The Digital Marketer's Ultimate Guide to
CALL INTELLIGENCE

INVOCA

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This eBook is for:

B2C and B2B marketers who care about:

- Multi-touch marketing analytics

- Understanding customer behaviors and preferences

- Creating cohesive online-to-offline customer experiences

- A complete picture of marketing ROI

What's in this eBook?

Introduction
Digital Meets Phone Calls

In today's mobile world, consumers are bouncing between channels and devices, and call intelligence helps you connect the dots when consumers pick up the phone. There's no doubt today's path to purchase is omni-channel. Your analytics should to be too.
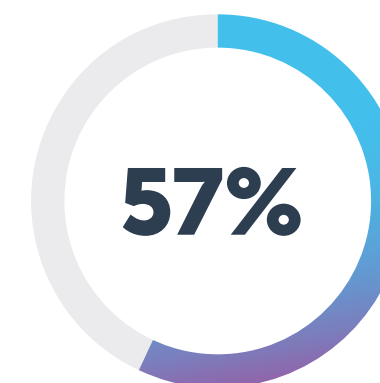
In this eBook, you'll discover common call intelligence use cases, best practices, and key features, so you know exactly how it can impact your bottom line.

Calls to businesses from smartphones will reach

162 billion by 2019.[1]

Calls to U.S. businesses driven by mobile search are expected to grow to

73 billion by 2018.[2]

57%

57% of smartphone users would call a business after searching for information on their phone because they want to talk to a real person.[3]

Part 1
What is Call Intelligence?

Call intelligence is for marketers who want to use their digital prowess to drive meaningful interactions through phone calls. At its core, call intelligence sheds light on how phone calls fit into the customer journey. It is complete multi-touch call attribution, with all the tools to manage the customer experience during the call and beyond.

How is Call Intelligence Different From Call Tracking?

Call Tracking

CALL ATTRIBUTION
- ✓ Search campaign
- ✓ Marketing source
- ✓ Referring URL

REAL-TIME REPORTING
- ✓ Call date and time
- ✓ Call duration

Call Intelligence

CALL ATTRIBUTION
- ✓ Search campaign/keyword
- ✓ Marketing source
- ✓ Referring URL
- ✓ Landing page
- ✓ Cookies
- ✓ Unique sub IDs

REAL-TIME REPORTING
- ✓ Call date and time
- ✓ Call duration
- ✓ Demographic caller profiles
- ✓ Conversation analytics
- ✓ Revenue attribution

SALES AGENT ENABLEMENT
- ✓ Screen pop
- ✓ Call recordings

CALL AUTOMATION
- ✓ IVR (Interactive Voice Response)
- ✓ Quality filters
- ✓ Routing logic
- ✓ Journey triggers

INTEGRATIONS AND APIS
- ✓ Bid management
- ✓ Marketing automation
- ✓ CRM
- ✓ Affiliate tracking solutions
- ✓ Web analytics
- ✓ Data management solutions

MULTI-LEVEL LOGINS

A Search Marketer's Perspective
Q&A with Larry Kim, Founder of WordStream

About WordStream

WordStream, a leading search marketing software and services provider based in Boston, manages approximately a half-billion in annual ad spend for thousands of customers.

When it comes to using PPC to drive phone calls, what are most advertisers doing wrong?

The three major mistakes marketers are making right now with click to call are:

- Not answering calls or leaving people on hold
- Sending calls to untrained, unknowledgeable staff
- Not using call analytics to spot optimization opportunities and fix problems

Marketers are really throwing money out the door if they aren't focused here right now. Recently, researchers found that 20% of phone calls from click-to-call ads are abandoned for the three reasons above, and that's just unacceptably high. That's a fifth of your business that you paid to acquire and booted back out the door!

How do you know which campaigns and keywords are a good fit for click-to-call or call-only campaigns?

Navigational and commercial queries are best for click-to-call campaigns. Navigational queries are based on keywords that indicate someone is trying to find their way to you or locate something close to them—they're searching business names, addresses, or looking for something nearby. Commercial queries have that intent to purchase that we all crave. Think about the types of things you'd look up in a phone book (remember those?); business services in tightly defined categories do best.

When using PPC to drive phone calls, how should you adjust your bidding and/or targeting strategy?

For bidding, I like to optimize for Call Rate (also known as Phone-Through Rate) based on the percentages of people who view the ads or click-on the call button, etc. If your goal is to drive more calls, you're going to want to bid more on the ads that generate more calls. Use a call tracking solution like Invoca to figure out which calls are the most valuable, then allocate proportionately more budget to those campaigns.

