

CallRail

A getting started guide to

Using Conversation Intelligence

Conversation Intelligence extracts valuable insights from your calls

We personally built our Conversation Intelligence platform using millions of phone calls to ensure our scoring and categorizing methods are relevant to you, your business, and the customers we serve. These features were created from a human-scored dataset that analyzed and organized millions of insights from phone calls for an unmatched level of conversation analytics.

Eliminate hours spent tediously reviewing every call recording. Use call transcriptions to understand what happens on your calls and correlate your marketing channels with high-value leads.





Get an automated, detailed analysis of your conversations

Our Conversation Intelligence engine automatically qualifies phone leads on your behalf by reviewing and transcribing your inbound calls. Using specific details about your calls, we'll show you which callers are leads and which keywords were used during your calls.

Spot trends and opportunities

Using your call transcriptions, we'll instantly categorize and score your calls, and identify keywords that are meaningful to your business.

Each call recording we capture is a dual-channel recording. This means we've separated the caller's side of the audio from your agent's side of the audio and isolated background noise before our system transcribes the call.

In this quick getting started guide for Conversation Intelligence, you'll learn:

How to set up Conversation Intelligence

Best practices for analyzing the data you collect

How to download and report on the transcriptions

SECTION ONE

Setting up Conversation Intelligence

Conversation Intelligence is a suite of features that enable you to better understand your lead quality. Conversation Intelligence includes CallScore, Transcripts, and Keyword Spotting. Throughout this guide, we'll show you tips and tricks for setting up and maximizing each aspect of using Conversation Intelligence.

In this section you'll learn how to set up:

- CallScore
- Transcripts
- Keyword Spotting for Calls, Texts and Forms
- Tags for Calls and Form Submissions

All of our conversation intelligence technology is powered through call recordings. Before we begin, ensure you have call recording turned on for tracking numbers that you wish to use these features on. For more information on setting up call recording, read these [instructions](#).

CallScore

Qualify and score calls automatically with CallScore.

CallScore utilizes our automated conversation intelligence technology to qualify and score calls as soon as they end. Our specialized conversation intelligence engine discovers the marketing campaigns bringing the most valuable leads so you can understand how your inbound calls turn into appointments, opportunities, and sales.

Once a call is automatically scored, you can see the caller's score within your activity dashboard, email notifications, and call details pages.

Call recording will need to be enabled for tracking numbers that use CallScore.

Follow these [instructions](#) for each company where you'd like activate CallScore.

Once you've activated CallScore for your account, you can view and change any call's score from your call log, caller timeline, or Lead Center. Use this set of [instructions](#) to learn how to find or updated a call's score on the log.

Timeline > Elizabeth Griffin

CALLS
Call Log
CallScribe Search
Unique Callers
Voicemail

TEXTS
Text Conversations

FORMS
Form Submissions
Search Submissions

Elizabeth Griffin
213-209-8354
Los Angeles, CA

Total Interactions: 18
First Call: Oct 9, 2019 1:40pm

Tracking Number: Main Pool
Initial Source: Google Organic

2:17 PM Inbound Recorded Call

Highlights: ASAP, whistling, diagnoses, repairs

Keywords Spotted: appointment, schedule, quote, service fee

Customer: issue, stopped working, ABC 1000 Pro, estimate

Hi, Thank you for calling ABC Heating and Air. How may I help you today?

Hello, I have an issue with my AC unit. It suddenly stopped working and is making a whistling noise.

I can help you with that. It sounds like we need to schedule an appointment for someone to take a look. What type of unit do you own? And do you prefer morning or afternoon appointments?

Transcripts

[Read full conversations using Transcripts.](#)

Built on voice recognition software, our Transcripts feature relies on machine transcription technology to give you instant results that would take humans hours to uncover. By using Transcripts, you'll be able to gather the content of any call without having to spend time reviewing the call's recording. We'll automatically transcribe calls and find keywords, giving you the additional context you want about your phone call leads. You'll now be able to search all calls from any campaign, PPC search keyword, or geographic location for the words that matter to your business.

