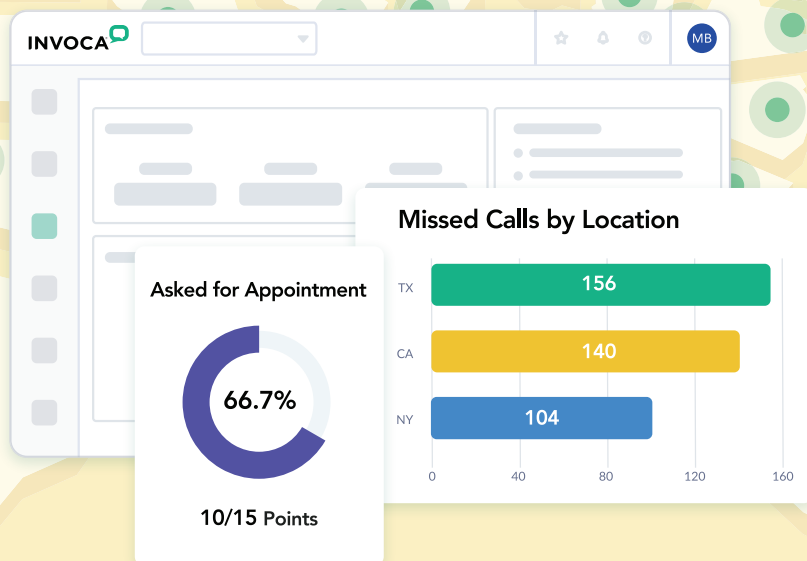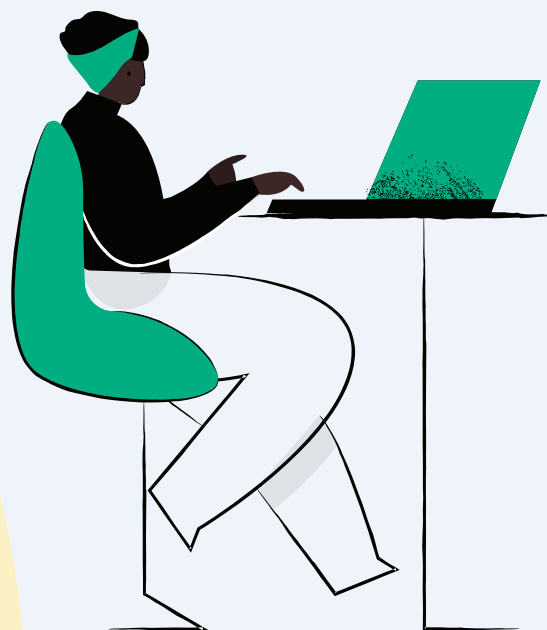# INVOCA

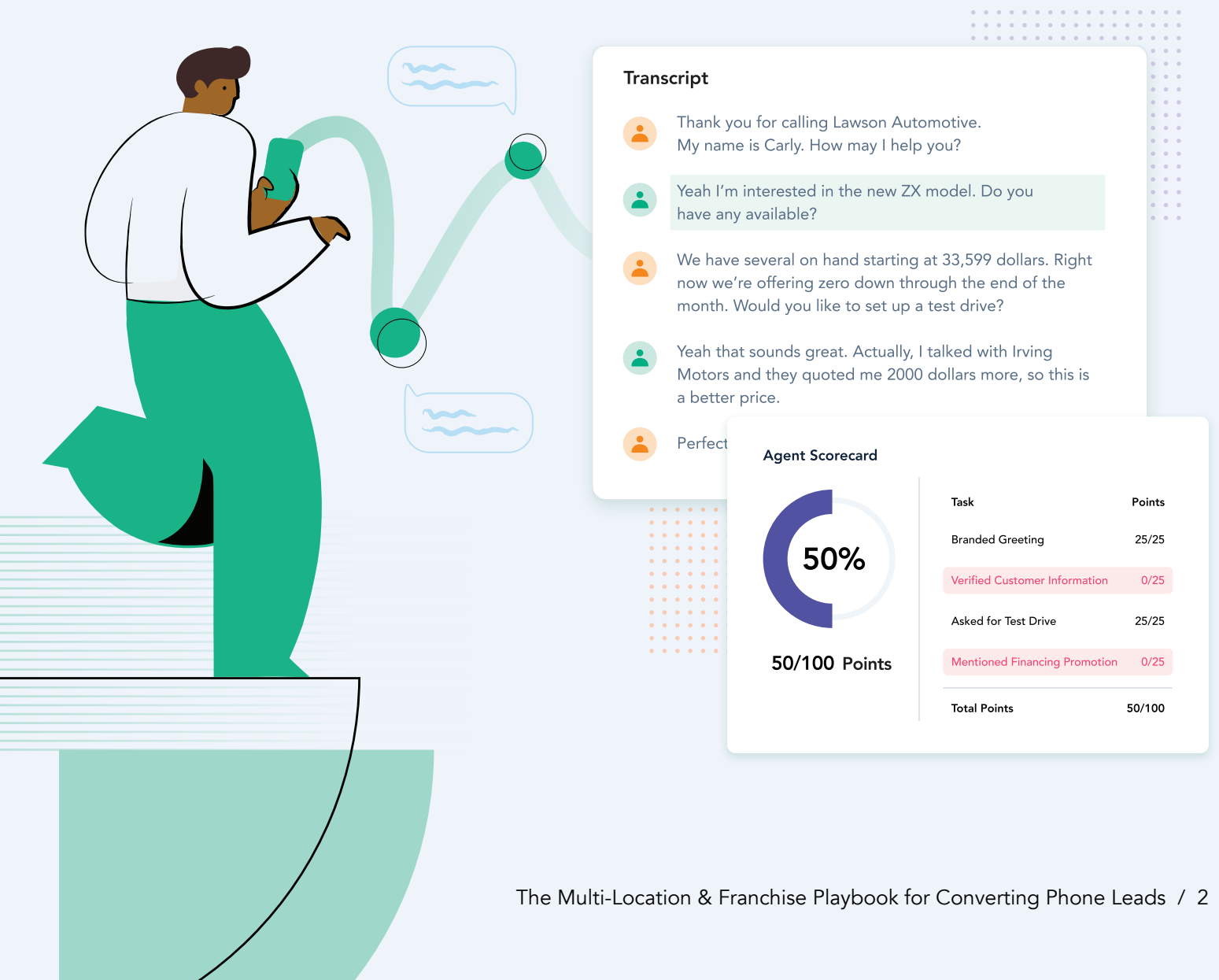# The Multi-Location & Franchise Playbook for Converting Phone Leads

How CX, Sales, and Operations Leaders
Can Help Their Locations Convert More
Callers to Customers, Patients & Revenue

Introduction

Phone calls are the main way consumers contact local businesses in automotive, healthcare, financial services, insurance, home services, legal, real estate, and other industries. And every time a location mishandles a call, the business could lose that customer or patient forever.

