

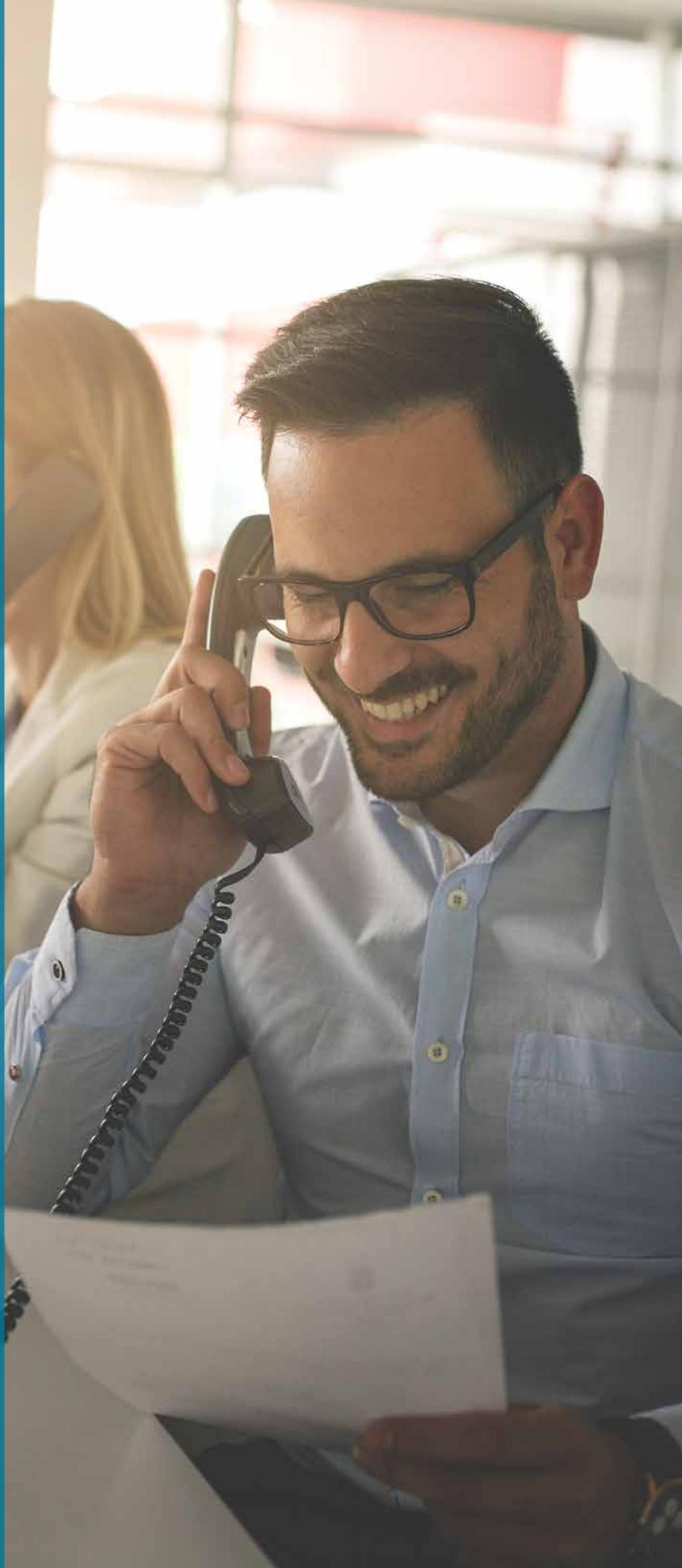
MARTECH INTELLIGENCE REPORT

ENTERPRISE CALL ANALYTICS PLATFORMS: A MARKETER'S GUIDE

EIGHTH EDITION

A MARTECH TODAY RESEARCH REPORT

MARTECH TODAY®



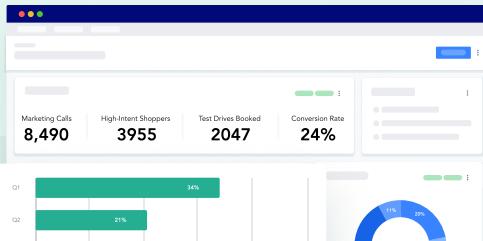
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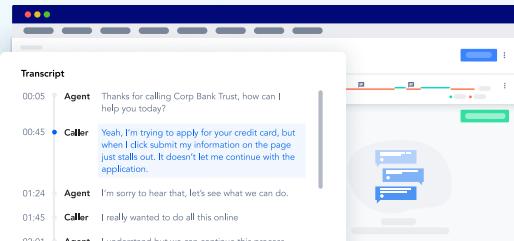
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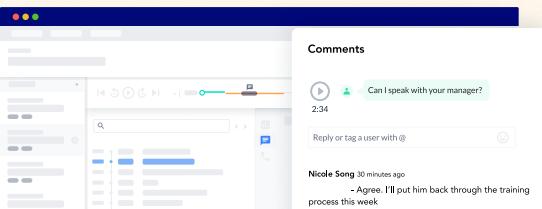
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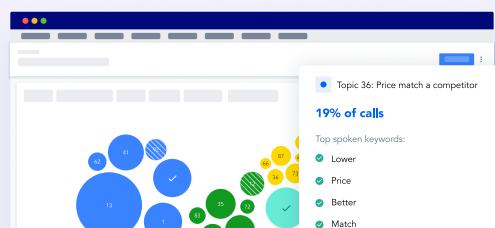
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Scope and methodology

This report examines the current market for enterprise call analytics platforms and the considerations involved in implementing this technology. This report answers the following questions:

- What trends are driving the adoption of enterprise call analytics platforms?
- Does my company really need an enterprise call analytics platform?
- What capabilities do enterprise call analytics platforms provide?
- Who are the leading players in enterprise call analytics?
- How much do call analytics platforms cost?

For the purposes of this report, the term "enterprise call analytics" describes software that manages the inbound phone channel (including both landlines and mobile phones), from assigning call tracking numbers to measuring, monitoring, analyzing and reporting the resulting caller data and campaign results. Enterprise call analytics platforms provide call tracking, recording, routing and attribution tools to enable these functions. This report is for marketers seeking to optimize inbound phone calls, rather than creating operational efficiencies in the call center.

If you are considering licensing an enterprise call analytics platform, this report will help you decide whether or not you need to. The report has been completely updated since its June 2020 publication to include the latest industry statistics, developing market trends and platform updates.

This report is not a recommendation of any call analytics company, and is not meant to be an endorsement of any particular product, service or vendor. None of the 11 vendors profiled paid to be included in this report. Vendors were selected based on their roles as industry leaders in enterprise call analytics or because their entire revenue comes from enterprise call analytics software and services. Enterprise call center systems that focus on operational efficiency and are offered by vendors such as Aspect, Calabrio and SAP are beyond the scope of this report.

Our purpose is to look at pure-play call analytics platforms for large and mid-size enterprises, with a particular eye toward how they are managing and monetizing inbound phone calls. Third Door Media conducted numerous in-depth interviews with leading vendors and industry experts in October and November 2020. These, in addition to third-party research, form the basis for this report.

January 2021

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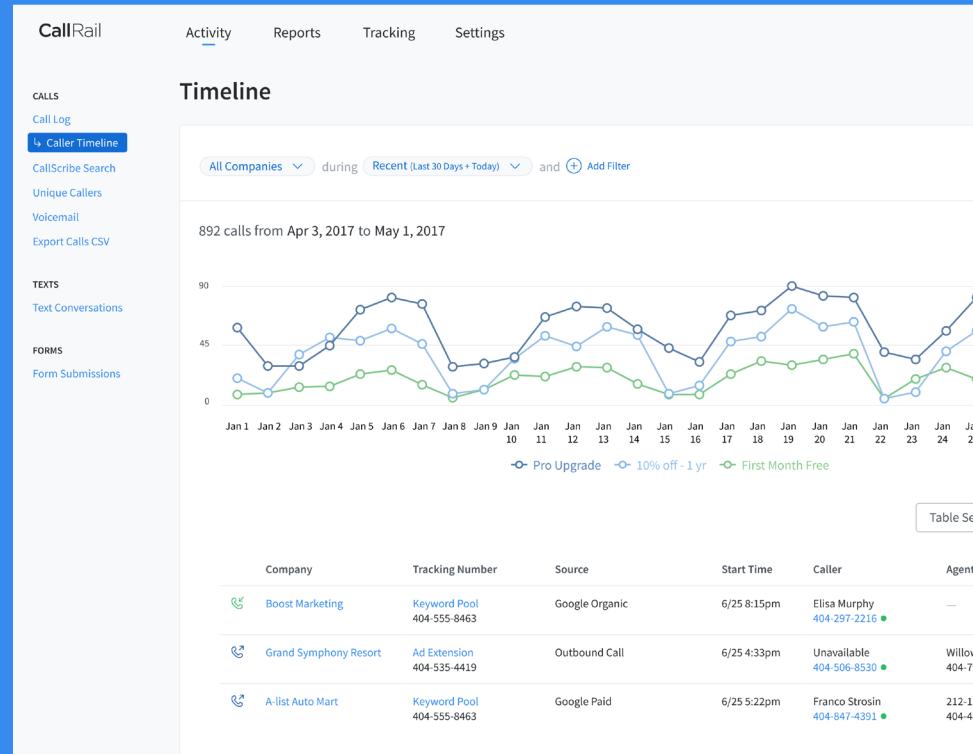
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Call analytics market overview

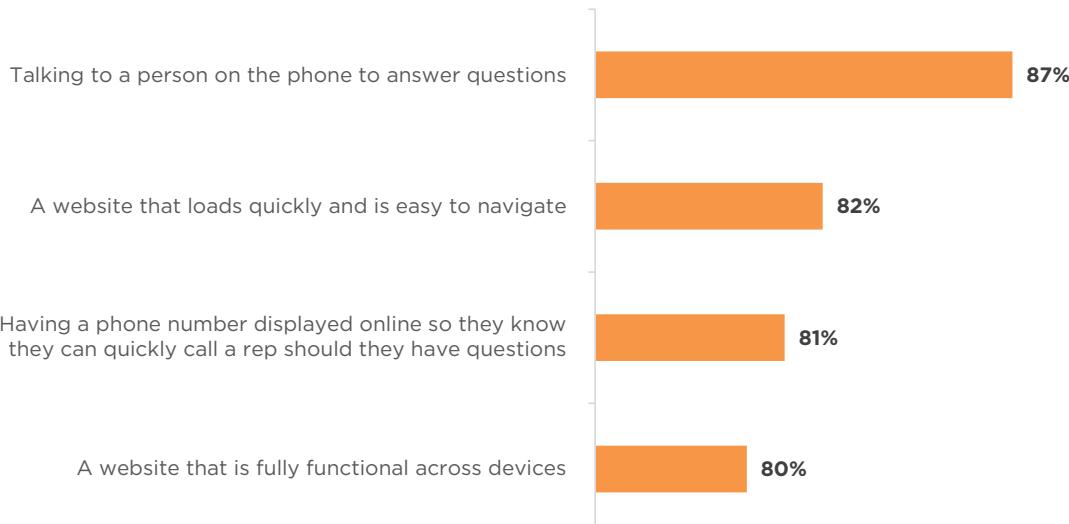
Even before the coronavirus pandemic disrupted American lives and businesses, the telephone – particularly the smartphone – had become an integral part of the consumer purchase journey. More than 170 billion inbound mobile calls to U.S. businesses were forecast in 2020, according to BIA Advisory Services.

When faced with the worst public health crisis in more than a century, U.S. consumers used the telephone more than ever before. During the first half of 2020, Google My Business recorded a 61% jump in consumer calls, from inquiries about open hours to arrangements for curbside pickups. For the 12 months ending June 2020, call volume increased 35% and continues to track 27% higher than pre-pandemic levels.

For the vast majority of consumers, talking on the phone to a person who can answer their questions makes them feel more confident about their purchases (see Table 1). Phone calls provide businesses with an opportunity to offer deep-in-the-funnel prospects fast answers, connections to real people and the type of detailed information that plays an important role in high-consideration purchases.

Phone calls provide businesses with an opportunity to offer deep-in-the-funnel prospects fast answers, connections to real people and the type of detailed information that plays an important role in high-consideration purchases.

Table 1: What makes consumers feel more confident in their purchases?