You can measure customer satisfaction, understand the context of a call without listening to a recording, and further streamline your process of categorizing and scoring calls.

Available in the caller's timeline, you can snap to important points in the conversation by clicking on the call recording's waveform and read the entire call transcript without having to listen to the call. A preview of each call's transcription is available in the call notification email you receive. You can click the link in the email to be redirected to the caller's timeline, where you can read the full transcript of the call.

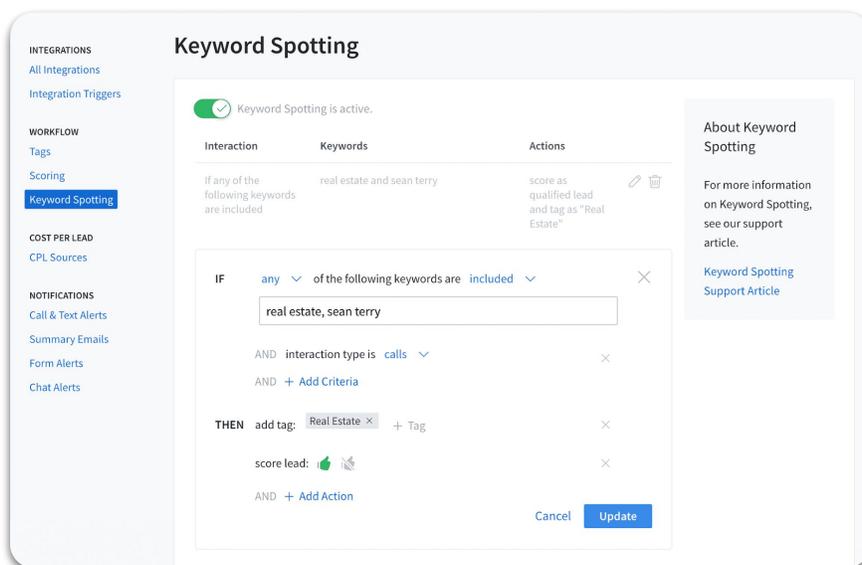
Follow these [instructions](#) to learn how to set up Transcripts.

Keyword Spotting for Calls, Texts, and Forms

[Use Keyword Spotting to target specific words in your calls and forms.](#)

Keyword Spotting pulls from your transcripts to instantly identify custom keywords and categorize calls for automated, detailed analysis of conversations. After the criteria and keywords associated with leads and customers are identified, Transcripts will automatically tag relevant calls. Gain deeper insights by seamlessly integrating spotted keywords with analytics platforms.

When you set up Keyword Spotting, you'll choose which words or phrases you want to target, and can then add specific tags, score the call as a qualified or unqualified lead, and apply a value based on your own customized workflows.



Use these [instructions](#) for each company where you'd like to activate Keyword Spotting for calls and text messages.

Form Submission
 Nov 14, '18 12:49 PM
 Completed: 6 of 6
 Source: Google Organic
 Keywords Spotted: appointment
 Referrer: https://www.google.com.au/
 Landing: https://www.callrail.com/
 Form URL: https://www.callrail.com/request-a-demo/
 Qualified:
 Value: +
 Tag: +

Form Contents

- *First Name: Evelyn
- *Last Name: Jackson
- *Work Email: Evelyn@ignitevisibility.com
- *Company Name: Ignite Visibility
- *Phone Number: 832-258-1944
- Comments: I'm looking forward to scheduling an appointment with you to learn more.

Keyword Spotting also automatically identifies specific words submitted in a form for easier organization and reporting on your leads. You can choose which words to target from your form submissions and tag, score, and apply values to those leads based on your own customized workflows. Keyword Spotting for Forms is included in all plans that include our Form Tracking product.