Do you have any advice for driving phone calls from the landing page?

Definitely! Use a call intelligence solution to track where calls came from. The software will rewrite the phone number dynamically. Mobile landing pages are really important here, too. You want to emphasize the phone call and your CTAs for mobile traffic.

When should advertisers think about using a more sophisticated solution beyond AdWords for call tracking?

Well, the fantastic thing about AdWords call tracking is that it's free but, at some point, you're probably going to start looking for something more powerful. Any company that relies in some way on getting business over the phone should be using call intelligence. You have to be able to tie your calls back to whatever touchpoint was responsible for the call, then truly understand who you were talking to so you can optimize your marketing campaigns for the greatest return and maximum efficacy.

Features Overview

Call Attribution

Call intelligence has flexible single- or multi-touch attribution so you only capture the data relevant to your goals.

Common attribution parameters:

CAMPAIGN/KEYWORD: Paid search campaign and/or keyword that led to a call, either directly from the ad or landing page

MARKETING SOURCE: Any marketing campaign, ad, or offer that led to a phone call

REFERRING URL: Referring URL that led to a call, along with all appended parameters

LANDING PAGE: Landing page or webpages visited before the call was placed

COOKIES: First-party cookies containing engagement history

UNIQUE SUB IDS: Any other parameter including client or customer IDs

Real-Time Reporting

Real-time reporting shows you trends in consumer behavior and provides a detailed look at your marketing performance so you know how to improve.

Key reporting metrics include:

CALL DATE AND TIME

CALL DURATION

DEMOGRAPHIC CALLER PROFILES:

- First and last name
- Age range
- Address
- Address type (business or personal)
- Carrier
- Do-not-call list

CONVERSATION ANALYTICS: Track the important moments on a call so you can easily judge the quality and outcome.

Sales Agent Enablement

Sales enablement features ensure your sales reps make the most of each and every call.

SCREEN POP: Populate your sales agents' dashboards with pertinent caller information like demographic and marketing engagement details.

CALL RECORDINGS: Use call recordings to train reps, test sales messaging, and spot areas for improvement.

Features Overview

Call Automation

Call automation lets you easily control every aspect of the caller experience.

IVR: The IVR (Interactive Voice Response) gives you the ability to create the menu system that greets and directs your callers.
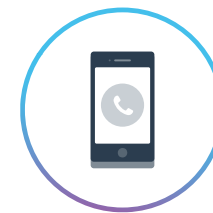
FILTERING AND ROUTING: Calls can be filtered and routed based on a variety of factors so that calls always get to the right destination.

JOURNEY TRIGGERS: Inform your other systems in real time when a customer or prospect calls.

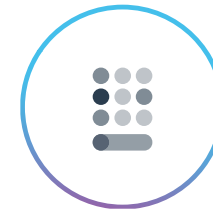**Routing conditions include:**

Time and day

New vs. repeat call

Geographic location

Responses to menu prompts

Phone type

Integrations and APIs

Call intelligence works at its peak potential when it is integrated with the rest of your technology stack. Call intelligence is typically integrated with marketing automation, CRM, bid management, marketing analytics, and data management solutions.

Multi-Level Logins

With multi-level logins, you can grant your team members and agency or affiliate partners different levels of access to the platform. This way, they can create campaigns and access the types of reports that are relevant to them.

Part 2

How to Turn Call Intelligence Into Revenue

Successfully using call intelligence comes down to the following three basic steps:

1. Gathering Valuable Insights
2. Personalizing Customer Engagement
3. Putting Data Into Action

Gathering Valuable Insights

Call intelligence addresses the blind spot in your marketing analytics. Use it to attribute revenue and conversions back to your marketing campaigns and get in-depth insights about your customers.

Pick an Attribution Model:

Multi-Touch/Visitor-Level Attribution

This is the most comprehensive model that shows how a phone call fits in the entire context of the customer journey.

For a complete view, multi-touch attribution provides all engagement activity before and after a call over any timeframe.