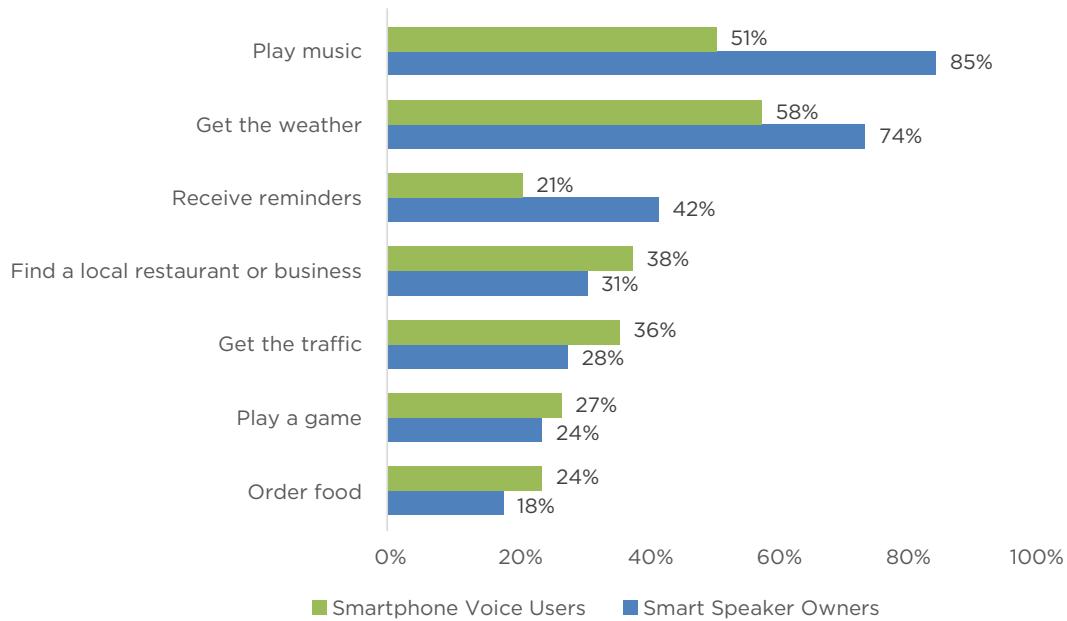
Source: *High-Stakes Purchases and Consumer Confidence in the COVID Era*, November 2020

AI-driven technologies, including smart speakers, virtual assistants (via smartphones), chatbots and messaging apps are also driving mobile calls to businesses, although the marketing value of these calls is still being debated. The U.S. installed user base of smart speakers reached nearly 90 million adults in January 2020, a 32% year-over-year increase, according to the *Smart Speaker Consumer Adoption Report 2020*. Although both smart speakers and virtual assistants are most frequently used for music, weather, directions, games and setting alarms, about one-third of users are connecting with local businesses, including restaurants or personal services providers (see Table 2).

Google's Duplex enables users to tell Google Assistant to book reservations or check business hours for participating local restaurants. The service began testing in four U.S. cities in June 2018 and is currently available in 48 states. In May 2019, Google introduced CallJoy, an inexpensive virtual agent and telephony product targeting small and medium-sized businesses (SMBs). Using the same technology as Duplex, CallJoy provided automated customer service and call intelligence capabilities designed to block spam and convert more business by ensuring that all calls are answered. Google shuttered the SMB service in July 2020.

Marketers that are able to mine phone conversations for keywords spoken, caller intent and conversions can make important connections between phone calls and the digital campaigns that drive them.

Table 2: Typical tasks for smart speaker owners vs. smartphone voice users



Source: *The Smart Audio Report Spring 2020* published by National Public Media

As a result, inbound phone calls have become fundamental to many digital marketing strategies, and the conversations that occur provide valuable insights into caller wants and needs. Marketers that are able to mine phone conversations for keywords spoken, caller intent and conversions can make important connections between phone calls and the digital campaigns that drive them. Forrester Research found that 85% of marketers believe inbound calls are a key component of their organization's digital-first strategies. In addition, 84% of marketers report that phone calls convert at a higher rate and with larger average order sizes when compared to other engagement channels.

Call analytics platforms expand use cases

Call analytics platforms have become important tools to help marketers identify and activate the rich data hidden in the growing volume of inbound calls. Call analytics platforms track both online and offline leads, following a call from its source (i.e., website, social media and click-to-call search or display ads) to a sales representative (i.e., based on geographic location or product line). The ability to track calls is a core use case of call analytics technology. However, advances in machine learning and artificial intelligence (AI) are driving more sophisticated applications, including the following:

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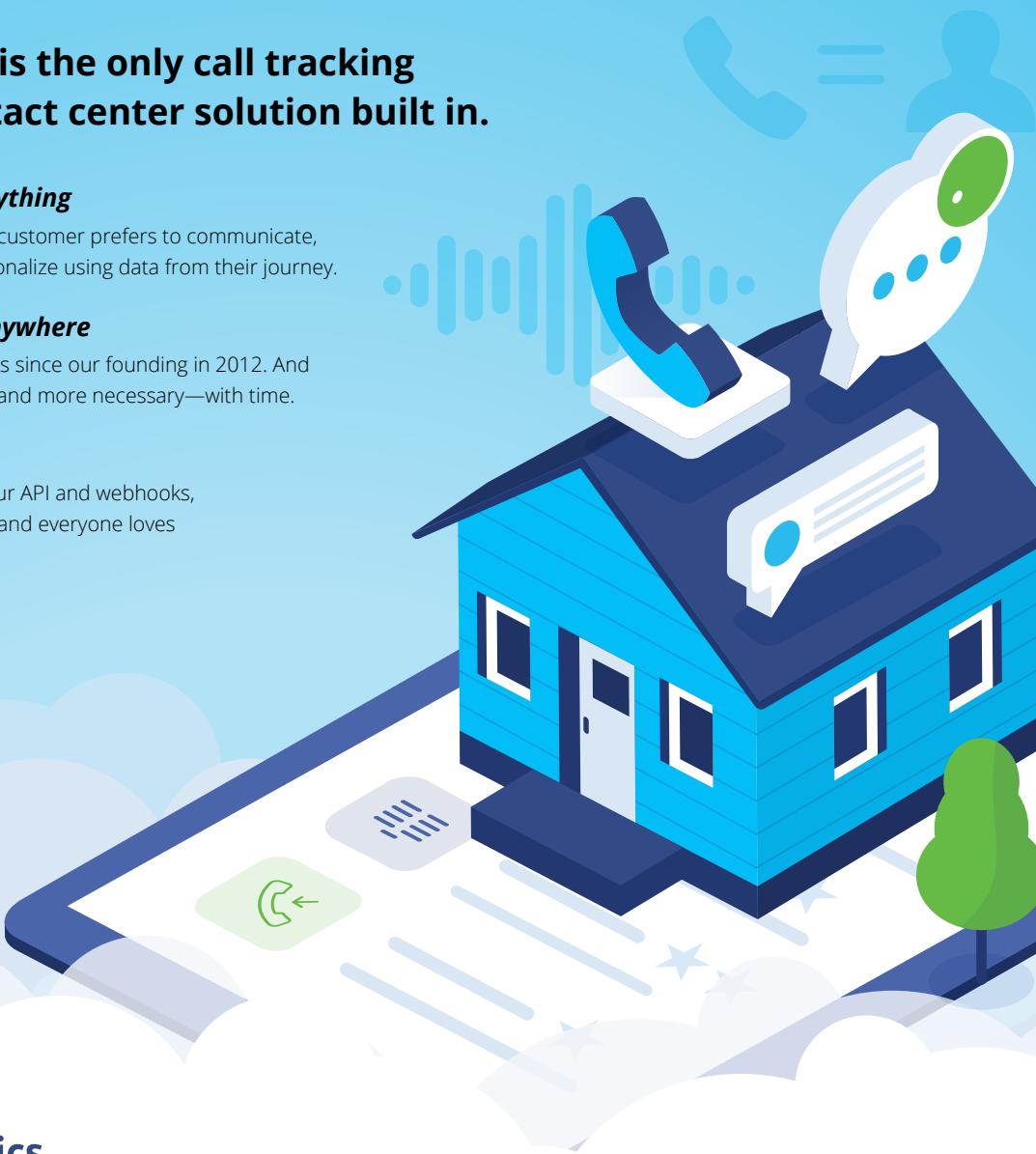
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- First-party database-building:** As marketers lose access to third-party cookie data, first-party data sources such as phone calls are becoming more valuable in brand efforts to build privacy-compliant customer databases. Call analytics platforms facilitate the scaled collection and analysis of caller data.
- Customer journey attribution:** Call analytics platforms provide online-to-offline attribution across media channels, helping marketers understand the role that each customer touchpoint plays in a conversion. The result is more efficient resource allocation and more relevant messaging based on customer preferences.
- Marketing campaign optimization:** Call analytics platforms connect calls to the search keywords, social display ads or webpages that drove them. Marketers can use unique phone numbers for each website visitor to understand which pages and elements are driving the highest quality calls, as well as which ones are causing visitors to leave. Call data, including demographics, product interests and buying stage, can also be used to optimize search bids or make on-the-fly changes to campaign messaging and creative.
- Audience segmentation and targeting:** Call analytics platforms record and transcribe calls, then apply AI-based models to the results to determine the characteristics of the highest-performing callers or leads. Using the data, marketers can build personas or look-alike audiences to create high-performing customer segments.
- Personalized, intelligent lead routing:** Call analytics platforms use machine learning to score and route calls based on factors including call source, geography, demographics, purchase history or intent. Tools such as whisper messages arm sales reps with known customer information that personalizes the caller experience.
- Sales rep coaching and development:** Many call analytics platforms include automated sales performance and evaluation tools to provide scoring/grading systems, script optimization and real-time alerts that flag lost opportunities.

Privacy concerns make call data governance a priority

But as marketers use more sophisticated technologies to gain greater access and insight into consumer intent and behavior, call data privacy has become a growing issue for digital marketers, particularly those in the healthcare and financial services markets. Marketers must comply with the Health Insurance Portability and Accountability Act (HIPAA) and Health Information Technology for Economic and Clinical Health (HITECH) regulations. U.S.-based marketers with European prospects or customers are subject to the European Union's (EU) General Data Protection Regulation (GDPR), and, in January 2020, the California Consumer Privacy Act (CCPA) went into effect. By November 2020, California residents approved an update to the law, the California Privacy Rights Act of 2020, which expanded consumer rights and imposed new data requirements on businesses.

These regulations are driving an expanded brand focus on data governance, with a view toward complying with new standards for the benefit of consumers, as well as marketers. The majority of call analytics platform vendors profiled in this report comply with CCPA and GDPR and have clear policies for consumer consent on how their data is used. Many vendors automatically redact personally identifiable information (PII) and consumer financial information from call recordings and transcripts to conform to the Payment Card Industry Data Security Standards (PCI DSS), a set of security standards designed to ensure that companies that accept, process, store or transmit credit card information maintain a secure environment. Several vendors use security measures such as data encryption and two-factor authentication. Others invest in third-party data security audits through organizations such as TrustArc, a technology compliance and security company.

Call analytics platforms record and transcribe calls, then apply AI-based models to the results to determine the characteristics of the highest-performing callers or leads.

Vendors focus on AI-driven features in mature market

The U.S. call analytics platform market includes about a dozen vendors that have primarily relied on venture capital and private equity investments to fund growth (see Table 3). Marchex (NASDAQ:MCHX), the sector's lone publicly held company, has led some market consolidation by acquiring competitors Telmetrics and CallCap in November 2018 for a combined \$48 million. In October 2020, Marchex initiated a joint and equal tender offer with Edenbrook Capital to purchase up to 10 million shares of its Class B common stock. Earlier, in August 2020, the company announced its intent to divest its Local Leads platform and Call Marketplace in an effort to focus the business on its AI-driven conversational analytics and sales engagement solutions.

Manchester, U.K.-based ResponseTap, which operates a New York office, launched a *Speech AI* product in September 2020, designed to use advanced machine learning to more accurately capture call outcomes. In July 2020, CallRail announced its own enhanced *Conversation Intelligence* product, with new AI-based call transcription and word cloud visualization and reporting features. The company also received a \$56 million investment in December 2020 from existing investors Sageview Capital and Leaders Fund.

Invoca, which raised \$56 million in an October 2019 Series E led by Upfront Ventures, announced several new solutions one year later to expand its reach into e-commerce, customer experience and sales organizations. In addition, the company unveiled the Invoca Exchange, an ecosystem of 40+ technology and lead generation partners to facilitate integrations with leading martech and adtech platforms.

The U.S. call analytics platform market includes about a dozen vendors that have primarily relied on venture capital and private equity investments to fund growth.

Table 3: Selected call analytics platform vendors

Vendor	Founded/Rebranded	Employees	VC Funding
AddSource	2012	5	NA
CallRail	2011	197	\$132M
CallSource	1991	100+	NA
CallTrackingMetrics	2008	55	NA
Convirza	2001 (LogMyCalls)/2015	78	\$29M
DialogTech	2005 (Ifbymobile)/2015	150+	\$60M
Infinity	2010	100	NA
Invoca	2008	200+	\$100M
ivox	2007	50	NA
Marchex	2003	250+	Publicly held (NASDAQ: MCHX)
ResponseTap	2008 (AdInsight)/2013	80	NA

NA=Not applicable

Source: Third Door Media



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— Chuck Weaver, Senior Manager of Business Initiatives at GE Appliances



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— Bryan Huber, Worldwide Vice President, Digital Marketing at Comfort Keepers



"DialogTech has been a great partner in helping us understand our call volumes, showing us if people are calling to make or cancel appointments."