If your revenue hinges on the experience locations and franchisees provide callers, don't leave it to chance. This playbook explains the strategies CX, sales, and operations leaders are using to take control of the call experience at every location they manage.

Transcript

Thank you for calling Lawson Automotive. My name is Carly. How may I help you?

Yeah I'm interested in the new ZX model. Do you have any available?

We have several on hand starting at 33,599 dollars. Right now we're offering zero down through the end of the month. Would you like to set up a test drive?

Yeah that sounds great. Actually, I talked with Irving Motors and they quoted me 2000 dollars more, so this is a better price.

Perfect

Agent Scorecard

50%

50/100 Points

Task	Points
Branded Greeting	25/25
Verified Customer Information	0/25
Asked for Test Drive	25/25
Mentioned Financing Promotion	0/25
Total Points	50/100

Phone Calls Are Critical Conversion Paths for Multi-Location Brands

When consumers search for a local business or healthcare provider, they often contact them by calling. This is especially true for industries with complex, expensive, urgent, or infrequently ordered products and services. For those industries, consumers want to call to get help from a person before booking appointments, placing orders, or visiting a location.

Revenue Growth for Many Industries Hinges on Phone Calls

70%
of appointments for **appliance repair** are from inbound calls
(Invoca)

61%
of **auto shoppers** call dealers before buying a vehicle
(Invoca)

69%
of consumers schedule **auto service** appointments by calling
(Cox Automotive)

21%
of consumers call a **bank** after researching online
(Google)

88%
of **healthcare** appointments come in over the phone
(Sequence)

72%
of **insurance** shoppers buy offline by talking to a call center or local agent
(J.D. Power)

66%
of people contact prospective **lawyers** by phone
(FindLaw)

45%
of consumers call when researching or buying **mortgages**
(Bain & Company)

76%
of **pest control** shoppers say they called after searching online
(LSA)

80%
of appointments for **plumbing** are from inbound calls
(Invoca)

60%
of **real estate** shoppers say they called after searching online
(LSA)

84%
of **roof repair** shoppers say they called after searching online
(LSA)

70%
of sales leads to **senior care** providers come in over the phone
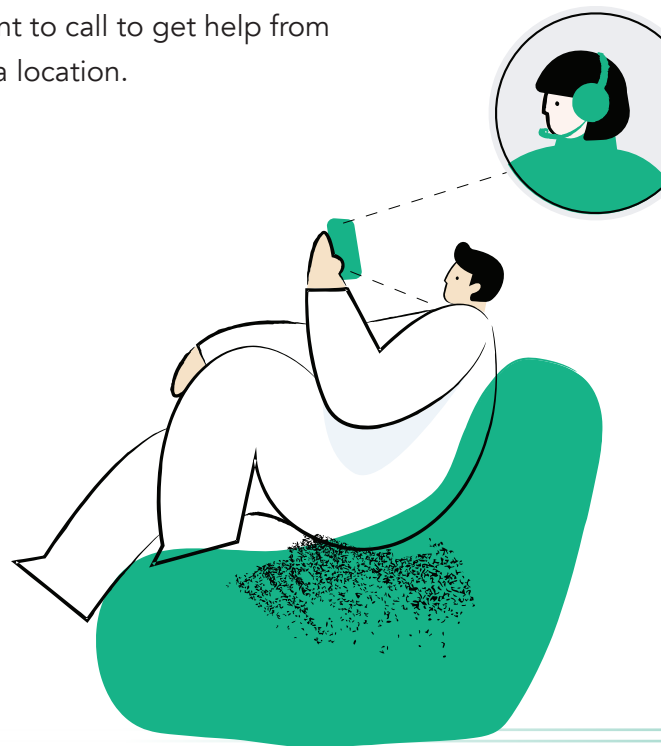(Invoca)

60%
of tours at **senior living** communities are from inbound calls
(NextWave Care)

75%
of leads for **test prep & tutoring** appointments are inbound calls
(Invoca)

Local Searches and Phone Calls Are on the Rise

According to Google, searches for local businesses continue to rise. And the more local searches consumers make, the more phone calls businesses get. Calls are also one of best drivers of loyal customers, but only for brands that deliver the right experiences to convert them.
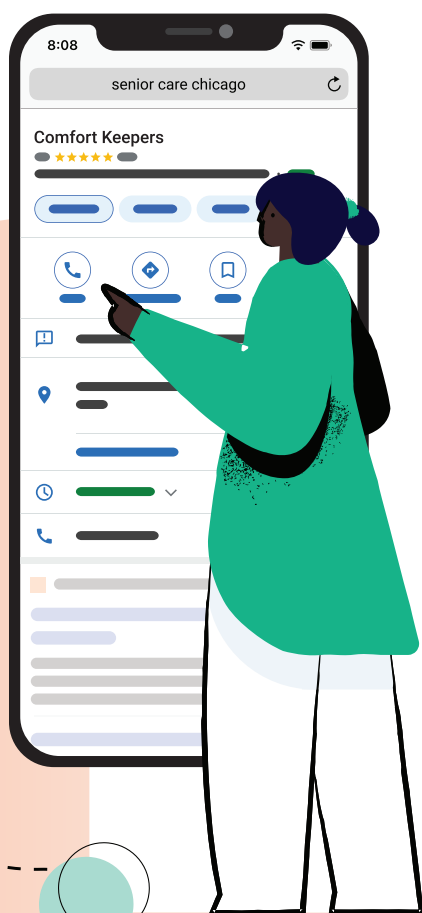
Local Searches Drive Billions of Monthly Calls