Keywords Spotted

Total Calls for Apr 14, 2020 - May 14, 2020 Eastern Time

Keywords Spotted: you

Keyword Spotted	Total Calls	Inbound Calls	Outbound Calls	Answered Calls	Missed Calls	Voicemails	Qualified Calls	First-Time Callers	Returning Callers
you	55	52	4	35	20	20	48	7	49

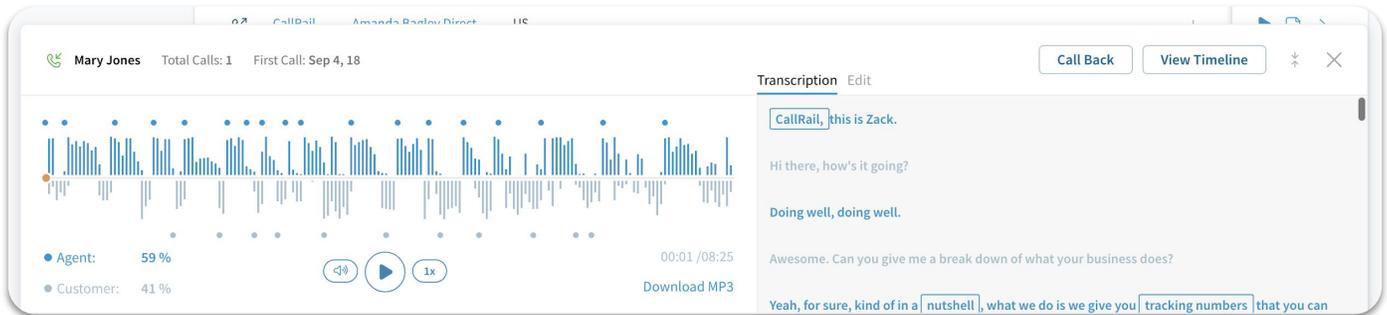
Calls for Mar 9, 2020 - Apr 8, 2020 Eastern Time

Keywords	Total Calls	First-Time Callers	Qualified Calls	Average Duration
sports store dallas	12	6	8	4m 33s
neon shop texas	10	5	8	3m 56s
custom neon signs	9	4	7	5m 21s
neon shop near me	8	4	4	4m 47s
cost of neon sign	7	3	3	3m 58s

Use these [instructions](#) for each company you'd like to activate Keyword Spotting for form submissions.

Call Highlights

Call Highlights are relevant words from the call transcription that are automatically spotted. Once you receive calls to tracking numbers that are using Transcripts, you can read and interact with the caller’s transcript and see highlighted keywords on their timeline. With little to no insight into your organic searches, Call Highlights lets you see trends and popular words from your calls to better optimize your SEO without guessing.



To learn more about Call Highlights, read these [instructions](#).

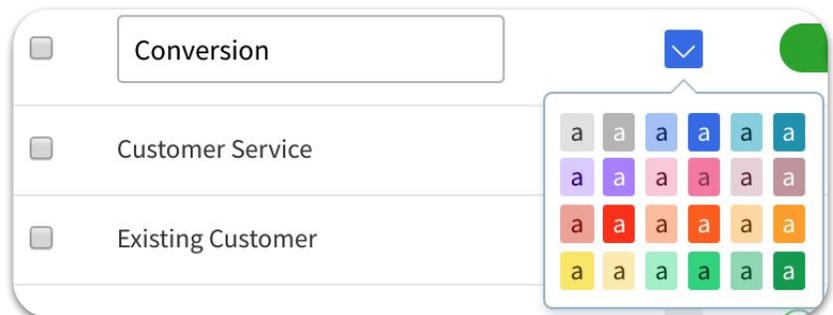
Tags for Calls and Form Submissions

Tags are a helpful way to sort and categorize your calls and form submissions. Each company in your account has its own set of tags that can be created, edited, and color-coded to help you sort your data faster. There’s no limit to how many tags you’re able to add to a company—you can also assign multiple tags to a single call or form.

Applying colors to each of your tags lets you quickly differentiate between the types of calls and forms you receive—by default, the background color of any tag is gray, but you can choose different colors to each set of tags in each company. Once a color has been assigned to a tag, all assigned tags will update to reflect the new color.