— Courtney Harris, Digital Marketing Manager at ATI Physical Therapy

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Enterprise call analytics platform capabilities

The enterprise call analytics platforms profiled in this report offer a core set of capabilities focused on call tracking, recording, scoring, routing and fraud prevention. Dynamic number insertion (DNI) is used to enable marketers to assign unique phone numbers to different digital marketing campaigns in order to track the source of an inbound call. When a consumer clicks through to a site from an online ad, DNI technology displays the phone number that's unique to the specific search engine, webpage, keyword or other source. Vendors offer DNI by call source, online session or URL. The ubiquity of mobile calls to businesses has led to increased demand for local numbers or extensions that are dynamically generated based upon the consumer's location, without jeopardizing the accuracy of name-address-phone (NAP) information for SEO purposes.

Call fraud prevention is another important feature, as automated dialers, fax machines and even computer programmers can hack into carrier networks to fraudulently inflate call volumes and revenue for pay-per-call services. In response, vendors have developed proprietary call fraud detection and prevention tools that identify, monitor and block suspicious call patterns and routes.

Vendors begin to differentiate their platforms by offering more advanced capabilities, often requiring additional investment, which include – but are not limited to – the following:

- Multichannel attribution;
- AI-based speech analytics;
- Intelligent (machine learning-based) lead scoring and routing;
- Native social analytics integration;
- Sales rep performance evaluation;
- Data privacy compliance; and
- Martech ecosystem integration.

The following section discusses each of these capabilities and the key considerations involved in choosing an enterprise call analytics platform (see Table 4).

Multichannel attribution

All of the call analytics platforms profiled in this report offer some level of call tracking that enables users to attribute the source of a call back to a specific ad, keyword or webpage. By tracking inbound calls from their sources, call analytics platforms provide an important link between online and offline channels, and allow marketers to more accurately measure the ROI of their multichannel marketing campaigns. Some vendors are offering more sophisticated attribution tools that can identify call sources beyond search – including native social ads and display ads that don't include a click-to-call button. The goal is to more effectively allocate spending across marketing channels, and establish a more accurate link between digital campaigns and offline conversions.

AI-driven speech analytics

Call analytics technology has evolved from providing basic analytics to providing "conversation intelligence" based on AI-driven algorithms that extract and predict caller intent, and measure caller tone, sentiment and emotion. AI is increasingly being applied to analyze and "spot" keywords, phrases and speech patterns for positive or negative signals of conversion intent. These signals can also include the length of time a caller speaks versus how long the sales rep speaks. Many call analytics platforms use a variety of natural language processing (NLP) and machine-learning algorithms to automatically assess calls and score leads. The results can be used immediately to help sales reps on the call by using whisper messages heard through the rep's headset to influence call outcomes. The data can also be used post-call to feed CRM systems and trigger nurturing campaigns.

All of the call analytics platforms profiled in this report offer some level of call tracking that enables users to attribute the source of a call back to a specific ad, keyword or webpage.

Intelligent call scoring/routing

Machine learning-based or "intelligent" lead scoring and routing systems are now being used to optimally route a call to the rep or location most qualified to close a sale or other conversion action (i.e., make an appointment). These types of scoring and routing tools automatically qualify and distribute calls to the appropriate sales reps or departments based on variables such as caller source (i.e., website, social media, search ad), geography, demographics (i.e., age, gender, income) or intent. Some of the tools used in intelligent call scoring and routing include interactive voice response (IVR), which prequalifies callers before they are routed to a rep through a short series of automated questions, and whisper messages that alert reps to relevant caller data before they pick up the call. Calls can be tracked through the system to follow conversions and other qualifying events.

Call analytics platform vendors are leveraging the growth in native social advertising and click-to-call to more seamlessly integrate social media and call analytics.

Native social analytics integration

Call analytics platform vendors are leveraging the growth in native social advertising and click-to-call to more seamlessly integrate social media and call analytics. Virtually all of the vendors profiled in this report offer Facebook and Instagram call tracking to attribute calls back to social media ads. Several vendors also use Facebook's offline conversion API to integrate their call data directly into Facebook ad campaigns through the Facebook Ads Manager.

Sales rep coaching/evaluation

Several of the call analytics platform vendors profiled in this report are rooted in sales coaching and evaluation, and use call recording tools to maximize efficiency in the call center and among sales staffs. Today, the platforms provide machine learning-based call handling analytics tools that assess location and/or rep performance, and provide scoring/grading systems, script optimization and real-time alerts that flag lost opportunities.

Data privacy compliance

Call data privacy continues to be a priority, particularly for businesses in the healthcare and financial services markets, which must comply with HIPAA and HITECH regulations. U.S.-based marketers with European prospects or customers are subject to the European Union's GDPR, and, in January 2020, the California Consumer Privacy Act (CCPA) went into effect. By November 2020, California residents approved an update to the law, the California Privacy Rights Act of 2020, which expanded consumer rights and imposed new data requirements on businesses. Many vendors automatically redact personally identifiable information (PII) and consumer financial information from call recordings and transcripts to conform to the PCI DSS.

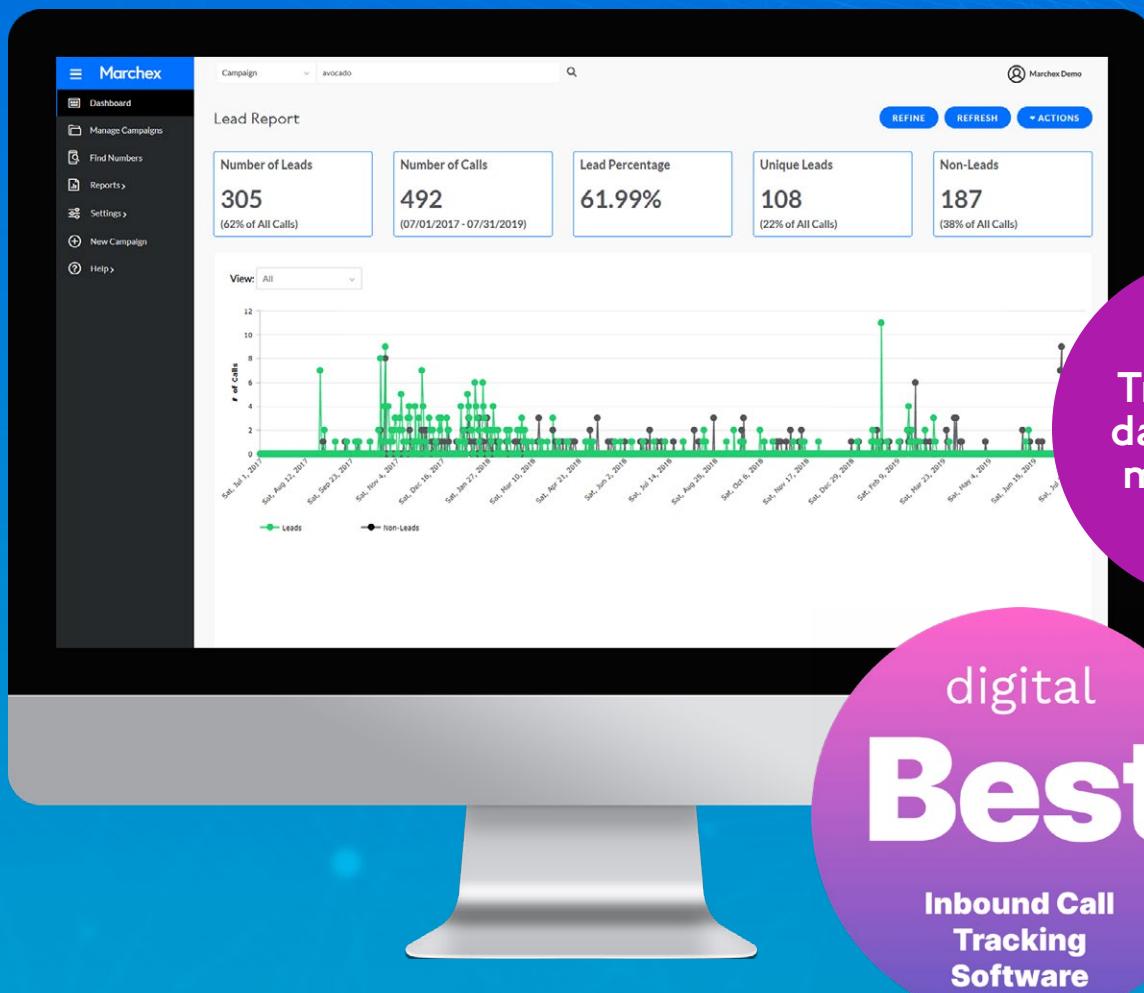
Martech ecosystem integration

Integrating call analytics data with martech and ad tech software systems has become essential to creating a unified view of callers, webpage and store visitors, prospects and customers. Call analytics vendors have expanded the number of built-in or native integrations available with SEO, PPC, DSP, CRM and marketing automation systems, as marketers try to create a more seamless customer experience across all touchpoints. In particular, calls play an important role in establishing the link between digital and offline channels. To that end, call analytics platform vendors continue to expand their connectivity with social media, Google and Bing, analytics tools, affiliate marketers and digital agencies. Most of the vendors profiled in this report also offer APIs to facilitate importing and exporting third-party data from external marketing and advertising systems. Access to these APIs may or may not be included in base pricing.



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Table 4: Selected call analytics platform capabilities

Vendor	Multichannel attribution	AI-based speech analytics	Intelligent call scoring/routing	Native social analytics integration	Sales rep coaching/evaluation	Data privacy compliance	Martech ecosystem integration	
							Native	API
AddSource	✓	✗	✓	✗	✗	GDPR	✗	✓
CallRail	✓	✓	✓	✓	✗	N/A	✓	✓
CallSource	✓	✗	✓	✗	✓	N/A	✓	✓
CallTrackingMetrics	✓	✓	✓	✓	✓	CCPA, GDPR, HIPAA, HITECH, PCI DSS, PIPEDA	✓	✓
Convirza	✓	✓	✓	✗	✓	HIPAA, PCI DSS	✓	✓
DialogTech	✓	✓	✓	✓	✓	CCPA, GDPR, HIPAA, HITECH, PCI DSS	✓	✓
Infinity	✓	✓	✓	✓	✓	CCPA, GDPR, HIPAA, PCI DSS	✓	✓
Invoca	✓	✓	✓	✓	✓	CCPA, GDPR, HIPAA, PCI DSS	✓	✓
iovox	✓	✓	✓	✓	✓	CCPA, GDPR, HIPAA	✓	✓
Marchex ¹	✓	✓	✓	✓	✓	CCPA, HIPAA	✓	✓
ResponseTap	✓	✓	✓	✓	✓	GDPR	✓	✗

¹Includes acquired brands Telmetrics and CallCap.

N/A=Not applicable

Regulatory abbreviations as follows: California Consumer Privacy Act=CCPA; General Data Protection Regulation=GDPR; Health Insurance Portability and Accountability Act=HIPAA; Health Information Technology for Economic and Clinical Health=HITECH; Payment Card Industry Data Security Standards=PCI DSS, Personal Information Protection and Electronic Documents Act=PIPEDA (Canada).

Source: Third Door Media

Choosing an enterprise call analytics platform

The benefits of using call analytics platforms

Call tracking and analytics play a vital role in bridging the gap between online and offline channels, leading to more efficient marketing resource allocation and improved sales staff effectiveness. The specific benefits of using an enterprise call analytics platform include – but are not limited to – the following:

- **Improved multichannel attribution.** By using DNI to track inbound calls to their source, call analytics establish the link between inbound calls and online search, display, social or email campaigns. The data can be fed into attribution models for greater accuracy.
- **More unified customer view.** Integrating call analytics data with CRM, marketing automation, tag management and other martech or ad tech systems provides the enterprise with a more complete view of each prospect and customer enabling more relevant, personalized marketing.
- **Optimized marketing campaigns.** Inbound calls can be tracked to their marketing source at the keyword, session, campaign or channel levels, and followed through the conversion funnel to identify the most profitable sources. Campaigns can then be optimized to focus on the messages and sources that attract the highest quality calls.
- **Smarter marketing resource allocation.** Understanding which ads, keywords and webpages drive the most profitable calls leads to more informed marketing and media spend decisions.
- **Increased sales staff productivity.** Tools such as IVR and intelligent call routing send high-value leads to the right agents or locations to close sales more efficiently. Call analytics can also reveal inefficiencies that, when improved, can boost key metrics such as lost opportunities.
- **Better sales performance.** Call analytics platforms record and analyze inbound calls to identify which agents and sales techniques close the most sales. Training can be provided to improve results, where necessary. Whisper messages help agents customize their approaches based on known customer information during calls.