Every month in 2020, Google searches for local businesses drove
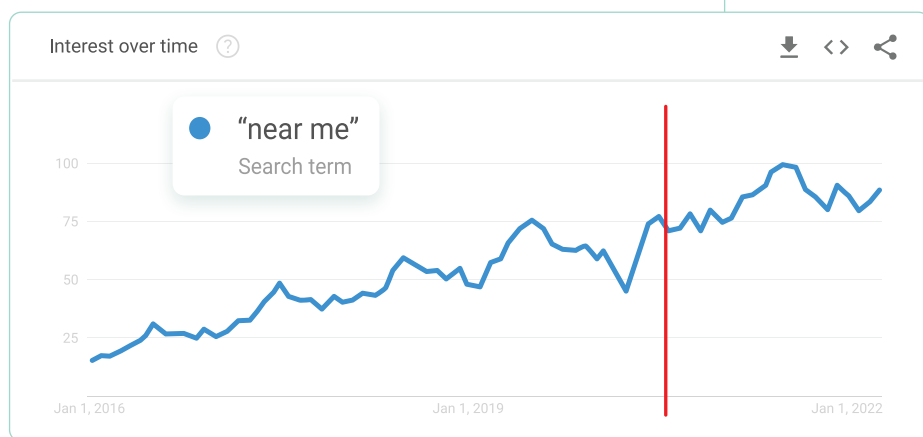
over 2 billion

phone calls, website visits, and direction requests

(Google)

And local searches have continued to rise

after 2020

(Google)

Interest over time (?)

● "near me"
Search term

100

75

50

25

Jan 1, 2016   Jan 1, 2019   Jan 1, 2022

Calls Drive Revenue & Loyalty

Phone calls to businesses convert to customers

3x more

than web clicks

(Google)

Consumers that call a business are

4x more

likely to work exclusively with them

(Zillow)

Are Your Locations Delivering the Right Experiences to Convert Callers?

Revenue growth for many multi-location and franchise businesses hinges on the experience their locations provide callers. Each time a location fails to answer a caller or delivers the wrong experience, the business could lose that customer or patient forever. Ensuring every location consistently delivers the right experience to convert callers is a major challenge for CX, sales, and operations leaders.

Issues Consumers Face When Calling Businesses

- ❌ No Phone Number to Call
- ❌ No One Answers
- ❌ Call Goes to Voicemail
- ❌ Being Put on Hold or Transfered
- ❌ Unhelpful or Rude Staff
- ❌ Call Is Never Returned

How Well Are Your Locations Answering Calls?

26%
of all calls to businesses go unanswered
(Invoca)

85%
of consumers whose calls aren't answered by a business won't call back
(Aircall)

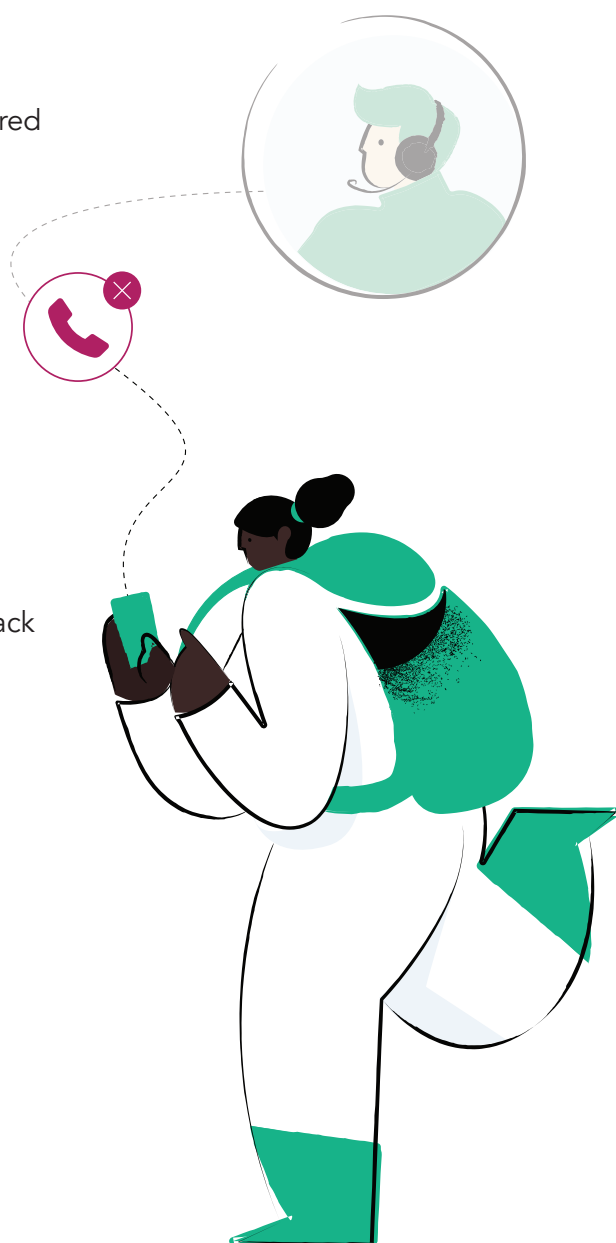## Do They Deliver Experiences That Convert Callers?

Over 50%
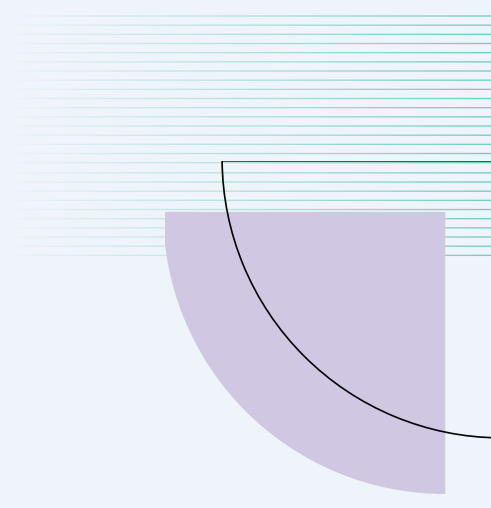of phone leads don't convert on the call
(Invoca)

84%
stop doing business with a company after a bad call experience
(OnDemand Group)

Strategies to Help Your Locations Convert More Callers to Revenue

If your job performance — and your company's revenue — depends on the experience your locations or franchisees provide callers, don't leave it to chance. Here are strategies to consider to help them convert more phone calls to appointments, visits, customers, and revenue.