Follow these [instructions](#) to configure tags for a specific company within your account.

You can apply a tag to a call or form submission from several places within CallRail—read these [instructions](#) to learn more.



Additionally, to learn more about adding a call value, check out these [instructions](#).

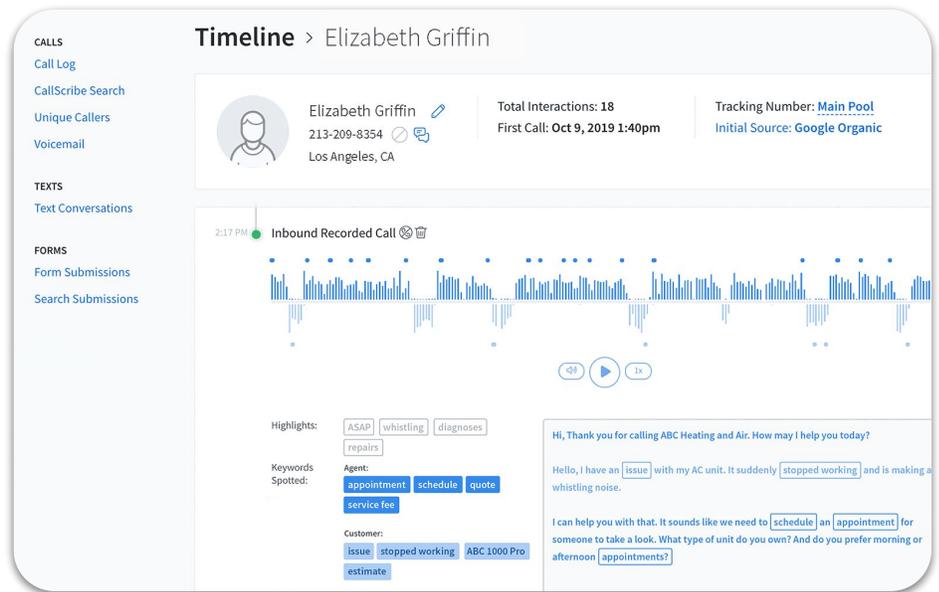
SECTION TWO

Viewing the data

Visitor Timeline

To learn more about an individual call, text, or form submission, you'll view their Visitor Timeline. This will show you person-level information on how a lead has interacted with your business over time. You'll see what source originally drove the lead, as well as keyword and web session data, if you're taking advantage of our Keyword-Level Call Tracking.

When diving into an individual call, this is where you'll see Conversation Intelligence come to life. Below the call recording, to the right you'll see Transcripts in action. You can quickly scroll to read the conversation and see what important keywords and phrases have been spotted in your call. To the left, you'll see where CallScore has qualified or unqualified the lead, as well as see where you can add a note, tag, and value to the phone call.

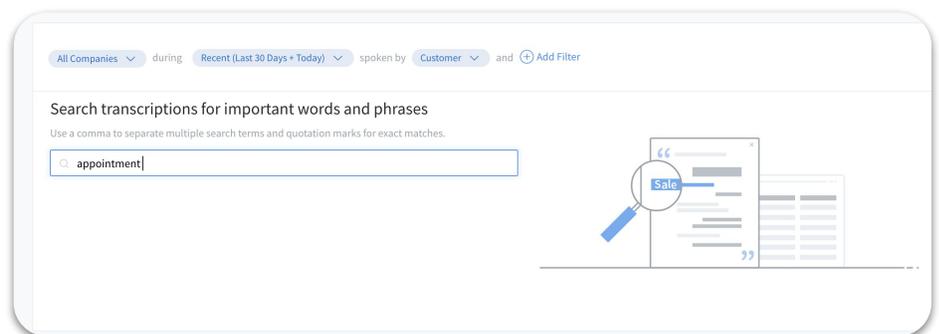


Transcripts Search

Transcripts Search is a tool for quickly searching your call transcriptions for important information. You can search your transcribed calls from the past year to find specific words, phrases, or set of search terms for a deeper analysis of your calls and to quickly return a list of relevant calls from your call log.