Enterprise call analytics platform pricing

Licensing an enterprise call analytics platform can be a significant investment, particularly for multi-location and enterprise brands with thousands of locations and/or multichannel marketing strategies. The average annual cost for an enterprise customer among the vendors profiled in this report varies widely, from several hundred dollars to several hundred thousand dollars, depending on the volume of call numbers needed and the number of calls generated.

Not every enterprise call analytics vendor requires an annual contract. There may be pricing incentives for longer-term contracts, but several vendors allow customers to pay month-to-month. Virtually all enterprise call analytics platforms are licensed on a software-as-a-service (SaaS) basis, i.e., the vendor makes the software available online and is responsible for all maintenance and system administration. Pricing is largely based on usage – the number of call tracking numbers and call minutes used each month. Depending on the vendor, there may

Licensing an enterprise call analytics platform can be a significant investment, particularly for multi-location and enterprise brands with thousands of locations and/or multichannel marketing strategies.

also be fees for onboarding, custom integrations and training. Several call analytics vendors position their platforms as all-inclusive with few additional costs; other vendors present a la carte modular product suites.

Recommended steps to making an informed purchase

Understanding your current marketing processes, knowing how to measure success and being able to identify where you are looking for improvements are all critical pieces of the enterprise call analytics decision-making process. The following section outlines four steps to help your organization begin that process and choose the call analytics platform that is the right fit for your business needs and goals.

Step One: Do you need an enterprise call analytics platform?

Deciding whether or not your company needs an enterprise-level call analytics platform calls for the same evaluative steps involved in any software adoption, including a comprehensive self-assessment of your organization's business needs, staff capabilities, management support and financial resources. Use the following ten questions as a guideline to determine the answers.

Understanding your current marketing processes, knowing how to measure success and being able to identify where you are looking for improvements are all critical pieces of the enterprise call analytics decision-making process.

1. **Are we optimizing inbound phone calls as a sales or lead generating channel?** The phone continues to play an integral role in customer communications, particularly as more consumers work and shop from home. An Ipsos report commissioned by Google found that 70% of mobile searchers have used click-to-call capabilities to connect with a business.
2. **How much of our revenue (if any) do we attribute to inbound phone leads?** If the revenue you are already attributing to inbound calls is greater than the cost of the platform, then it makes sense to invest in one. For example, if you are in the automotive, financial services or telecom industries, your customers have a high propensity to use the phone to qualify "considered purchase" decisions.
3. **What is our process for analyzing inbound phone conversations? What kind of data can we pull out of calls?** Call analytics platforms use AI- and machine learning-based speech analytics and natural language processing to provide robust insights into call quality, particularly around caller sentiment, tone and intent.
4. **What call analytics capabilities does our organization need?** Prioritize the available call analytics features based on your most pressing business needs. For example, do you need to get started with basic call tracking data? Or send reports to clients (if you are an agency)? Are call conversions, missed opportunities or other in-call metrics most important? Or are pre-call tools, such as intelligent IVR and call routing more critical to your goals? The answers will help your organization choose a vendor that can help you meet your goals.
5. **Who will use the platform? At what level in the organization will it be managed?** C-suite buy in and appropriate staffing are crucial to the effectiveness of any call analytics platform. Increasingly, martech platforms such as call analytics are being managed by the CMO – and not the CTO or CIO. In either case, without the proper resources in place, the platform can end up becoming an expensive reservoir of untapped data with unfulfilled potential to increase revenue and improve your customer experiences.
6. **How much training will we need?** Different platform vendors provide different levels

of customer service – from self-serve to full-serve – and strategic consulting services. It's important to have an idea of where you fall on the spectrum before interviewing potential partners. Training is essential. If your organization chooses not to hire internal staff, then consider whether you need to use a certified platform partner to effectively use the system.

7. **Can we successfully integrate a call analytics system with our existing martech or ad tech systems?** Many enterprises work with different partners for email, e-commerce, CRM, social media, paid search, SEO and display advertising. Investigate which systems the call analytics vendor integrates with – whether natively or via API – and find out if they offer seamless reporting and/or execution capabilities with them.
8. **What are our reporting needs?** What information do your marketing managers, salespeople, customer support teams and IT departments require to improve decision making? You want to know the specific holes in your current reporting that will be filled by additional functionality and, more importantly, you want to be sure that that extra information derived from call analytics will drive better decisions.
9. **What is the total cost of ownership?** Enterprise call analytics platforms use on-demand pricing, meaning customers pay a monthly subscription fee that will vary by usage. The majority of vendors profiled in this report charge for both phone numbers and minutes. Some have platform and onboarding fees, and some do not. Examine your feature requirements closely, as modular pricing models mean vendors vary in their inclusion of some features as standard or add-ons.
10. **How will we define success? What KPIs do we want to measure and what decisions will we make based on call analytics data?** Set your business goals for the call analytics platform in advance to be able to benchmark success later on. Without them, justifying the expense of the platform or subsequent marketing campaigns to C-suite executives will be difficult.

Step Two: Identify and contact appropriate vendors

Once you have determined that a call analytics platform makes sense for your business, spend time researching individual vendors and their capabilities by doing the following:

- Make a list of all the call analytics capabilities you currently have, those that you would like to have and those that you can't live without. This last category is critical and will help you avoid making a costly mistake.
- Take your list of capabilities and then do some research. The "Resources" section at the back of this report includes a list of blogs, articles and industry research that will help. (Many of the vendors profiled in this report also provide whitepapers and interactive tools that can help.)
- Narrow your list down to those vendors that meet your criteria. Submit your list of the call analytics capabilities you've identified and set a timeframe for them to reply.
- Decide whether or not you need to engage in a formal RFI/RFP process. This is an individual preference, however, be sure to give the same list of capabilities to each vendor to facilitate comparison.

The most effective RFPs only request relevant information and provide ample information

about your brand and its call analytics needs. It should reflect high-level strategic goals and KPIs. For example, mention your company's most important KPIs and how you will evaluate the success of your call analytics efforts. Include details about timelines and the existing digital technology you have deployed.

When written properly, an RFP will facilitate the sales process and ensure that everyone involved on both sides comes to a shared understanding of the purpose, requirements, scope and structure of the intended purchase. From the RFP responses, you should be able to narrow your list down to three or four platforms that you'll want to demo.

Step Three: Scheduling the demo

Set up demos with your short list of call analytics vendors soon after receiving the RFP responses, to help make relevant comparisons. Make sure that all potential internal users are on the demo call and pay attention to the following:

- ✓ How easy is the platform to use?
- ✓ Does the vendor seem to understand our business and our marketing needs?
- ✓ Are they showing us our "must-have" features?

The questions to ask each vendor on the following topics include:

Phone numbers

- ✓ Do you offer both local and toll-free numbers? Do you have any international coverage?
- ✓ Can you support mobile callers by supplying local numbers or extensions that are dynamically generated based upon the site visitor's location?
- ✓ How do you clean your numbers? What is the number quarantine period you use before reissuing them?
- ✓ Are phone numbers portable? In other words, do we own the numbers and can take them with us if this engagement doesn't work out?

Onboarding

- ✓ What makes this platform technically unique from all the others?
- ✓ How difficult is platform set up and implementation? How long will it take for us to be up and running on the system?
- ✓ How intuitive is the platform user interface? How easy is it for business users to customize the machine learning-based models or settings?
- ✓ What is your service reliability guarantee? What telecom carriers do you work with?
- ✓ Do you manage proprietary telephony infrastructure or are you white labeled?
- ✓ How scalable is the platform? How many calls can it handle? How many calls have been successfully processed?

Call tracking

- ✓ Does the platform record calls? How long are call recordings available to us?
- ✓ Does the platform track data at both the session and keyword-level for search ads? Does it track data to the ad level for Facebook and display ads?
- ✓ How does the platform enable multichannel attribution?
- ✓ How does the platform measure and report call outcomes? Can we customize outcomes to our business needs?
- ✓ What type of call fraud detection and prevention tools do you have in place? Are they included in pricing? Or is there an additional spam-control fee?

When written properly, an RFP will facilitate the sales process and ensure that everyone involved on both sides comes to a shared understanding of the purpose, requirements, scope and structure of the intended purchase.

Speech analytics

- ✓ How does the platform use AI or machine learning algorithms to analyze the content of phone conversations?
- ✓ Does the platform utilize natural language processing or some other analytics tools?
- ✓ How does the platform's speech analytics help us score calls and feed the call data into our CRM, ESP or other martech systems?

Call data privacy

- ✓ Which data privacy regulations does the platform comply with? For example, does it meet HIPAA and CCPA requirements?
- ✓ Is PII automatically redacted from transcripts and recordings?
- ✓ Are you GDPR compliant for our European Union customers or calls?

Marketing automation and agent training

- ✓ Does the platform use machine learning-based call scoring and routing to automatically route inbound calls based on caller location, business hours and/or staffing?
- ✓ Does the platform feature whisper messages to announce caller sources or other valuable information to our agents before accepting the call?
- ✓ Can call scores be automatically fed into rep performance assessments?
- ✓ Does the platform enable other marketing automation capabilities, such as automatically generating online display or email nurturing campaigns?
- ✓ Do you offer native, off-the-shelf integrations with third-party systems such as search, web analytics, CRM or marketing automation platforms? If so, which ones?
- ✓ Are APIs available? Is access included in pricing?

Pricing and support

- ✓ What is pricing based on? What features are included? Are there additional fees (consulting, add-on features, APIs, quotas)?
- ✓ What is the minimum contract length? Is there a short-term contract or an 'out' clause if things don't work out?
- ✓ Is a free trial or pilot program available?
- ✓ Can the platform be white labeled for agencies or multi-location marketers?
- ✓ Who will be our day-to-day contact?
- ✓ Who pays if the system/team makes an error?
- ✓ What kind of customer support is available? Can I pick up the phone to report problems?

Strategy and product roadmap

- ✓ Do you have other clients in my vertical?
- ✓ How does the company handle requests for product modifications?
- ✓ What new features are you considering for the platform? What's the long-term roadmap and launch dates?

Step Four: Check references, negotiate a contract

Before deciding on a particular vendor, take the time to speak with several customer references, preferably individuals in a business similar to yours. The call analytics vendor should be able to supply you with several references if you cannot identify ones yourself. Use this opportunity to ask any additional questions, and to find out more about any questions that weren't answered during the demo. Make sure that the person you've been referred to is someone who is a primary user of the platform. Consider also asking these basic questions:

- ✓ Why did you decide to license a call analytics platform?
- ✓ Why did you select this platform over others?
- ✓ Has this platform lived up to your expectations?
- ✓ How long did the platform take to implement?
- ✓ Who was involved in the implementation?
- ✓ Are you also using additional tools for attribution, reporting or marketing automation?
- ✓ Were there any surprises that you wish you'd known about beforehand?
- ✓ Where have you seen the most success? The biggest challenges?
- ✓ How are you measuring your own success?
- ✓ Has the overall implementation provided positive ROI, including all costs (i.e., license, man-hours, etc.)?
- ✓ What is the most useful, actionable (favorite) report the platform generates?
- ✓ How easy was the setup process and how long? Did the vendor help?
- ✓ How responsive is customer service?
- ✓ Has there been any down time?
- ✓ What do you wish they did differently?
- ✓ Why would you recommend this platform?

Although not all vendors require an annual contract, many do. Once you've selected a vendor, be sure to get in writing a list of what technology and support are covered in the contract. Ask the following questions about what kinds of additional fees might come up:

- ✓ Are there charges for custom integrations or API access? If so, how much?
- ✓ What is the hourly charge for engineering services, and is there a minimum?
- ✓ What partner organizations are available to install and integrate the tool?
- ✓ If we need to train a new hire mid-year, what will that cost?
- ✓ What is the "out" clause?

Obtaining the answers to these types of questions up front – and having them in writing – will ensure fewer surprises or additional costs down the road.

Once you've selected a vendor, be sure to get in writing a list of what technology and support are covered in the contract.

In summary

The global pandemic has confirmed what many marketers already knew: the telephone is an integral part of the consumer purchase journey. Consumers crisscross multiple online and offline channels, often from the comfort of their own homes, to research products and services and make informed purchase decisions. The high-tech/high-touch telephone provides them with convenience, speed and personal contact that inspires brand trust.

More and more enterprise marketers are using call analytics platforms to collect, analyze and act upon the growing volume of caller data now being captured from the billions of inbound calls to businesses. The enterprise call analytics platforms profiled in this report provide a core set of competencies that automate and scale call tracking, recording, scoring, routing and fraud prevention.