1 – Properly Staff the Phones

2 – Automate Call Qualification and Management With IVRs

3 – Reduce Unanswered Calls with Ring Group Routing

4 – Establish a Talk Track for Locations to Follow

5 – Train Locations Beyond the Talk Track

6 – Measure Everything

7 – Coach Locations to Increase Conversions

8 – Follow Up With Missed and Unconverted Phone Leads

Properly Staff the Phones

Every missed or abandoned call could be a lost customer or patient. So the first step in improving call conversion rates is improving call answer and assistance rates. That means ensuring locations are properly staffed to not only answer calls but assist callers without putting them on hold and risking hangups.

Consider the following tips to help:

✅ Use Call Data to Guide Staffing Decisions

The most effective decisions are based on data, and staffing is no different. Data on which locations struggle to answer calls and the days and times when those issues occur can help you determine where and when to adjust staffing. You can also rotate staff lunch and other breaks to ensure coverage.

Location Call Handling Performance

Location	Call Count	Converted on Call	Unanswered Calls	Revenue from Calls
Indian Peaks	1,687	77%	34%	$671,989
Centura Mall	1,555	77%	14%	$508,906
Mountain Springs	1,534	83%	15%	$783,059
New Hope	1,508	78%	64%	$430,459

✅ Make Answering Calls a Priority for Locations

Location staff often have many responsibilities beyond the phones. Managers should continually stress to staff the importance of answering and assisting callers — or when possible have staff dedicated to answering calls. Letting locations know their answer rates are reviewed by executives can also help drive better results.

Unanswered Calls by Hour

— Average Unanswered Call Count
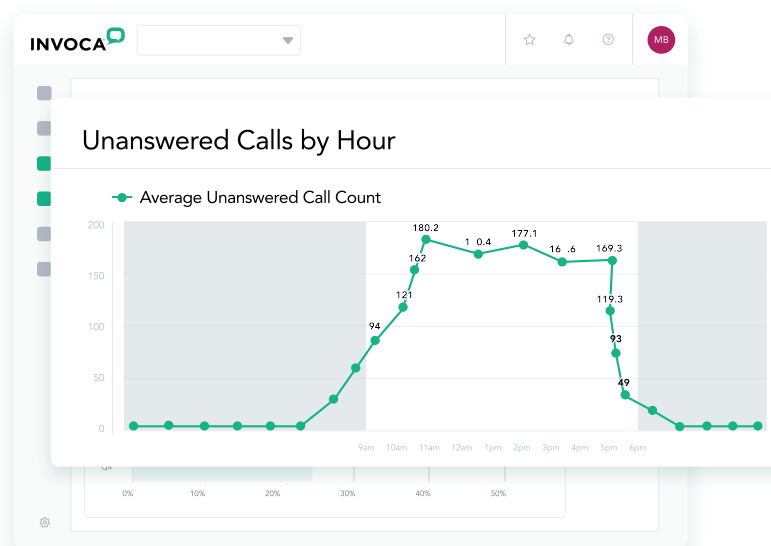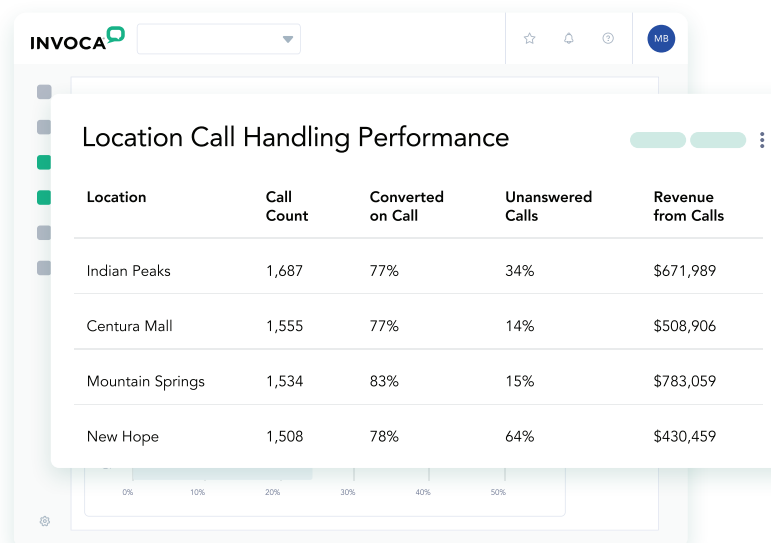
Automate Call Qualification and Management With IVRs

A big part of converting callers is connecting them right away with the best available location or agent to assist them. Who that is, however, can vary depending on each caller's intent, their location, and the structure of the business being called. It's why many multi-location and franchise businesses use IVRs (automated phone menus) to automatically qualify, route, and assist callers.

Ways to Use IVRs to Improve Caller Experiences

Route by Intent

Have IVRs ask why they are calling (e.g., booking an appointment vs. rescheduling one) and route callers to the best location or agents to help — consider dedicating staff just for converting new leads.

Route by Interest

Have IVRs ask callers what product, service, or department they are calling for (e.g., sales vs. service, pediatrics vs. oncology) and route them accordingly.

Route by ZIP Code

Have IVRs ask callers to provide the ZIP code they are calling from and route them to the closest open location to assist.