Please note, Transcripts and call recording must be activated in your account before you can use Transcripts Search. Use these [instructions](#) to access Transcripts Search in your account.

You can search your call transcriptions for any terms, whether or not you've added them to one of your keyword spotting sets. Using Transcripts Search might help you discover new keyword sets to leverage or even new PPC keywords and/or ad copy for better audience targeting.



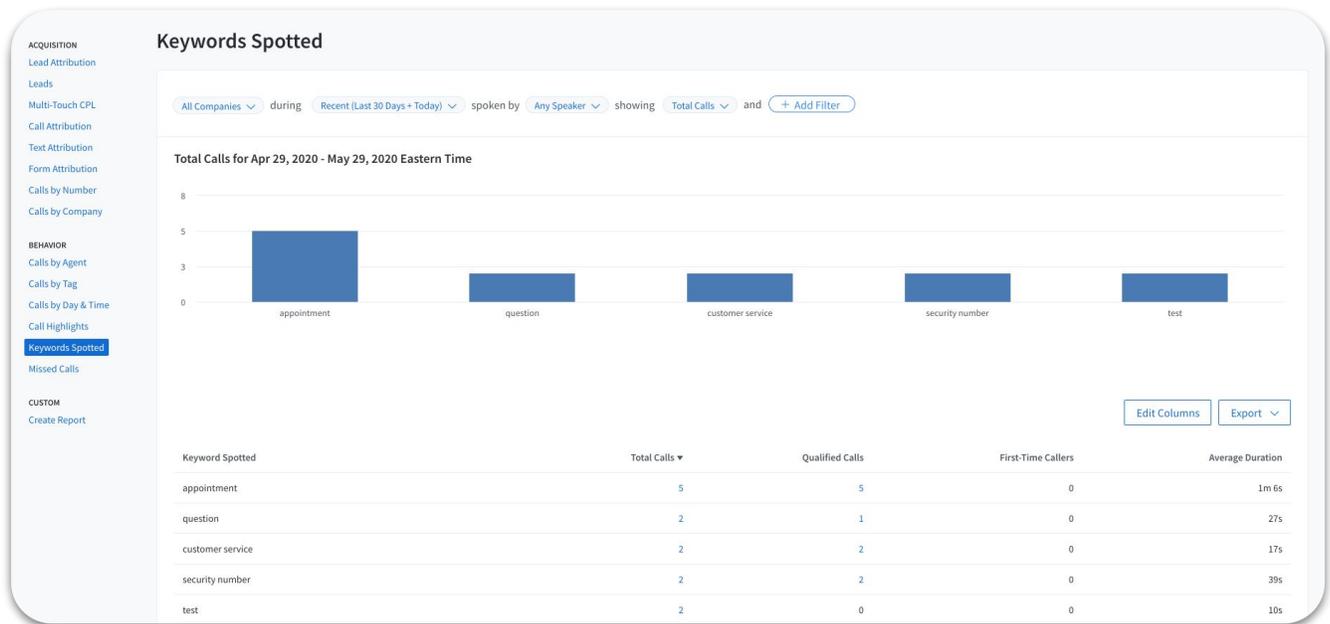
SECTION THREE

Reporting

To see higher-level information about your most common spotted keywords and call highlights, you can use our Keyword Spotted and Call Highlights reports.

Keyword Spotted Report

The Keyword Spotted report provides a full breakdown of the targeted keywords that are used in most calls to your business. The report also shows how many of the calls featuring your keywords were marked as qualified leads. You can use the Keywords Spotted report to see all of the calls where a specific keyword was used and to further optimize your marketing process.



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

Call Highlights Report

The Call Highlights report provides a full breakdown of the important keywords that are automatically spotted in calls your business receives. The report can also display how many of the calls featuring highlighted words were marked as leads. You can use the Call Highlights report to see all of the calls where important keywords were automatically spotted and to further optimize your marketing process.



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