Every enterprise is unique and at a different level of maturity in its web, social, mobile and multichannel marketing efforts. Marketers must carefully weigh current analytics needs against future goals when evaluating the return on call analytics investments. The market is developing rapidly, and many vendors are investing heavily in AI and machine learning to expand the range of marketing and sales use cases for their solutions. A careful and comprehensive internal evaluation of business goals and resources is the first step in the decision-making process. The result can be a long-term, productive call analytics partnership that boosts both revenue and profit for your marketing organization. ■

Vendor profiles

ADDSOURCE

AddSource

1050 SW 6th Ave.,
Suite 1100
Portland, OR 97204
T: 866-524-6699
www.addsource.com

Key customers

Dealership IDS Corp.
ER Rooter
Goteq
Home Advisor Inc.
Nonstop Locksmith
Solara

Key executives

David Dovman, CEO
Alex Babiak, CTO

Target customer

- SMBs, agencies, directory publishers and enterprises in a wide range of vertical markets.

Company overview

- Founded in 2012.
- 5 employees.
- Self-funded.
- GDPR compliant. Most call data stored with voice over IP (VOIP) provider Twilio, Inc.

Product overview

- Cloud-based call tracking platform that analyzes ad campaign results by linking inbound calls to specific ads, websites, mobile and offline campaigns.
 - Calls tracked by source and geography.
 - Call recording and call logs to evaluate rep performance.
 - Whisper messages provide reps with caller information immediately before a call.
- Dynamic click-to-call button for mobile websites.
 - Call Booster follows visitors as they browse the site.
- Dedicated agency platform utilizes a pay-per-call model to offer account-level management, call recording, cross-client reporting, custom call scoring and call statistics (i.e., valid, dropped or busy).
 - Advertising agencies can offer pay per call and join affiliate products to their clients under a white-label suite.
 - Affiliate commission calculation and dedicated affiliate account.
 - Pay-per-call billing system allows users to charge clients per-call cost and bill them automatically.
- Email tracking service instantly generates unique email addresses for any landing page or contact form.
 - Includes incoming email reports, mail routing, counting and validation, and multiple mail groups and destinations.
- SMS service allows users to send and receive SMS to the AddSource platform using the numbers under their account.

Primary use cases

- Marketing campaign optimization: Identify which media lead to inbound phone calls.
- Agency account management: Enable marketing agencies to present campaign results in a more efficient way, saving time on reports and communication.
- Pay-per-call ecosystem support: Provide advertisers with an ecosystem that can support pay per call with a UI, affiliate management and billing system.

In-call analytics

- Platform processes post-call data and shows it within the AddSource dashboard and report center.
- Automatically qualifies calls and marks them with status, i.e., valid, repeat, short, drop, no answer; and generates detailed reports about incoming calls.
- Custom auto-validation rules based on call duration.
- Identifies repeat calls.

Vendor profiles

oADD SOURCE

AddSource

1050 SW 6th Ave.,
Suite 1100
Portland, OR 97204
T: 866-524-6699
www.addsource.com

Social media/messaging

- Users can track calls from social media by placing call-tracking numbers behind click-to-call buttons.
- Standalone messaging solution enables users to send and track SMS messages (maximum 160 characters) using number assigned to their account.

Marketing automation

- Enables marketing agencies to identify valid, billable calls driven by their marketing efforts, according to pre-set terms (e.g. no repeat calls, minimum duration 30 seconds).

Reporting

- Real-time Smart Call reports track and measure call volume and ad campaign effectiveness.
- Reports exported as PDF, Excel or CSV files.

Martech ecosystem integration

- Merchant service integration available.
- Works on the Google API.

Pricing and support

- Pay-as-you-go pricing based on volume of phone numbers and minutes (volume discounts available).
 - Ranges from \$3/month for up to 10 numbers to \$1.50/month for 21-50 numbers.
 - Additional charge of 6 cents/minute.
- Free 30-day trial available.
- No annual contract required.
- Included standard support during normal business hours (9am-5pm EST weekdays).
- 24/7 online chat and email support.

Vendor profiles



CallRail

100 Peachtree Street,
Suite 2700
Atlanta, GA 30303
T: 888-771-3005
www.callrail.com

Key customers

American Addiction Centers
Logical Position
Molina Healthcare
RealPage ILM
XPlorner Communications

Key executives

Andy Powell,
Co-founder and CEO
Kevin Mann,
Co-founder and CPO
Elliott Wood, CTO
Mary Pat Donnellon, CRO

Target customer

- Small to mid-size businesses that rely on quality inbound leads and the marketing agencies that serve them.

Company overview

- Founded in 2011.
- 197 employees.
- Raised \$132M in venture funding, including \$56M in December 2020.
- Privacy and security controls meet requirements for HIPAA and GDPR.

Product overview

- Marketing and analytics platform comprised of Call Tracking, Form Tracking, Conversation Intelligence, and Lead Management modules and communications software to help businesses analyze marketing performance so they can optimize campaigns and maximize budget.
- Provides insight into which channels, campaigns, keywords and ads are generating phone calls and form submissions.
- Simplifies marketing reporting by tracking all lead generation in one platform.
- Manages all customer communications from a single unified inbox, regardless of the channel – including calls, texts and live chats.
- Drives sales efficiency with a consolidated database and automated lead management tools.
- Powers relevant and effective conversations with visibility into every historical customer interaction, including the marketing source and call history.
- Maximizes team productivity with agent reporting, monitoring and coaching tools.
- Integrates with major marketing and sales platforms including HubSpot, Facebook, Salesforce, Google Ads and Google Analytics.

Primary use cases

- Determine marketing ROI: Call and form tracking enable users to track campaign performance and gain insight into best-performing campaigns to tweak marketing strategy for increased ROI.
- Lead analysis: Conversation Intelligence automatically qualifies phone leads by transcribing and reviewing inbound calls. Instantly categorize and score calls, plus identify keywords that are meaningful to the business.
- Lead management: Lead Center helps small businesses seamlessly engage with leads through easy-to-use communication tools and workflows. Automatically track contact details and conversation history in one place.

In-call analytics

- Call transcriptions: Automatically transcribes telephone conversations in real time.
- Call highlights: Automatically surfaces conversation trends that marketers define, including keywords, phrases and common questions.
- Call tags: Sorts and categorizes calls and form submissions. Each company has its own set of tags that can be created, edited and color-coded to sort data faster.
- Caller ID: Companies with multiple tracking numbers may prefer to see a specific tracking number on their caller ID to know when a call is coming in through a tracking number.

Vendor profiles



CallRail
100 Peachtree Street,
Suite 2700
Atlanta, GA 30303
T: 888-771-3005
www.callrail.com

Social media/messaging

- SMS messaging capabilities to send and receive text messages using tracking phone numbers through the CallRail dashboard.
- SMS analytics dashboard reports on click volume generated by click-to-text ads.
- Form Tracking tracks online form submissions from online sources, including websites, social media and display ads.
- Native integration with Facebook to discover which campaigns and ads drive phone calls, text messages and form fills in real time.
 - Brings phone call conversions into Business Ad Manager through Facebook's offline conversion API.

Marketing automation

- Call flow builder provides call routing through menus, schedules, round robin and custom routing rules, including geo-routing that automatically routes callers to the closest business location.
- Automated call scoring built on CallRail's conversation analytics technology provides the ability to choose criteria and keywords by industry and instantly mark calls as leads upon call completion.
- Integration triggers enable users to decide which data to send to third-party software systems.

Reporting

- Multi-touch, cost-per-lead report ties inbound call, text and form data to ad spend data from Bing Ads, Facebook and Google Ads, with ad cost data from each platform.
- Measures call conversions from digital and offline marketing campaigns including (but not limited to) PPC keywords; Facebook social tracking; Google, Yahoo! and Bing paid and organic search; online directories and web referrals; print ads and Yellow Pages; direct mail; billboards; and

broadcast ads.

- Both keyword and source tracking capabilities.
- Lead classification and lead funnel reporting provide a breakdown of callers marked as good leads, visually illustrating lead flow.
- Granular reporting with all filters dropdown menu to apply multiple filters to activity dashboard and reports.
- Printable and PDF report functionality.
- White-label and co-branded reports available.

Martech ecosystem integration

- Native integration with Google Analytics and Ads; Optimizely (analytics); VWO and Unbounce (conversion optimization); HubSpot and Marketo (marketing automation); FullStory (user experience); Slack (collaboration); Salesforce and PipelineDeals (CRM); Acquisio, Marin and Kenshoo (PPC bid management); and Facebook and Bing Ads (digital advertising).
- WordPress plugin for easier dynamic number insertion (DNI).
- More than 300 integrations available via Zapier.
- API for additional system connections to call tracking phone numbers.

Pricing and support

- Pricing for various modules as follows:
 - Call Tracking: \$45/month.
 - Lead Center: \$30/month.
 - Conversation Intelligence: \$50/month.
 - Form Tracking: \$50/month.
- All modules subject to minute overage charges.
- Lead Center, Conversation Intelligence, and Form Tracking require a Call Tracking plan.
- No setup fees.
- Free trials available.
- No annual contract required.
- Included customer support operates during business hours (9am-6pm ET).

Vendor profiles

CallSource®

CallSource

5601 Lindero Canyon Road,
Suite 200
Westlake Village, CA 91362
T: 877-225-5768
www.callsource.com

Key customers

Champion Windows
Chrysler
Cox (DealerTrack)
Sonic Automotive Group

Key executives

Elliot Leiboff, CEO
Indra Chitre, President & CFO
Jason Scinocca, CTO

Target customer

- SMBs, enterprise brands, original equipment manufacturers (OEMs) and multi-location marketers in the media and publishing, automotive, financial services, home improvement, healthcare and franchise industries.

Company overview

- Founded in 1991.
- 100+ employees.
- Integrates with most major phone systems to analyze calls.

Product overview

- Call tracking for offline attribution solution that has evolved to include advanced digital marketing, and call coaching and performance.
- Offers a variety of services to maximize advertising ROI and call handler performance.
- Solutions include call tracking, lead categorization/parsing and alerts for missed opportunities and review responses.
- Solutions are designed to maximize call-to-appointment rates by helping employees improve phone-handling skills. Key metrics include cost-per-lead by ad source, as well as lead conversion rate by employee.
 - *CallTrack®* captures and identifies call numbers, locations and sources; records calls for review.
 - ◆ Local, toll-free and vanity numbers available.
 - ◆ Dynamic number insertion (DNI) available and can track up to 5 dynamic phone numbers on a single webpage.
- *Deal Saver* delivers alerts to owners if an appointment opportunity was missed. It provides the caller's essential contact data, call handler information, an audio file of the call and notes what department the alert came from.
- *Telephone Performance Analysis® (TPA)* is an employee evaluation tool that analyzes agent sales/customer service skills by reviewing and grading sales calls based on specific criteria.
- *Call Coaching* uses recorded calls scored against CallSource's proprietary principles to build call handlers' skills and increase call-to-appointment rates.
- *EveryLead®* combines offline and online attribution in a real-time dashboard.
- *CS Reviews & RespondNow* uses real people to aggregate and respond to online reviews for business owners to protect brand reputation using a customized criteria.
- *CallShield* is a cloud-based fraud detection and prevention service that blocks telephone hacking and computer-generated robo calls.

Primary use cases

- Call management: Offline marketing attribution and missed opportunity alerts.
- Performance management: Employee phone skills evaluation and call coaching.
- Digital management: Patented technology for online attribution cross-domain, channel and devices, using DNI.
- Review management: Online reputation protection, review aggregation and review response service.

Vendor profiles

CallSource®

CallSource
5601 Lindero Canyon Road,
Suite 200
Westlake Village, CA 91362
T: 877-225-5768
www.callsource.com

In-call analytics

- *CallProcessing®* parses calls by department and analyzes lead quality as well as call handler performance, closing ratios and business performance benchmarked against the industry.
- Uses trained, industry specialized human analysts to listen to and score calls.

Social media/messaging

- Text-enabled (SMS) numbers available for all call tracking lines. Users can respond to conversations inside the CallSource dashboard.
- Form submission and chats are viewable and actionable inside the *EveryLead* tool.
- Tracks more than one text-enabled line on a page.
- Tracks digital attribution down to the keyword level.

Marketing automation

- *LeadScore®* reviews, sorts and filters out non-prospects from tracked calls.
 - Leads forwarded to CRM or lead management tools for improved cost-per-lead analysis and sales conversion percentages.
- *Appointment Confirmation* records and analyzes all inbound prospect calls to determine call outcomes, documenting which calls resulted in appointments versus calls that missed the opportunity to book an appointment.

Reporting

- Call conversions, call handler performance, missed opportunities alerts, call recordings and marketing attribution from all ad sources are accessible in one centralized dashboard.
 - Actionable items are highlighted for quick reference.
- Customizable reports are created with dropdown menus and granular data.

- White-labeled or personalized reports are available to create, manage or download.
- Monthly owner summary reports are sent to user inboxes to compare the business to the industry.
- *LeadScore®* reports include number of actual leads per source and average agent time spent on sales calls.
- *DealSaver®* email alerts and mobile app review inbound calls and send real-time alerts to users' mobile devices when lost leads or missed opportunities are identified.
- Alerts deliver contact information and call recordings.
- *EveryLead* uses patented DigitalAI technology to individually map visitor paths across websites and through sessions, whether on a desktop or mobile device, to understand online activity and purchasing intent. Reporting includes call details, prospect activity and traffic analysis.