Screen for Ineligible Calls

Have IVRs ask questions to filter out callers your business can't serve so your staff doesn't waste time assisting them.
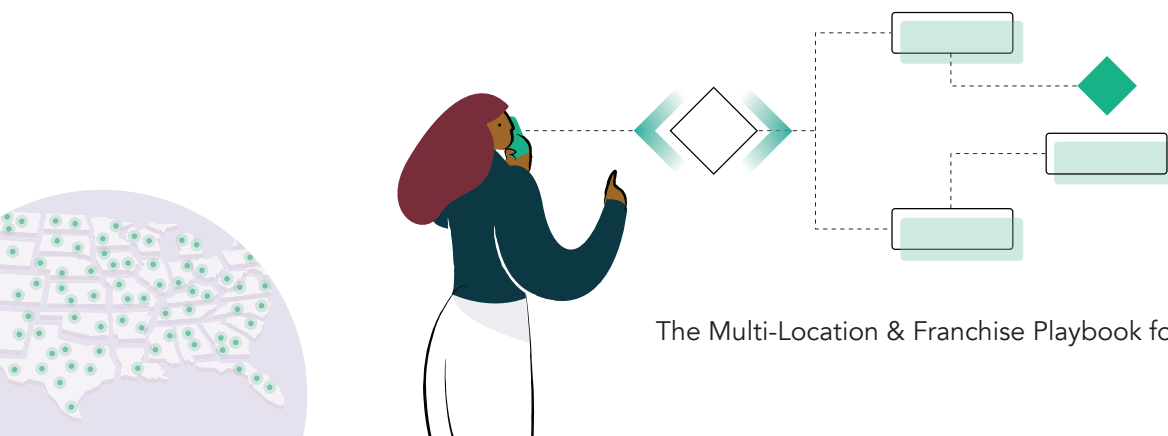
Automate Call Handling

Have IVRs assist callers when locations are closed or busy. IVRs can answer common questions or ask callers to request a call back.

Help Callers Convert Online

Instead of forcing callers to wait on hold, give the option for the IVR to text a link to complete their appointment or order online.
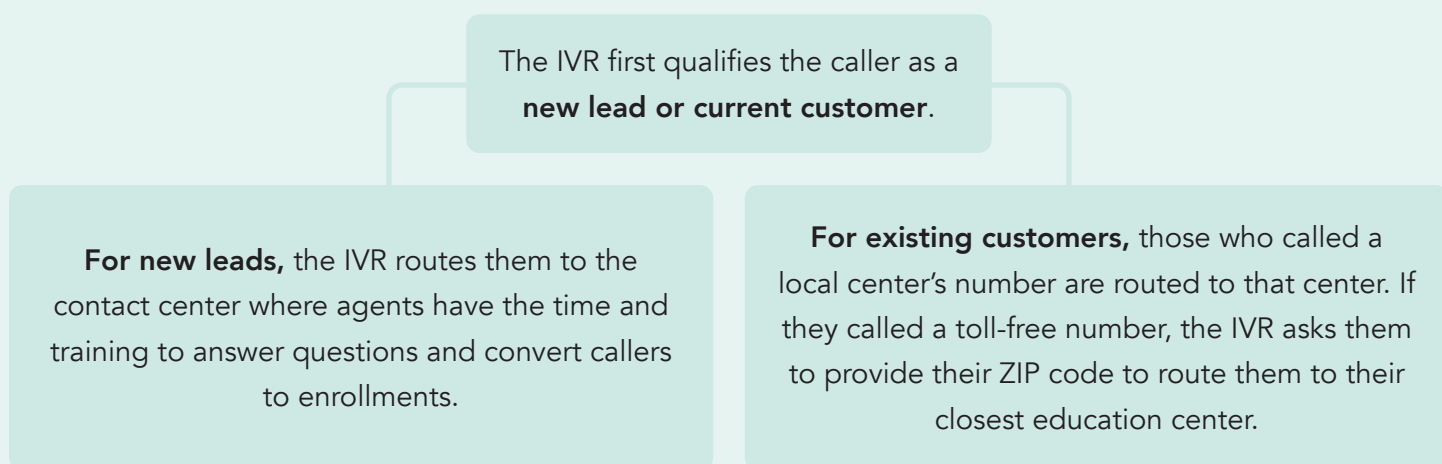
C2 Education

C2 Education is a leading provider of test prep, tutoring, and college counseling services, with over 180 education centers across the US. They use Invoca IVRs to qualify and route each caller to the best destination to assist them.

When a consumer calls C2 Education:

The IVR first qualifies the caller as a **new lead or current customer**.

For new leads, the IVR routes them to the contact center where agents have the time and training to answer questions and convert callers to enrollments.

For existing customers, those who called a local center's number are routed to that center. If they called a toll-free number, the IVR asks them to provide their ZIP code to route them to their closest education center.
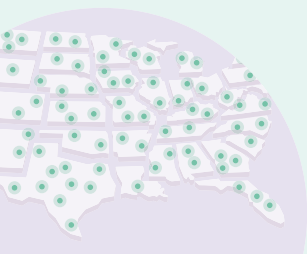
Using Invoca IVRs, C2 Education has increased enrollments from prospects and decreased contact center call volumes and costs while providing better service to callers.

C2 education

"We've increased our contact center channel enrollments by 150% while lowering our cost per lead by 40%. It's been a game-changer."
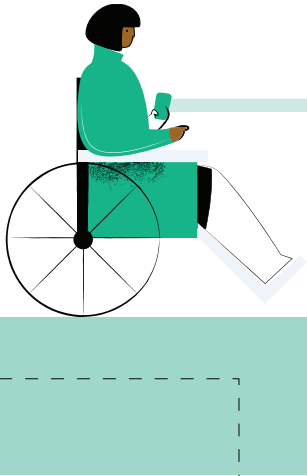
Read more of their story ▸

Reduce Unanswered Calls with Ring Group Routing

You never want phone calls to busy or closed locations to go unanswered when you have other options available to assist them. With ring group call routing, instead of sending calls to a single phone number that might not answer, the call is forwarded to a list of numbers sequentially or simultaneously until someone does.

Routing Options to Reduce Missed Calls

Call next number if no answer after [10] seconds

Attempt to connect calls

In order

☐ Call Acceptance

	Label (Optional)	Number
1.	Sales Agent #1	312-444-5544
2.	Sales Agent #2	312-444-5533
3.	Sales Agent #3	312-444-5522
4.	Receptionist Desk	312-444-0000

Sample Invoca ring group routing campaign

Forward Unanswered Calls to Call Centers

Route calls to a location first, but if they don't answer, forward callers to your call center to assist.

Ring Every Agent's Phone at Once

Have calls ring every sales agent simultaneously – the first person who answers gets the call.