Session-Level Attribution

This captures touchpoints leading up to a phone call within a single visitor session. Session-level attribution data includes:

- Paid search keyword
- Campaign
- Landing page
- Subsequent browsing activity

Campaign-Level Attribution

This is the most basic type of attribution that attaches a single campaign to a phone call. Attribute phone calls to:

- Search campaigns
- Affiliate/agency partners
- Event collateral
- Offline ads

Gathering Valuable Insights

Capture Key Customer Data Points

Think about what kind of information you can act on. Call intelligence provides rich insight into your customers that can power optimizations across every aspect of your marketing, including customer messaging, conversion rate optimization, ad targeting and retargeting, follow-up strategy, and more.
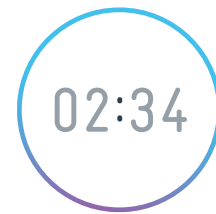
Commonly used data points include:
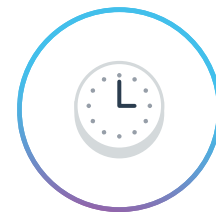
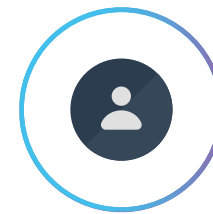Peak phone call times

Repeat vs. new call

Call outcome

02:34
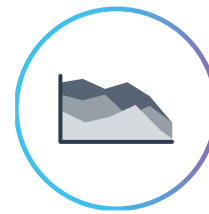Average call duration

Geographic location

Caller intent

Phone type

Demographic data

Start Tracking

Setting up Invoca's call intelligence to start tracking this data is simple. First you place a short snippet of code on your website. Then you build call intelligence campaigns that map to your marketing campaigns. To create call intelligence campaigns, you design the call treatment, designate the destination, and begin putting your phone number everywhere.

Your website will automatically populate a unique tracking number everywhere you want a phone number to appear. When the number is called, all session information is captured. With Invoca's APIs and integrations, you can make sure the data flows into all your other systems.

A B2B Marketer's Perspective
Q&A with Stephen Johnson, Digital Marketing Manager, Avalara

About Avalara

Avalara is cloud-based software that delivers a broad array of compliance solutions related to sales tax and other transactional taxes such as VAT and Excise. Avalara automates and simplifies governmental compliance processes for businesses of all sizes, including tax determination, exemption certificate management, and tax return filing and remittance.

What was the biggest challenge call intelligence helped you solve?

As a digital marketer I am responsible for gathering actionable insights about our website. The data surrounding inbound phone calls was not on par with the rest of our analytics.

Phone calls are a primary driver of new business for us. We wanted to see if there was a way to create more of them. To do that we knew we needed to understand what was actually driving these calls.

How do you use call intelligence with the rest of your technology stack?

We integrated Invoca's call intelligence with Salesforce allowing us to connect call data directly to lead records and contacts. Now in an automated and scalable way, we can tie all opportunities and deals to inbound phone calls and the marketing efforts that drove them.

How are you driving calls today?

Most of our customers call us while they are visiting our website.

With Invoca, we are able to measure the origin of these phone calls via the web, email, paid search or other marketing campaigns.

We have even incorporated phone call tracking into our Customer Success Programs. In a recent direct mail campaign, we included tracking phone numbers along with our customer account managers' email signatures. This allowed us to see how effective each account manager was at creating inbound phone calls, right in Salesforce.

What call intelligence data do you find most valuable?

We wanted to know which marketing efforts were most likely to result in a user picking up the phone. With call intelligence, we are able to see how our website, paid search keywords, email campaigns, and even our print collateral are influencing calls and revenue.

We also look at detailed caller profiles to see what type of prospects have the highest propensity to call. Now, I can look at data points like industry, job title, location, and other demographic details to target people who match that profile.

How does call intelligence make you more effective?

We are just starting to understand how our marketing campaigns are influencing inbound phone calls and it is exciting.

Having key insights about who's calling and the outcome of those calls, helps us measure marketing performance and hone our targeting and follow-up methods.

Personalizing Customer Engagement

Create Custom Call Experiences

Create individual caller experiences depending on the caller's online behavior and unique attributes. For example, you can treat repeat callers differently than new callers or create unique menu prompts depending on the call's marketing source. This kind of customization ensures that all calls are handled appropriately and that each caller has a tailored experience.

Leverage Conversation Analytics

Use conversation analytics to automatically import signals that occur during a phone call. Use conversation analytics to:

- Track conversions and sales
- Gauge competitor awareness
- Test sales scripts
- Trigger retargeting or nurturing campaigns

Send the Right Follow-Up Message

Drop customers and prospects into nurturing programs or retargeting campaigns based on their call activity. With visibility into the entire online and offline journey, you can make sure you send the right message at the right time. No longer risk retargeting a converted customer with a discount offer!