Martech ecosystem integration

- API for integration with CRM and marketing automation systems.
 - Native CRM integrations with ELEAD1ONE (automotive), and MarketSharp and ServiceLine (home services).

Pricing and support

- Pricing ranges from \$399-\$1,299/ month and is based on the volume of phone numbers and minutes.
- SaaS-based pricing available.
- White-label integrations available.
- One-time setup fees range from \$99-\$349.
- Free trials are available.
- Annual contract not required (discount is available for those who sign one).
- Customer support and industry specialized dedicated Account Managers and business advisers available.
- 24/7 after-hours support available.

Vendor profiles



CallTrackingMetrics

CallTrackingMetrics

877 Baltimore Annapolis Blvd.,
Suite 100
Severna Park, MD 21146
T: 800-577-1872
www.calltrackingmetrics.com

Key customers

Crystal Cruises
Pulte Homes
SearchKings
ServiceMaster
The Goddard School

Key executives

Todd Fisher,
CEO and Co-founder
Laure Fisher,
COO and Co-founder

Target customer

- Mid-market B2B and B2C brands, plus agencies, consultancies and performance marketers (lead resellers) serving industries relying on critical communication channels such as addiction treatment, law, healthcare, home services, multi-location franchises and enterprise-level call centers.

Company overview

- Founded in 2008.
- 55 employees.
- Privately funded.
- CCPA, GDPR, HIPAA, HITECH, GDPR, PCI DSS and PIPEDA compliant.

Product overview

- An all-in-one call tracking platform that combines conversation intelligence with contact center functionality to drive more informed marketing decisions and facilitate smarter customer acquisition and communication across sales, marketing and customer service teams.
- Conditionally directs calls, texts, chats and online forms based on actions visitors have taken on brand website, conversation history, location, custom criteria and more.
- Defines rules and milestones with an auto dialer to strategically manage calls in line with team availability and caller behavior.
- Call tracking features include:
 - Reliable dynamic number insertion (DNI) for session-level attribution.
 - Local, toll-free and vanity tracking numbers for online and offline tracking.
 - Omni-channel attribution across calls, texts, form fills and chats.
 - Conversation intelligence tools like live listen, transcriptions, call recording and keyword spotting.
 - Real-time activity stream to view all conversations as they happen.
 - Standard and custom reporting dashboards to track activity volume.
- Contact center features include:
 - Browser-based softphone to facilitate the communication of in-office or remote workforces.
 - Bulk SMS messaging and auto dialer features.
 - Advanced call routing options and smart routing from customizable IVRs to geo-routing.
 - Intuitive team and role structures to power agent queues, schedules and real-time agent reporting.
 - Customer service tools to meet users where they are, while remaining in one platform to answer calls, texts and chats.
 - Whisper messages, automated tagging, wrap up panels and call scoring for efficient communication and follow up.

Vendor profiles



CallTrackingMetrics

CallTrackingMetrics
 877 Baltimore Annapolis Blvd.,
 Suite 100
 Severna Park, MD 21146
 T: 800-577-1872
www.calltrackingmetrics.com

Primary use cases

- Measuring and proving marketing performance: Capture every conversion, online and offline, to provide clients and internal stakeholders with accurate and actionable insights.
- Conversion and campaign optimization: Use robust conversation intelligence and reporting features to provide data needed to impact revenue decisions and automated optimization through integrations with ad platforms.
- Performance marketing and lead reselling: Combine inbound call analytics with automated and smart routing to measure results accurately and deliver outcomes quickly.
- Contact center efficiency: Customizable IVRs, schedules, and smart routing options enable conversations to be routed to the right person or team, creating better customer experiences.
- Sales, support and marketing alignment: Optimize marketing campaigns, score sales leads, and route returning callers to customer service with transparency.
- Outbound campaigns: Use bulk SMS campaigns, short codes and a customizable auto dialer to reach prospects and customers at scale.

In-call analytics

- Real-time activity stream logs all conversations in one place providing receiving agents, contact center managers and marketers with instant intelligence.
- Live transcriptions and call recordings drive automated tagging and insights for conversation follow up, reporting and analysis.
- Call whispers can provide either the receiving agent or caller with context before a call begins to set expectations and provide the best customer experience.
- Editable contact panels and custom

fields can be manually or automatically set during a call to save agents time and provide context to push into an integrated martech stack.

- Spam detection will flag calls unlikely to be productive, allowing sales and customer service teams to spend their time on more valuable interactions.

Social media/messaging

- Integrates directly with Facebook, Instagram and Snapchat.
- With live chat, agents can receive and respond to Facebook Messenger chats in real-time within the platform.
- Uses DNI and offline tracking numbers to attribute and report on conversations from any social media profiles and posts.
- Full suite of SMS text messaging features to attribute sources, send automatic replies and streamline customer service with text-to-chat functionality.

Marketing automation

- FormReactor allows marketers to track and attribute form fills and automate follow up by triggering actions such as an immediate agent call back.
- Tracks and automates responses from bulk SMS text message campaigns.
- Sends valuable conversions directly to advertisers like Google Ads and Facebook to power smart bidding and custom audiences.
- Automated lead scoring to rate conversations on custom attributes.
- Contact list features to automate high-volume outbound campaigns and integrate with Mailchimp.

Reporting

- Conversations matched to website visitors and tracking sources in a real-time activity stream with contextual tagging, summaries and custom contact fields.
- Key metrics for call center performance

Vendor profiles



CallTrackingMetrics

CallTrackingMetrics
 877 Baltimore Annapolis Blvd.,
 Suite 100
 Severna Park, MD 21146
 T: 800-577-1872
www.calltrackingmetrics.com

- available at the individual or team level.
- Live dashboards to track activity throughout the day to manage and optimize team productivity and resourcing.
- Detailed activity reports to the keyword level to see which advertising sources drive the most conversions, the highest lead quality, or the highest return on investment.
- Google Data Studio connector enables users to combine CallTrackingMetrics data with existing tools to report on key performance metrics and visualize conversation activity next to Google Analytics data.

Martech ecosystem integration

- 40+ integration partners, an open API (including webhook support and custom Lambda functions) and developer office hours.
- Native integrations with Bizable, Drift, Facebook and Facebook Messenger, Gong, Google Analytics, Google Ads, Google Data Studio, HubSpot, Salesforce, Mailchimp, Microsoft Ads, Microsoft Dynamics 365, Marketo, Shopify, Slack, Snapchat, Unbounce, WordPress, Zendesk and Zoho.
 - Further integration automation available through Zapier.

Pricing and support

- Subscription-based model, with usage costs based on volume of conversations

and features used.

- Business plan: \$39/month.
- Marketing plan: \$99/month.
- Contact Center plan: \$299/month.
- Custom pricing available for enterprises.
- White-label and reseller tools available with mark-up pricing.
- Free trials available.
- No annual contracts required; discounts available for annual commitments.
- Extended live support (M-Th: 7:30am-7:30pm EST; Fr: 7:30am-5:30pm EST) included on all plans with access through email, phone and chat.
- 24/7 access to an online knowledge base, recorded training videos and product guides.
- Standard onboarding includes access to live weekly webinars, calls with a dedicated team member and free academy training classes.
 - Add-on premium support offers dedicated engineer resources and response-time guarantees.
- API support resources include weekly webinar, Q&A sessions and technical documentation for developers.
- Fee-based professional services to help customers with migration, implementation and complex configurations.

Vendor profiles



Convirza

138 East 12300 South,
Suite C
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www.convirza.com

Key customers

Belle Tire
BrandMuscle
Caterpillar
Gannett

Key executives

Jeremiah Wilson,
CEO & Founder
Jason Wells, President &
Chief Product Officer
Kristine Champion, CMO

Target customer

- SMBs to enterprise digital agencies and businesses in the retail, automotive, healthcare, home improvement, travel and hospitality, financial services and real estate industries.

Company overview

- Founded as LogMyCalls in 2001, rebranded as Convirza in May 2015.
- 78 employees.
- Raised a total of \$29M in venture financing.
- Redaction Pro for PCI DSS compliance and *Caller Privacy* for HIPAA compliance.

Product overview

- Call tracking, recording, analytics and marketing optimization platform providing pre-call, on-call and post-call data via digital tracking.
- *Conversation Analytics®* for tracking conversions, lead score, promotion mention, sales inquiry, initial purchase, appointment set, missed opportunity, politeness, phone etiquette and more.
- SMS tracking numbers enable text with historical archives.
- Intelligent transcription with keyword search and tagging.
- Extensive inventory of 800, vanity, toll-free and local numbers.
- Tracks and analyzes online, offline and mobile sources.
- Out-of-the-box and extendible marketing, sales and customer service signals and artificial intelligence (AI) indicators.
- Advanced session and visitor-level dynamic number insertion (DNI) attributes calls to individual web sessions, web visitors, online sources, media, campaigns, ads, keywords and webpages.
- Redaction automatically erases sensitive personally identifiable information (PII) and financial data from call recordings.
- Whisper announcements provide pre-recorded messages to agents.
- Workflow management tools create custom roles and platform access.
- Advanced telephony system includes geo-routing, custom greetings, voicemail, multi-level customizable interactive voice response (IVR), call scheduling, automatic rollover, hunt groups, call routing options and outbound call recordings.
- Spam Guard add-on feature provides automated, adaptive and predictive spam protection in real-time for inbound phone calls.

Primary use cases

- Track, analyze and optimize calls: Determine which marketing channels are most effective to better allocate budget spend. Improve understanding of multi-step customer journeys. Match campaigns with tracking numbers, including local, true 800, toll-free and vanity numbers.
- Detect conversions: Use AI-driven *Conversation Analytics®* technology to identify lead quality, score sales skills to identify strengths, pinpoint areas for improvement and monitor agent performance with *Instant Insight*. Detect whether calls convert by phone number, campaign or channel, and offer near real-time call analytics results.
- Automate post-call responses: Call actions provide text and email missed opportunity alerts for conversion recovery. Systematized actions for fast growth and client value, and faster call analysis with scheduled reports.

Vendor profiles



Convirza

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In-call analytics

- Conversation Analytics® combines AI and natural language speech recognition technology to analyze phone calls.
 - Uses more than 2 million proprietary algorithms to evaluate phrases, word frequency, caller sentiment, tone and other signals.
 - Automatically determines call outcomes as well as sales readiness, price sensitivity and conversions using industry-specific machine learning.
 - Call language library with standard signals/indicators and customizable indicators for client use cases enabling sophisticated call tracking and analysis.
- Real-time call data to recover sales and marketing leads, shorten sales cycles and reduce lead costs.

Social media/messaging

- Tracks all calls originating from social media.

Marketing automation

- Provides lead scores for every call to gauge lead quality and agent performance.
- Automated near real-time missed opportunity and lead SMS texts or emails enable immediate follow-up for mobile and non-mobile sales teams.
- Call data automatically sent to any third-party SaaS solution.
- Email and text alerts when call analytics detect strong leads but no conversion for missed opportunity recovery.
- Calls automatically routed to nurturing campaigns via CRM or email based on lead quality.
- Automated bid management capabilities to improve bidding

structure and optimize ROI.

Reporting

- Visibility into campaign performance through marketing dashboard, analytics summary report and trend analysis.
- Customizable KPIs include campaign ROI, sales performance and call revenue goals.
 - Identifies high-performing keywords and ads.
 - Closed-loop attribution combines online and offline customer journeys.
- 50+ in-call metrics to measure online and offline customer interactions.
- Zip-code maps for calls to pinpoint top markets and campaigns with color-coded heat maps.
- Automated call back reports for missed opportunities follow-up.
- Customer scorecards for evaluating agents, locations and regions.
- Reports can be scheduled for daily, weekly and monthly distribution.
- Report data accessible via SMS and email without logging into the system.
- Flexible user permissions for accounts, users and groups.

Martech ecosystem integration

- Native integration with Google Analytics, Google Data Studio, Acquisio and DoubleClick.
- Webhooks and REST-based APIs for integration with CRM (Salesforce), marketing automation (Act-On, HubSpot, Marketo, Oracle Eloqua), web analytics (Adobe Analytics), bid management (Marin, Adobe Media Optimizer, IgnitionOne, Kenshoo) and learning management (WordPress) systems.

Vendor profiles

**Convirza**

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Pricing and support

- SaaS-based pricing plans include Starter (\$29/month), Professional (\$199/month and up) and Advanced custom packages for agencies and enterprises.
- Pricing includes onboarding, phone and email support, and a personal Account Manager.
- Custom-priced plan offers upgrades such as app customization, white

labeling and advanced telephony.