Send More Calls to Your Best Sales Agents

Have more calls forwarded to your top agents to increase your overall conversion rates.
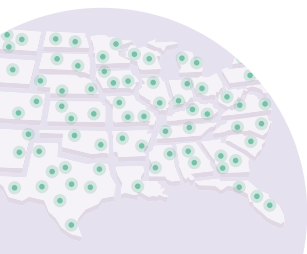
University Hospitals

University Hospitals is a leading US healthcare provider with more than 200 locations, 18 hospitals, and 55 health centers. They receive more than 400,000 calls a month and use Invoca to help provide them with the best experience.

For example, Invoca uses real-time data from the University Hospital CRM to know callers have already seen a specific provider. Rather than having those callers go to a call center handling thousands of calls, Invoca routes them directly to their provider, helping to cut call center call duration by 50% and increase conversions by 300%.

University Hospitals also uses Invoca to detect and correct caller experience issues costing them patients. In one example:

- ✅ Invoca data showed University Hospitals that 29% of phone calls were being routed to a physician messaging service where only 10% were resulting in appointments.

- ✅ University Hospitals made changes internally to reduce the drop-off, including training the service on the right talk track.

Now 68% of those callers are scheduling appointments, leading to an incredible 580% increase in conversion rates.

University Hospitals

"We have a responsibility to make sure that when patients call, they get the information and care they need, right when they need it. That responsibility includes using better technology to create a better patient experience, which is why we implemented Invoca."

Read more of their story ▸
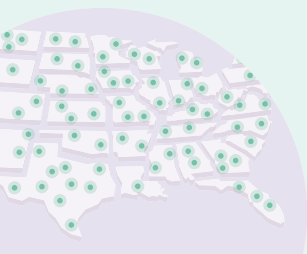
Establish a Talk Track for Locations to Follow

Connecting callers with the right person is the first step. Ensuring that person says the right things to convert them is the next. An effective talk track — also known as a script or playbook — can help. Your talk track will depend on your business, what makes up a qualified lead, what a conversion is to you, and more. Here are examples of talk track elements other businesses use.

Greet Callers Properly

Ensure you start every call on the right foot. Staff can thank them for calling, provide your business name and their name, and ask how they can help.

Ask for Information

Staff can capture contact details such as the caller's name, email and mailing address, and the best phone number to contact them.

Qualify Callers

Depending on your industry, you may want staff to qualify callers by asking about their insurance, if they own their home, if they are the decision maker, and more.

Handle Objections

If the caller hesitates and wants to think about it, you may have time-sensitive promos or other points staff can offer to get the conversion.

Mention Differentiators

If a caller mentions a competitor, staff can mention your top differentiators for why you are the best choice.

Discuss Price

For some businesses, this is just making sure staff provides callers with a price. For others, it might be explaining your value to justify it.

Offer Alternatives

If someone calls for a product, service, or appointment time you don't have, staff can offer alternative options to convert them.

Suggest Upsells

Staff can ask callers If they would be interested in a higher-tiered edition of your offerings or purchasing add-ons.

Ask Them to Convert

Maybe the most important part of converting callers is having staff ask them to convert (such as book an appointment, visit your store, or place an order).

Set a Firm Date

If a caller agrees to an appointment or to visit your business, staff should get them to agree to a specific day and time.

Set Expectations

Let callers know what to expect prior to and during their appointment or visit. For example, tell them if they will get a text reminder or where to park when they arrive.

End the Call Correctly

Staff can thank consumers for their call, show appreciation for their business, and recap the call outcome ("we will see you on Tuesday at 9am").
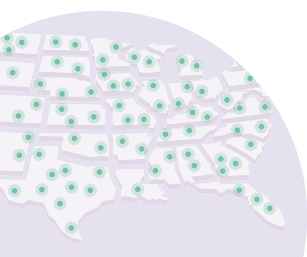
Train Locations Beyond the Talk Track

Having an effective talk track gives your locations the tools to convert callers. But winning customers and patients is not just about what you say. It's also about how you say it – and even what you don't say. Here are some additional best practices for your locations to consider to increase conversions.

What to Do

- ✅ **Be Polite and Appreciative:** Staff should express a willingness and commitment to help, use "pleases," "your welcomes," and "thank yous," and convey an appreciation for the caller's business.

- ✅ **Be Human:** Staff should never speak in an annoyed or rushed voice no matter how busy they are. They also shouldn't read or parrot talk tracks. Always be attentive and speak naturally with an empathetic tone.

- ✅ **Be Compliant:** Some businesses are legally required to provide callers specific information, often verbatim. If you are one, then it's critical that your locations always do so.

- ✅ **Be Forthright:** Tell callers the full truth upfront, even if it is unpleasant, to avoid dealing with irate customers and bad reviews later. For example, if your business charges $150 for inspections, tell that to the caller before they finalize an appointment.

What Not to Do

- ❌ **Put Callers on Hold:** Every time you put a caller on hold you risk losing them. While it may not be realistic to eliminate all holds, if you are staffing locations properly and connecting callers with the right agent trained to help, you can minimize holds. If staff must put a caller on hold, explain why and ask for permission first.

- ❌ **Dead Air:** When staff helping callers go silent for too long, they seem unprofessional and unprepared. Understanding why it occurs and providing proper training should reduce it.

- ❌ **Fillers and Verbal Crutches:** It may seem petty but too many "umms," "ahhhs," "likes," "kindas," and "you knows" from your staff can hurt confidence in your expertise and professionalism.

- ❌ **Overtalking:** Callers want help, but if staff hog the conversation or talk over them, then the caller doesn't feel understood. Even if staff can anticipate what a caller wants, let them say it.
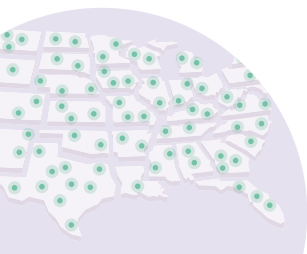
Measure Everything

You can't improve what you don't measure. To increase phone call conversion rates at your locations, you need accurate and nuanced data to benchmark performance, identify issues to correct, and measure improvements over time.