Putting Data Into Action

Now you have answers to questions like:

___

At what point in their journey do customers typically pick up the phone?

___

What segment of my audience is most likely to call?

___

How much revenue is my marketing campaigns generating through phone calls?

With these insights, you can start making a serious difference to your marketing ROI.

Double Down on Successful Campaigns

This is one of the easiest things you can do that will have the hardest-hitting impact. Start measuring marketing performance in terms of clicks and calls. Find out which keywords, campaigns, webpages, and media placements are driving the most calls, and double down on what's working.

Tie Revenue to Phone Calls

Measure success in terms of revenue, not just call volume. If your phone calls aren't translating into sales, they could be a drain on resources— in other words: negative ROI. Analyze your customer's entire journey (from first touch, to phone call, to sale) to make educated optimizations that won't just fill the funnel with garbage.

Analyze Conversion Paths

Determine common paths that end in phone calls. Do most people call right from a search ad or an email? Or do people visit your website before calling? Are there specific webpages or a point in the conversion process where they typically need to talk to a live rep? If you can spot trends, you'll know where you need to put your phone number and encourage offline engagement. Above your lead forms is a great spot.

Test and Optimize

Now it's time to start testing to maximize your quality call volume. Test the position, size, and style of your phone number. Test your calls to action, messaging, and overall design. All these digital elements can have a huge impact on call volume and quality.

Part 3

Integrating Call Intelligence With Your Marketing Stack

Call intelligence is one piece of the picture with a wide range of applications to support your unique business and marketing goals. Combining it with your other analytics and marketing solutions is how you get the full picture. Here are the most common integrations and use cases for B2B and B2C marketers.

Common Call Intelligence Integrations

Paid Search and Display Management

Some keywords are better at driving call conversions. Make sure you optimize these keywords by integrating call intelligence into your bid management solution.

Google AdWords • Kenshoo • Marin • Acquisio
DoubleClick Search • Adobe Media Optimizer

CRM

Attribute revenue to phone calls and the marketing campaigns that drive them. Enhance lead records with marketing and sales engagement history in real time.

Salesforce • Microsoft Dynamics

Marketing Automation

Deploy nurturing tracks or follow-up emails based on online and call activity. Your lead records will show call activity, and you'll see calls in the context of the entire path to purchase. This makes multi-touch attribution possible.

Eloqua • HubSpot • Marketo

Affiliate Tracking

Empower affiliates and marketing partners to drive calls to your business, and you won't lose any visibility, control, or quality assurance.

CAKE • HasOffers • LinkTrust

Data Management

Get to know your customers and prospects on a deeper level by bringing caller activity to your Data Management Platform, so you can create effective audience segments for targeting and personalization.

Turn • RocketFuel • Adobe Audience Manager

Web Analytics

Measure marketing success in terms of online and offline conversions and sales. Having a full view of your marketing performance gives you the power to prove ROI and make smarter optimizations.

Google Analytics • Adobe Analytics • Webtrends

A Partner's Perspective
Q&A with Sean Oliver, Senior Product Marketing Manager, Optimizely

About Optimizely

Optimizely is an enterprise-level experience optimization platform that provides A/B testing and personalization for web and mobile apps.

What challenge do Optimizely and Invoca solve?

For a lot of businesses, conversions are happening offline, which is especially true for mobile users who tend to be more inclined to jump offline with a phone call. With Optimizely and Invoca, you have the ability to see how your online visitors are converting downstream over the phone, which is an extremely important metric for our customers.

Why is it important to track offline conversions?

A lot of people can click on a button and complete an online action like downloading a whitepaper. But for many businesses, the more valuable conversion happens on the phone when the deal is in the later stage. With Optimizely's integration with Invoca, marketers can actually attribute inbound phone calls to their targeted website experiments and optimizations.

Do you have tips for marketers who want to start using their website to drive phone calls?

One of the best tips I have is to be mindful of your visitors' context and mindset. For example, device type plays a huge role in expectations and behavior. There is a lot less friction for a mobile visitor to make a phone call, so in these cases you want to include a phone call CTA over an online form-fill CTA.

Another piece of advice is to make sure you don't focus entirely on the message at the expense of the CTA. Make sure your CTA is prominent and clear so visitors know exactly why they should take an action, and what will happen when they do.

How can marketers use call conversions to inform the rest of their optimization and personalization strategy?

