3. Marketing cares most about:

A. Attribution granularity

4. Proxy-based conversion metrics like call duration are highly accurate.

False

5. It is better if your call tracking platform reports call outcomes to other platforms as a score than yes/no data output.

False



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