A conversation intelligence solution like Invoca can help. It can report on the data and scoring you need for 100% of calls, filter reports by region, state, city, or individual location, and share relevant reports and recordings with specific stakeholders. Here are examples of the data Invoca provides to CX, sales, and operations leaders and the locations they manage.

Data Examples

- ✅ Total Calls
- ✅ Missed Calls (%)
- ✅ Voicemail Calls (%)
- ✅ Lead Calls (%)
- ✅ Converted Calls (%)
- ✅ Product/Service Interest
- ✅ Revenue From Call
- ✅ Talk Track Scoring
- ✅ Compliance Tracking
- ✅ Call Duration
- ✅ Manager Escalation
- ✅ Competitor Mentioned
- ✅ Location/Agent Called
- ✅ Caller's Phone Number

National, Regional & Location Reports

Location Call Handling Performance

Location	Call Count	Converted on Call	Unanswered Calls	Revenue from Calls
Indian Peaks	1,687	25%	34%	$671,989
Centura Mall	1,555	33%	14%	$508,906
Mountain Springs	1,534	42%	15%	$783,059

Location Call Scoring

Store Name	Ask for Appointment (Percent)	Proper Greeting (Percent)	Proper Close (Percent)
Denver	100%	70%	45%
Buena Park	67%	6%	46%
Cincinnati	60%	81%	65%
Reno	56%	59%	48%

Sample Invoca reports

Call Recordings & Transcripts

Sample call recording, transcript, and associated data in Invoca

Spectrum Retirement

Spectrum Retirement is a leading operator of 48 retirement, assisted living, and memory care communities.

They use Invoca's AI to QA 100% of sales-related calls to identify if their communities are qualifying callers correctly (asking about decision-makers, budget, and desired features in a community) and asking qualified callers to schedule a tour. Invoca also flags calls where agents use the wrong nomenclature or misrepresent the brand.

Spectrum sales managers can then review relevant call recordings and transcripts in Invoca and add coaching comments to highlight areas for agents to correct or to reinforce good habits.

By coaching their sales team with Invoca, Spectrum Retirement has added several percentage points to its occupancy, exceeding pre-pandemic levels.

SPECTRUM RETIREMENT COMMUNITIES

"With Invoca, we let the machine learning do the work and score 100% of calls to our communities, identifying each agent's strengths and areas for improvement. Having this data in one platform for every location in real-time is a huge time-saver, and being able to tag calls in Invoca with comments has changed the game for how we coach agents."

**Read more of their story ▸**
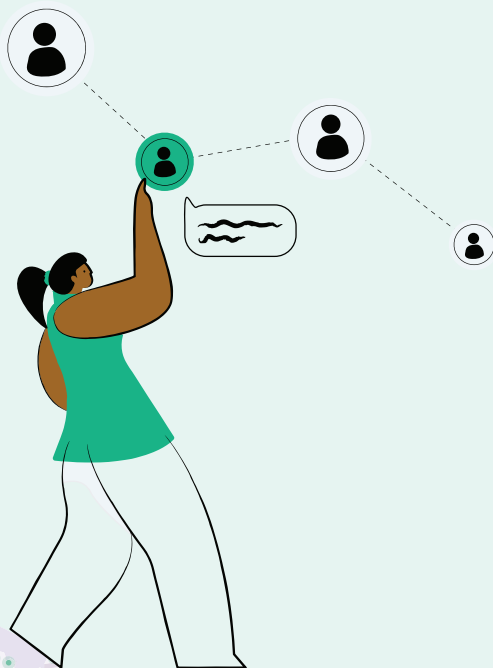
Coach Locations to Increase Conversions

As a general rule, your locations should convert at least half of their qualified phone leads to appointments, opportunities, orders, or visits. For locations that are underperforming, you should coach them on how to improve.

Having accurate scoring data on all calls can help. Instead of basing coaching feedback on a small subset of random recordings, you can base it on granular talk track scores for 100% of calls. Location staff will trust scoring that is comprehensive, data-driven, transparent, and fair. And providing targeted feedback for specific moments in calls is a more effective way to correct the bad while celebrating and reinforcing the good.

Targeted Data-Driven Coaching Drives Faster Improvements

Agent Scorecard
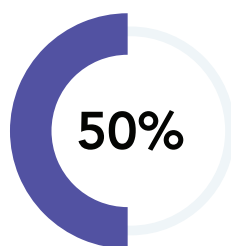
50%

50/100 Points

Task	Points
Branded Greeting	25/25
Verified Customer Information	0/25
Asked for Test Drive	25/25
Mentioned Financing Promotion	0/25
Total Points	50/100

Sample of talk track scoring and coaching comments in Invoca

Comments

2:34
Right now, we're offering one percent APR on all new vehicles purchased before the end of the month.

Reply or tag a user with @

Nicole Song 30 minutes ago
@Carlos Ramirez - Here is another example of a request to match a 0% down offer

Carlos Ramirez 45 minutes ago
@Nicole Song - We need more training on how to respond to these offer matching requests -- this wasn't handled right

Follow Up With Missed and Unconverted Phone Leads

Locations will never answer and convert 100% of their phone leads. So for unanswered calls and unconverted leads, call them back as soon as possible. If the caller left a voicemail, call them back immediately and apologize for missing their call.

If you have talk track scoring data, use it to help convert these callbacks. For example, perhaps your staff failed to secure a firm time for the caller to visit, or they failed to mention your latest promotion — make sure they do it when they call back. If a caller said they would call back but didn't, pursue that lead. Prospects may forget to call your locations back, but your staff shouldn't.