A lot of our customers are testing their content and customizing the experience to the visitor, tailoring the content depending on the visitor's industry, or serving up a unique CTA based on the context. By tracking call conversions, you can see exactly which variations are the most effective.

We've also seen customers use Invoca's integration to inform the actual phone conversation. This way, the salesperson has added context so they can have a more meaningful conversation tailored to the online experience.

And on the flip side, we've seen salespeople actually informing their marketing teams about what messages are working.

When should you encourage an online versus an offline interaction?

Having a good understanding of your audience segments and the channels they prefer is the first thing to think about. Then consider device type.

Offline interactions can also be a much more personalized experience, so if you have a product that is very specific or customized, it's better to encourage that conversion to happen offline.

How to Make a Case for Call Intelligence

## With call intelligence, companies can expect three core benefits:

- Increase in call volume
- Better lead quality
- Greater marketing ROI

The best part? It's easy to get started. Invoca's customers start seeing results in just a few weeks of implementation, and you don't have to change your phone number or do anything with your phone system.
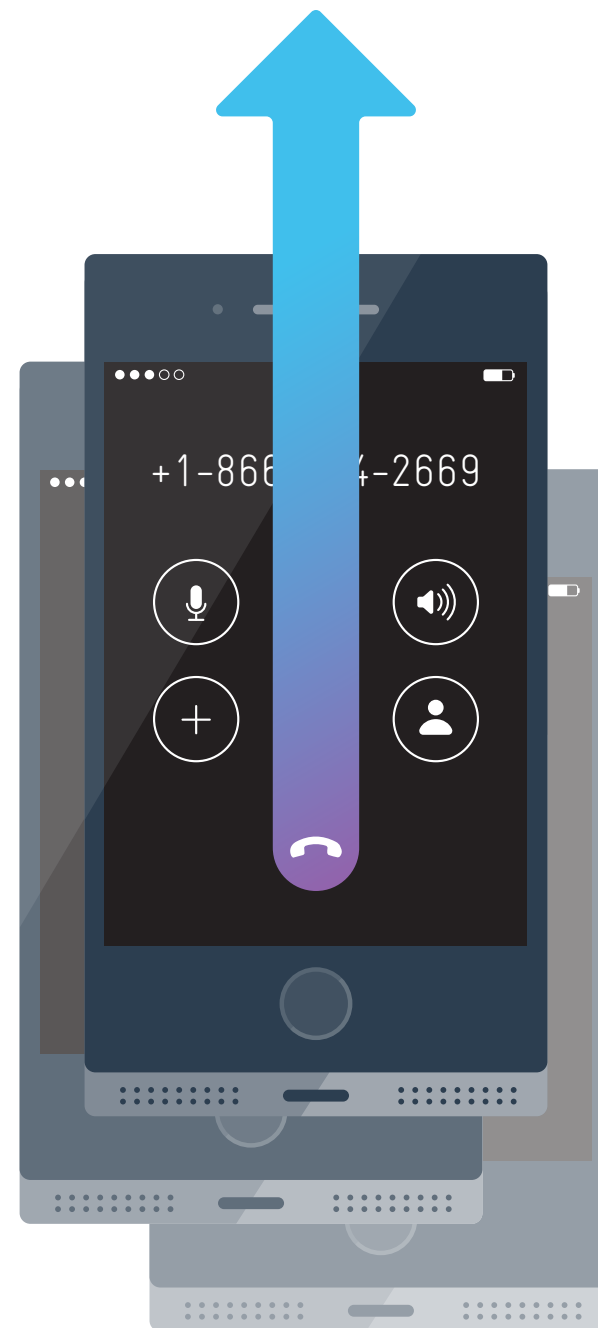
Increase in Call Volume

With insights into what drives phone calls, marketers know how to drive more. In 2014, Invoca's customers drove an overall increase of 28% in total call volume. Some customers individually drove an increase in call volume of up to 200%.
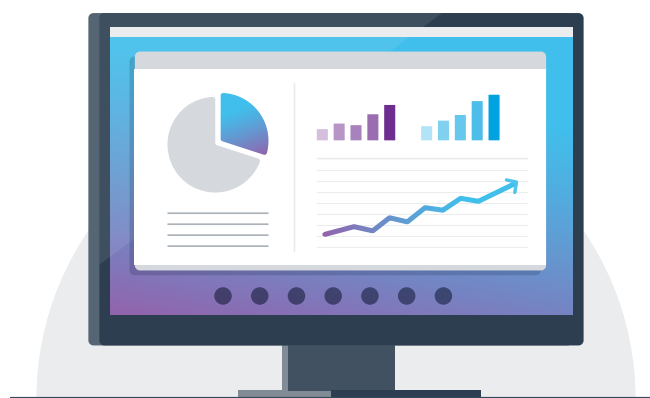