- 21-day free trial.
- No annual contract required.
- White-label solution for customized agency call tracking and analytics experiences.
- Online knowledge base includes videos, training, product guides and feature tips.

Vendor profiles



DialogTech
 120 S Riverside Plaza
 Chicago, IL 60606
 T: 877-295-5100
www.dialogtech.com

Key customers

ATI Physical Therapy
 Brookdale Senior Living
 Comfort Keepers
 GE Appliances
 Sylvan Learning
 Terminix

Key executives

Doug Kofoid, CEO
 Jay Sinder, CFO
 Chris Henger,
 Chief Product Officer
 Leon Chism, CTO

Target customer

- Marketers, sales operations teams, franchisee owners and call center managers at enterprises, multi-location brands and franchises in call-dependent industries, including healthcare, financial services, insurance, automotive sales and repair, home services, travel and hospitality, retail and e-commerce.
- Digital agencies partnering with these businesses.

Company overview

- Founded in January 2005 as Ifbyphone. Rebranded as DialogTech in March 2015, after acquiring Mongoose Metrics.
- 150+ employees.
- \$60M in total venture funding.
- Over 3,000 customers in 40-plus industries.
- Additional offices in Cleveland, OH, and the Netherlands.
- HIPAA, HITECH, CCPA, GDPR and PCI DSS compliant.

Product overview

- Conversation intelligence solution that turns inbound phone calls into first-party data to fuel marketing, sales and CX performance and revenue.
- Combines call tracking, artificial intelligence-driven conversation analytics, martech integrations and intelligent call routing technology to help businesses understand their customers through four integrated products:
 - *SourceIQ*: Provides actionable, spam-free call tracking and attribution data to measure how digital channels, ads, call extensions, search keywords, website interactions, offline marketing and other sources drive phone calls.
 - ◆ Dynamic Number Insertion (DNI) technology includes tracking for multi-location businesses; support for local, toll-free and international numbers; and algorithms for keyword- and session-level call attribution.
 - *DialogAnalytics*: Records and transcribes phone conversations, storing them in a searchable database. Artificial intelligence (AI) and machine learning algorithms analyze, score and categorize conversations, determining if the call was answered, if it was a sales or support call, the lead score, product/service interest, conversion outcome and more.
 - *IntegrationStudio*: Activates intelligence from phone conversations across the tech stack, including digital ad platforms, bid management tools, web analytics solutions and CRM to fuel better decision-making and results.
 - *ExperienceHub*: Enables marketers to control and personalize the caller experience by creating data-driven call routing rules and interactive voice response (IVR) prompts to assist, qualify and route each caller to the agent or location best able to convert them.

Primary use cases

- Online-to-offline attribution: Measure how search and digital channels, ads, keywords, webpages, GMB listings and social properties drive calls that convert to customers.
- Marketing optimization: Use intelligence on what marketing sources drive the most valuable phone calls to optimize ad spend, keyword bidding, messaging and other strategies to drive more revenue-generating calls and eliminate wasted ad spend.

Vendor profiles



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www.dialogtech.com

- Revenue matchback: Connect callers from each marketing source to downstream revenue in CRMs or other systems to measure marketing ROI and fuel smarter optimizations.
- Consumer intelligence: Unlock intelligence from phone conversations at scale to understand consumer preferences, shifts in behavior by geography, marketing performance, sales operations and CX gaps.
- Audience segmentation: Segment callers into the right audiences for retargeting, look-alikes and suppression based on insights from phone conversations.
- SEO optimization: Analyze call recordings and transcriptions to understand why consumers call and the questions they have about products/services and answer them on relevant webpages to attract and convert more website visitors.
- Frictionless call experiences: Automatically route each caller to the best location or agent to convert them based on their real-time data.
- Call handling performance analytics: Detect issues with unanswered or unconverted calls at locations and call centers, diagnose the cause and take corrective action to increase call channel conversion rates.
- Sales coaching and development: Provide locations and agents with recordings/transcriptions of phone leads that did or didn't convert to use as coaching tools to improve performance.

In-call analytics

- Delivers intelligence on the caller and what marketing interaction drove their call to locations or call center agents in real time.
 - Activates data across the martech stack to accurately measure marketing performance, inform audience segmentation and fuel smarter optimizations.
- Business-specific AI and machine learning algorithms analyze

conversations at scale to score them for marketing, sales and CX insights, including caller intent, lead quality, product/service interest, conversion outcome and CX issues.

- Provides call handling analytics on how each location or agent answers and converts calls to detect and correct call experience issues impacting sales.
- All call recordings and transcriptions stored in a searchable database to understand when and why consumers call, identify consumer behavior shifts by geography, and diagnose call handling and CX issues.

Social media/messaging

- Attributes calls and analyzes conversations driven by social media ads, organic posts and business pages.
- AI detects lead quality, product/service interest and conversion outcomes of every call and segments callers into audiences for retargeting and look-alikes across Facebook, Instagram and other social platforms.
- Conversation intelligence from calls can be activated within Facebook Ads Manager to view and optimize ad performance.

Marketing automation

- Keyword-level conversation intelligence activated across Google Ads, Microsoft Advertising and bid management tools to automate better bid optimizations.
- Automatically segments callers into audiences based on phone conversations to improve results from retargeting and look-alike campaigns.
- Automated email alerts notify locations and franchisees when good callers don't convert, calls at locations go unanswered and CX issues occur.

Reporting

- Real-time, customizable reports and dashboards visualize how well marketing channels, keywords, webpages and other sources drive

Vendor profiles



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quality sales calls to each location, if those calls are answered and converted by each location, trends in call volume and quality, and when and where CX issues occur.

- Reports can be scheduled for automatic delivery to team members, locations, franchisees or agency clients.
- Email alerts notify marketers, location managers and franchise owners of location-specific call issues, including hot phone leads that don't convert, unanswered calls and CX issues.
- Google Analytics, Google Ads, Microsoft Advertising, Facebook, LinkedIn and Twitter data can be exported into DialogTech and visualized in custom dashboards along with call data.
- Users can run automated searches through call recordings and transcriptions to get deep insights from the voice of the customer.

Martech ecosystem integration

- *IntegrationStudio* activates actionable data on call volume and value across martech stack platforms to improve performance.
- Native integration with ad platforms (Google Ads, Microsoft Advertising, Facebook), website analytics (Google Analytics, Adobe Analytics, CAKE), DMPs (Adobe Audience Manager, Google Marketing Platform, The Trade Desk), bid management (Google Search Ads 360, Marin, Kenshoo,

Acquisio, Adobe Advertising Cloud), CRMs (Salesforce, Microsoft Dynamics 365, HubSpot), contact center management (Genesys, Amazon Connect), website optimization (Adobe Target, Optimizely, Instapage) and dashboard tools (Swydo, TapClicks).

- Additional integrations with Yext and LiveRamp.
- APIs available for custom integrations.

Pricing and support

- SaaS-based pricing for enterprises starts at \$1,000/month and is based upon customer need and call volume.
- Free trials not available, but pilot programs are offered.
- Customer Success team offers onboarding and support; seamless data retrieval and implementation; liaison with third-party integration partners or agencies, as requested; and regularly scheduled evaluations to measure business results and strategic goals.
- Troubleshooting and technical support during business hours.
- Fee-based professional services include:
 - Accessible AI: Turnkey analytics and client setup designed to fine tune AI platform to unique business terms and outcomes.
 - Managed services: Dedicated resources to execute, deliver and maintain conversation insights.

Vendor profiles



Infinity

The Shard, 28th floor
32 London Bridge St.
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Key customers

Dell
Direct Energy
Laureate
Mazda
TripAdvisor
TruGreen

Key executives

Stuart Dawson, Chairman
Warren Newbert, CEO
Maria Psaltaki, Chief Product Officer
Matthew Whiteway, Chief Commercial Officer

Target customer

- Brands in the automotive, financial services, leisure, healthcare, education, professional services, technology, communications, utilities and real estate markets, as well as agencies that serve them.

Company overview

- Founded in 2010.
- 100 employees.
- Global services available in 75-plus countries worldwide.
- Additional U.S. office in San Francisco; international offices in Madrid and Reigate, Surrey and Manchester in the U.K.
- GDPR and HIPAA compliant.

Product overview

- Full visitor journey attribution, call recording and visitor-level call tracking for granular visibility on marketing ROI when a phone call is a touchpoint.
- Provides call handlers with real-time caller insights, including digital journey tracking and PPC keywords.
- Call transcription for data analysis for better customer interaction and benefits around call handler development, marketing insight and revenue tracking.
- Fully encrypted session initiation protocol (SIP) calls for inbound and outbound calls across multiple major markets.

Primary use cases

- Enterprise use cases in marketing, operations and sales.
 - Optimize marketing spend: Reduce cost per acquisition and identify revenue generating opportunities.
 - Improve customer experience: Improve the understanding of user journeys to lead to more valuable calls and conversions.
 - Unlock conversation insights: Segment calls based on outcome, enhance competitor intelligence and improve market awareness.

In-call analytics

- Uses both machine learning and manual analysis to transcribe, analyze and score calls. Machine-based call routing enables call logs to be stamped with call route and automatically rates call value based on custom parameters (such as call length, outcome or keywords used).
- Payment identification to highlight calls where bookings or payments were made, while redacting sensitive data.
- Predictive insights use deep learning technology to understand intention from spoken information. Enables call classification as either positive or negative.
- End-of-call rating allows agents to use customizable phone keypad selections to rate the value of each call.

Vendor profiles



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Social media/messaging

- Integrates with Facebook and Instagram to track specific social activity that led to a call.
- Enables marketers to build look-alike audiences in Facebook and Instagram for paid campaigns based on likelihood that they will call the business.
- Tracks inbound calls, revenue goals, keywords mentioned and call outcomes by social media source.

Marketing automation

- *Infinity Caller Insight for Salesforce* passes call data directly and automatically into Salesforce, enabling reps to customize conversations with new customers based on real-time customer search term, page called from and key indicator page data.
 - Identifies upsell/cross-sell opportunities by identifying keywords used.
 - Connects call outcomes to customer journeys.
- Keyword spotting in the *Conversation Analytics* suite enables businesses to automatically pinpoint, rate and group calls using certain terms or words that matter to them.

Reporting

- *Infinity Hub* contains a comprehensive, interactive library of calls to surface insights.
 - View call and marketing data by pivoting data from the first touchpoint with a business.
 - Users can see what led to specific conversions across a wide mix of channels.
- *Infinity Caller Insight for Salesforce* enables reporting in Salesforce by using a range of new call metrics cross referenced against existing Salesforce metrics.
- Users can schedule customized reports to be emailed to interested parties at chosen intervals.

Martech ecosystem integration

- Native integration with 45 martech systems including web analytics (Google Analytics, Adobe Analytics, Webtrends), bid management (Google DS3, AdWords, Bing, Marin, Kenshoo), display (Quantcast, Flashtalking, Google DCM), conversion optimization (Qubit, VWO, Optimizely), CRM (HubSpot, Salesforce) and tag management (Google Tag Manager).
- Webhooks support Zapier, Convertro and more.
- Native integration with contact center systems (Mitel, Natterbox, Vocalcom, Cisco, Avaya) to link contact center data to marketing teams.
- API available to extract system data programmatically.

Pricing and support

- Pricing starts at \$25/month, with multiple packages available depending on requirements.
 - SMB: Visitor-level call tracking for small-to-medium businesses.
 - Professional: Visitor-level call tracking for customers with higher usage that will benefit from volume discounting and more extensive analysis.
 - Enterprise: Volume discounting and custom integrations (if required).
 - Agency: Enabling call tracking services to clients to help measure campaign performance. Monthly rolling agreements to enable agencies to add/remove clients.
- Free trials are available.
- Annual contract is not required.
- Solutions, training and project management teams work alongside a dedicated Customer Success Manager.
- All customers receive 24/7 support.
- Training videos, knowledgebase and webinars are included in all packages; Enterprises receive customized training.

Vendor profiles



Invoca

419 State St.
Santa Barbara, CA 93101
T: 877-375-3978
www.invoca.com

Key customers

BC/BS Minnesota
DISH Network
Mutual of Omaha
Truist
University Hospitals

Key executives

Gregg Johnson, CEO
De Anna McPherson, CMO
Michael DiFillippo, CFO
Ben Sullivan, SVP Sales

Target customer

- Marketing, e-commerce, customer experience and sales teams at enterprise and mid-market B2C brands, as well as agencies and performance marketers serving high-value purchase industries, including automotive, healthcare, financial services, insurance, telecommunications, home services and travel.

Company overview

- Founded in 2008.
- 200+ employees.
- Raised over \$100M in six rounds of venture funding, including a \$56M Series E completed in November 2019.
- Launched *Invoca for eCommerce*, *Invoca for Customer Experience* and *Invoca for Sales* in October 2020 to expand services outside the marketing organization.
- PCI DSS, SOC 2 Type 2, Privacy Shield and TRUSTe certified; HIPAA, GDPR and CCPA compliant.