Plus, if the location spoke to the caller and captured their email address, you can try to engage with them by email. Having both their phone number and email address can also enable you to target that caller with digital ads on Google, Facebook, and other platforms to get them to re-engage.
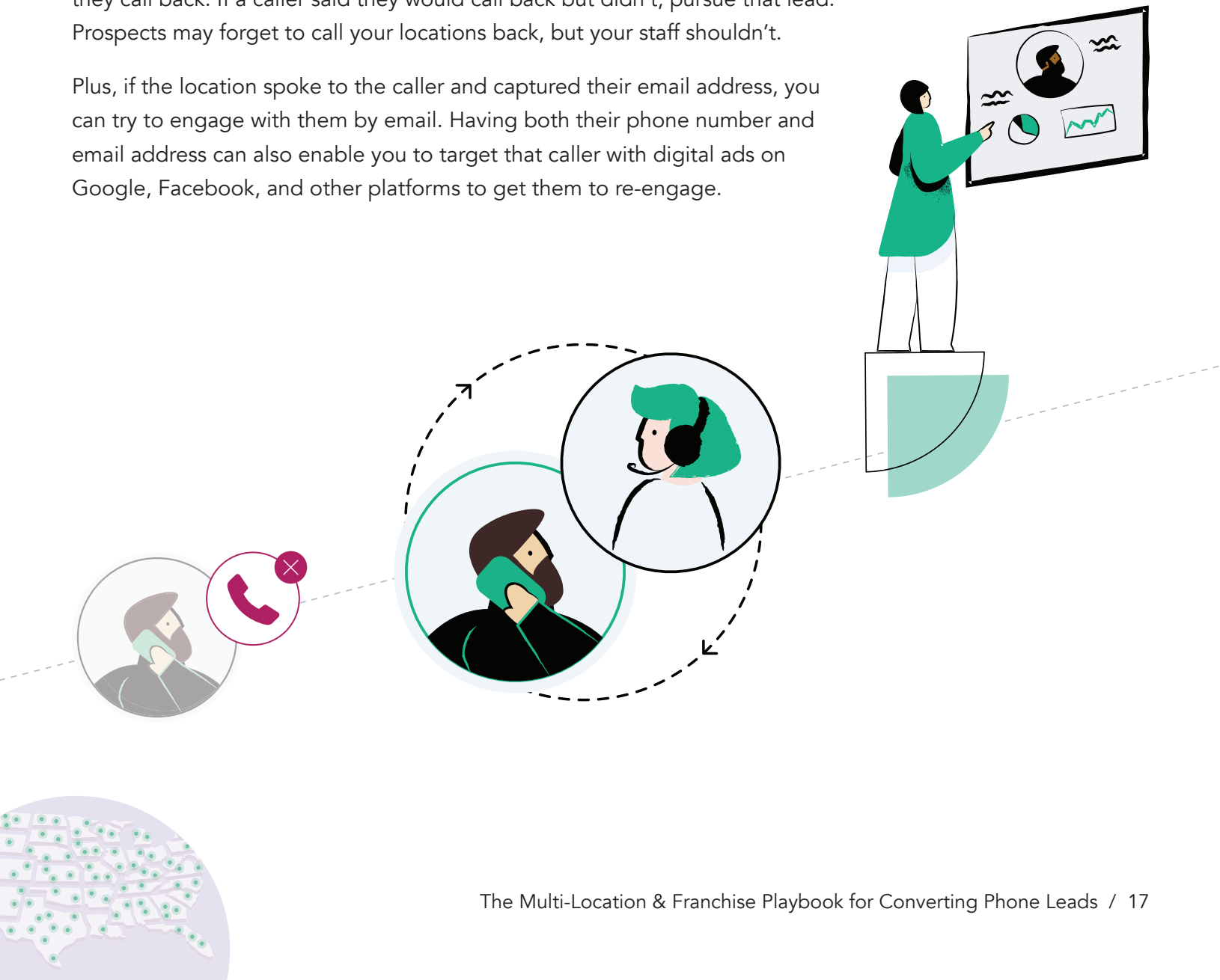
AutoNation

With over 300 locations, AutoNation is America's largest auto retailer. AutoNation uses Invoca to train its staff to convert more callers to store visits, test drives, and service appointments:

- ✅ Invoca records and transcribes every inbound call and uses AI to analyze 100% of conversations to score agent performance for the KPIs that matter to AutoNation — including if the agent is greeting a caller correctly, if they're asking to set an appointment, and more.

- ✅ AutoNation managers use Invoca to identify sales agents' weaknesses and coach them to improve their performance.

- ✅ Staff even review their own call scores and recordings to train themselves without waiting for the next manager meeting.

AutoNation also uses Invoca reports to see which dealerships are having issues answering calls and when those issues occur. By properly staffing dealerships to handle call volumes, they have reduced missed calls and increased conversions.

AutoNation

"Invoca's call recordings and transcriptions are invaluable coaching tools. Insights from Invoca have helped guide a great deal of our training. They've also helped us close the customer feedback loop so we can understand how our customers think, what matters to them, and their sentiments."

Read more of their story ▸

Finally, AutoNation uses Invoca IVRs to route callers to the best department to assist them. IVRs even give callers the option to receive a text to schedule appointments online, reducing hold times and enabling agents to efficiently assist other callers.
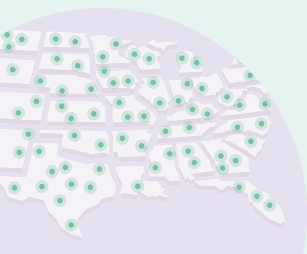
Next Steps

We hope you find the strategies outlined in this playbook helpful. For multi-location and franchise businesses, one of the most effective ways to grow revenue is to convert more callers to customers and patients. And when your locations answer more calls and deliver the right experiences, your conversions will increase.

If you are interested in learning more, you can visit **invoca.com** for best practices and success stories. You can also request a personal demo of Invoca's conversation intelligence solution to see how it can help your locations convert more callers to revenue.

About Invoca

Invoca provides CX, sales, and operations teams with a centralized platform to analyze and optimize caller experiences at all their locations. Through a unique combination of AI-powered speech analytics, automated call scoring, intelligent call routing, and conversational IVR technology, Invoca helps multi-location and franchise businesses reduce missed calls, convert more callers to customers and patients, and grow revenue fast.

Christian Brothers Automotive®

"The centralized analytics Invoca provides on missed calls and location call handling performance has been an eye-opener. Invoca enables us to detect and correct CX issues, improve call conversion rates, and drive more revenue across our entire franchise."

Powering the Leading
Multi-Location & Franchise Businesses

AutoNation AAMCO TRANSMISSIONS University Hospitals ACADIA HEALTHCARE Comfort Keepers.

AspenDental ATI PHYSICAL THERAPY Miracle·Ear® MITSUBISHI ELECTRIC ORKIN

invoca.com