Q1	Q2	Q3	Q4
	↑ 4%	↑ 25%	↑ 28%
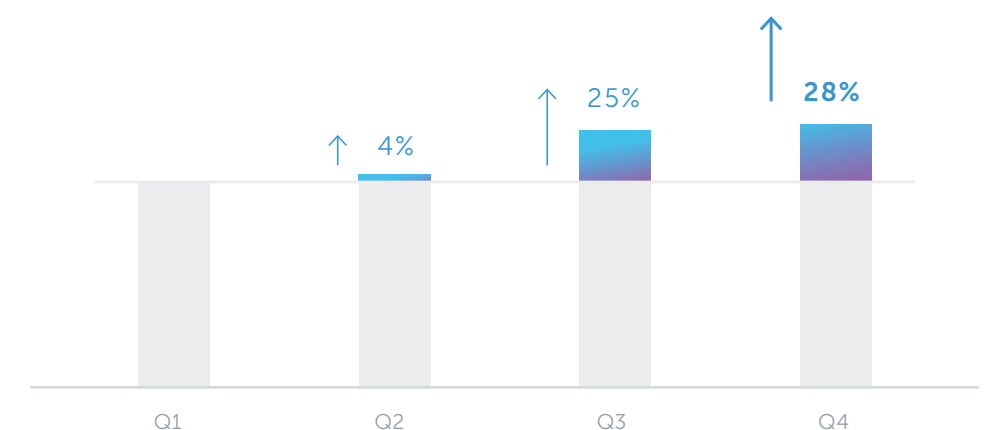
Average increase in call volume from Q1–Q4[4]

How to Make a Case for Call Intelligence

Better Lead Quality

Phone calls give you the benefit of connecting with your best leads in real time. In fact, 66% of marketers rate phone calls as the highest-quality lead source, beating out both online lead forms and in-person interactions. Call intelligence also give you the insights to improve the entire customer journey so you can get more of those high-value customers calling.

50% CALLS VS. **2% CLICKS**

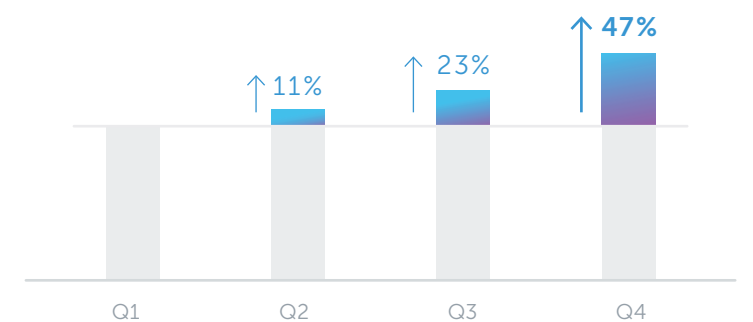Phone calls have **30–50%** conversion rates, compared to only **1–2%** for clicks.[4]

Greater Marketing ROI

With an increased volume of high-quality leads, you'll see your marketing ROI jump. Invoca's customers use call intelligence to increase the return on nearly every marketing channel—email, search, affiliate, mobile, and display—by actively driving phone calls and using the insights from call intelligence to constantly improve. On average, Invoca's customers drive a 47% increase in revenue generated from phone calls within the first year of using call intelligence.

↑ 11%   ↑ 23%   ↑ 47%

Q1   Q2   Q3   Q4

Increase in revenue from phone calls[5]

Conclusion

In a world gone mobile, call intelligence cannot be relegated to the fringes of your marketing strategy. Whether you're a B2C company with millions of calls a year or a B2B company that gets a handful of calls a day, call intelligence is the technology that will transform those calls from a black hole of information to your richest source of insights.

If you'd like to see what call intelligence can do for you, call 855-826-4377 or **click here** for a custom demo!

1, 2 BIA/Kesley, Phone Calls: The New Ad Currency of the Smartphone Era

3 Google, The Role of Click to Call in the Path to Purchase

4, 5 Invoca, 2015 Call Intelligence Index