Product overview

- The Active Conversation Intelligence platform enables marketing, sales, customer experience and e-commerce teams to understand and act on the information consumers share via conversations.
 - Integrates with leading technology platforms to turn conversation data into automated action to create better experiences, more conversions and higher revenue.
- Platform features include:
 - Real-time call classification, conversion topic and outcome detection, and call segmentation with artificial intelligence-based conversational analytics and spoken keyword detection.
 - Inbound call tracking on a 1:1 consumer and session-level basis with dynamic number insertion (DNI) for toll-free and local numbers.
 - Call recording that automatically redacts sensitive information like credit card and social security numbers.
 - Customer journey data capture (e.g. campaign, search keyword, product viewed, etc.) with Invoca's first-party JavaScript website tag.
 - Offline conversion data import via file upload or API.
 - Dynamic call routing using data captured before the call (e.g. campaign, calling page, location, language, etc.) to prioritize routing to high-value calls and connect callers to the right agents.

Primary use cases

- Marketing use cases:
 - Measure true marketing performance: Attribute purchases and other phone conversions back to digital campaigns to gain visibility into acquisition costs.
 - Optimize digital campaigns: Make automated, in-the-moment optimizations to campaigns to reduce wasted spend and ensure that media budgets deliver measurable results.
 - Personalize consumer touchpoints: Enhance consumer profiles with conversational data to personalize digital touchpoints, from ad copy to website content.
 - Provide conversational insights: Spot emerging trends, align advertising messaging and inform website copy.

Vendor profiles



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- E-commerce use cases:
 - Understand actual digital abandonment: Tie conversations to individual web sessions to identify exact points where customers exit digital and reach out for human assistance.
 - Diagnose broken e-commerce flows: Tap into conversation intelligence to uncover the motivations that drive calls.
 - Apply insights to improve digital experiences: Make conversation data-driven improvements to digital experiences to improve conversion rates and minimize calls for routine purchases.
- Customer experience use cases:
 - Uncover consumer, competitive, and market insights: Use conversation intelligence to spot emerging trends to align marketing and sales messaging, update agent scripts and adjust the interactive voice response (IVR) experience.
 - Improve end-to-end customer experience: Identify and fix critical CX issues like broken webpages, long hold times, unnecessary transfers and unanswered calls.
 - Understand consumers at a deeper level: Use artificial intelligence (AI) and machine learning to automatically reveal insights into consumers' changing needs.
- Sales use cases:
 - Gain visibility into sales performance: Understand conversational outcomes by division, region and store.
 - Provide agent coaching and feedback: Identify coaching moments to improve agent call handling skills through AI-powered automated call listening and analysis.
 - Reduce call transfers and hold times: Boost profitability by keeping customer support calls out of the sales department.
 - Personalize customer

conversations: Give agents more context on the conversation with screen pops that highlight caller intent, and conditionally route calls to match consumer interest with agent expertise.

In-call analytics

- Signal AI technology uses proprietary machine learning algorithms to enable companies to understand the motivations of each caller, detect and classify the outcome of each call, and identify trends and topics from conversations.
- *Signal Discovery* is a visualization tool for exploring different clusters of conversation topics. Driven by unsupervised machine learning algorithms, *Signal Discovery* automatically analyzes calls and groups them into conversational topics based on similarities in speech patterns.
- Rule-based analytics allow users to create custom rules to classify calls using data such as call duration, spoken keywords, caller demographics and campaign information.

Social media/messaging

- Native integration with Facebook, Instagram and Snapchat advertising to provide insights into campaigns, ad sets and ads driving customers to call and convert offline.
- Invoca is a Facebook Marketing Partner.

Marketing automation

- Insights from each caller and conversation are shared with martech stack platforms to ensure subsequent display, social, email or website experiences are consistent with the last phone conversation.
- Salesforce Marketing Cloud integration delivers call analytics across *Journey Builder*, *Audience Builder*, *Email Studio* and *Data Extensions*.

Vendor profiles



Invoca

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Reporting

- Extensive dashboard and reporting capabilities, along with pre-built integrations to analytics applications and an extensible framework for pushing data to third-party systems.
 - Out-of-the-box dashboards and reports designed for specific marketing, sales, e-commerce and customer experience use cases, including trend reports of calls and outcomes, and call volume by day of week or by hour.
- Reports provide insights into which campaigns are driving calls, including call volume, call duration, top campaigns, keywords, conversation outcomes and call conversion rates.
- 100+ attributes can be reported on for every inbound call, including call source (including keyword or webpage), caller ID, call duration, IVR keypresses, sales conversions and transaction amounts (from CRM), and caller demographics and technographics.
- Users can customize analytics to include business-specific data models, share custom reports with other users and schedule periodic updates via email and in-app notifications.

- APIs, bulk data transfers, and webhooks for integrations with additional martech platforms, including Kenshoo, Marin Software, Microsoft Dynamics 365, Optimizely and Google Marketing Platform.
- Digital telephony integration with any session initiation protocol (SIP) platform provider, including Five9 and Genesys.

Pricing and support

- SaaS pricing based on volume of phone calls and minutes, number of martech integrations, use of conversational analytics and other add-on services, and level of support and services.
- Pricing includes an annual software license fee starting at \$9,000.
- Annual contracts required.
- Free trials available.
- Basic support includes one private training session, 24/7 platform availability and monitoring, 24/7 support portal access, website and email support.
- Dedicated account management, training and 24/7 support are available for an additional fee.

Martech ecosystem integration

- *Invoca Exchange* provides access to 50+ technology partners to import and export Invoca call analytics data into existing technology stacks.
- Native integrations with Adobe Experience Cloud, Google Ads, Google Analytics, Google Marketing Platform, Microsoft Ads, Salesforce Sales and Marketing Clouds, Tealium, FullStory, Quantum Metric, Criteo, Facebook, Snapchat, Instagram and more.

Vendor profiles



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Key customers

AutoTrader U.K.
 British Telecom
 Immobiliare.it
 LaCentrale Group
 OVHcloud
 Zoopla

Key executives

Ryan Gallagher, CEO & Founder
 Belinda Gallagher,
 Chief Experience Officer &
 Founder
 Dan Luis, COO
 Mark Carbonaro, CTO

Target customer

- Enterprise and mid-size businesses looking to incorporate call tracking or speech analytics into an automated marketing process to drive or enhance lead flow. Typical industries served include marketplaces, classifieds, directory services, hospitality and digital agencies.
- The Iovox mobile and web apps are aimed at small businesses and individuals that rely heavily on the phone.

Company overview

- Founded in 2007.
- 50 employees.
- Tier 1 carrier status in multiple countries.
- Call record sources include traffic handled on Iovox's proprietary network, mobile phones and cloud PBX platforms such as Cisco Broadworks.
- Privately held. Octopus Ventures and Columbia Lake Partners are the primary institutional investors.
- Acquired French-based WannaSpeak in 2019.
- Offices in London, Paris, San Francisco and Sydney.
- Including mobile, customers in more than 100 countries.
- GDPR, CCPA and HIPAA compliant.

Product overview

- Offers a combination of inbound call tracking and value-added services to SMB and enterprise accounts.
- Available on a standalone basis via mobile or web app or integrated with a REST API.
 - API modules include: Voice API, Email API, Live Chat API, Call Data API and SMS API.
- New functionality includes mobile and web-based dialer software, enabling outbound calls and customizable Caller ID when used in conjunction with Iovox numbers.
- Launched two new features in 2020:
 - Iovox WebConnect, which adds a call button to any website enabling site visitors to place a call directly from a mobile device, tablet or PC, and includes site attribution features in its analytics. The solution allows for full call tracking functionality without requiring the use of unique telephone numbers.
 - Iovox WebCallBack enables web visitors to request a call back at a time convenient for them.
- Inbound options include both dedicated and dynamic call tracking (source and session based) for conventional marketing automation and conversion tracking.
- Two-way mobile call tracking solution allows individuals and SMBs to track and organize calls made from mobile phones. Companion web app enables additional number purchasing with enhanced features such as transcriptions, call whispers and keyword spotting.
- Mobile call center functionality to allow small teams to form virtual call centers to handle calls when working from home or remotely.
- Iovox Insights uses natural language processing (NLP) and artificial intelligence (AI) to help marketers, sales teams or call centers to identify the reasons for a call and evaluate outcomes and sentiments of every conversation.

Vendor profiles



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www iovox com

- Supplies unique local numbers in hundreds of countries and offers enhanced features such as call whispers, customizable interactive voice response (IVR), call recording and transcription, keyword spotting, web call back, spam filters and blocking, SMS tracking and CRM integration.

Primary use cases

- Static call tracking: To protect the privacy of in-network, marketplace sellers, clients issue unique numbers associated with a product to be sold. Includes call whisper messages to provide simple branded pre-call notification.
- Dynamic call tracking: Enables multichannel marketers to track either the session or source (keyword) of an inbound call and refine their ad mix and spend based on conversion data.
- Mobile call tracking and web app: Mobile app allows sales reps to tag and add notes on call transcription details (Android only) immediately into the CRM within seconds after either an inbound or outbound call. Web app enables advanced features such as call whispers and translations.
- Call center coaching: *iovox Insights* increases the sample size of calls monitored for quality and generates quantitative scoring related to agent performance. Provides coaching opportunities to improve retention among call center staff and better client experience, with quantifiable ROI.
- Enhanced lead generation: Enables customers to create additional avenues for direct and immediate engagement with prospects using iovox WebConnect and WebCallBack.

In-call analytics

- Real-time analytics via widget-based dashboard to help clients gain insight on missed calls, peak call periods, geographic location of callers, source or call channel.
- Uses NLP to evaluate calls for keyword

trends to determine proper post-call follow up, including the reason for the call, the outcome of the call and/or the emotion within the call.

- AI within the platform listens for pitch, loudness, timber, speech rate and pauses in conversation.
- Calls are evaluated in segments, including greeting, call resolution, engagement, quality and overall conversation.

Social media/messaging

- SMS tracking and analytics.
- SMS messaging gateway and text-to-speech for delivery to landline options.
- Click-to-SMS to enable web site visitors to engage with a company via SMS.
- Post-call SMS surveys to measure support interaction effectiveness.

Marketing automation

- Open REST API enables users to tie into a variety of marketing automation systems.
- Integrations with Google, Adobe Analytics, Criteo and DoubleClick allows call tracking numbers to be easily added to ad campaigns or assets as part of an automated workflow with analytics being rendered in the platform.

Reporting

- Flexible reporting based on client needs.
- A widget-style analytics dashboard is accessible via the web, where clients define the parameters of what's important to their businesses.
- Clients using call tracking via API often incorporate iovox call data into their standard reporting tools.

Martech ecosystem integration

- Open REST API enables clients to integrate iovox into off-the-shelf or proprietary workflow tools.
- Mobile solution includes built-in

Vendor profiles



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connectors to Zoho CRM, Salesforce and Microsoft Dynamics 365.

Pricing and support

- Inbound call tracking solution (static and dynamic) bundles based on volume, and include numbers, minutes, advanced analytics and features such as call whispers, recordings, transcriptions and SMS tracking.
- Mobile tracking solution and app are free. Users can upgrade to premium services such as Zoho CRM integration for \$5/user per month.
- Average spend varies depending on client size and type of call tracking

selected (inbound with unique numbers vs. mobile).

- Annual contracts required for inbound solutions; no contract required for mobile call tracking.
- Low-cost trials for inbound solutions. Free trials available for mobile and web app solutions for individuals and SMBs.
- Typical customer provisioning, onboarding and support provided free. API customization or specific work requested by the client is evaluated on a case-by-case basis.

Vendor profiles



Marchex

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www.marchex.com

Key customers

General Motors
Meineke Car Care Centers
Thryv
Wyndham Hotels Group
Zillow

Key executives

Russell Horowitz, Executive Chairman & Co-CEO
Mike Arends, CFO & Co-CEO
John Roswech,
Chief Revenue Officer
Ryan Polley, Chief Product &
Strategy Officer

Target customer

- Enterprise and mid-market brands, multi-location businesses and agencies with clients in a range of verticals, including automotive manufacturing and services, real estate/senior living, home services, healthcare/dental, e-learning/education, insurance, lending and mortgage, and travel.

Company overview

- Founded in 2003; publicly held (NASDAQ: MCHX).
- 250+ employees.
- Offers two major product suites for marketing and sales teams, respectively: *Marchex Marketing Edge* and *Marchex Sales Edge*.
- Owns 30+ technology patents.
- Recent acquisitions include Telmetrics (November 2018), Callcap (November 2018) and Sonar Technologies (December 2019).
- HIPAA, CCPA and EU-US Privacy Shield Framework compliant. TRUSTe verified.

Product overview

- *Marchex Marketing Edge* uses actionable AI to create more high-intent, revenue-generating conversations. The solution enables brand marketers and agencies to connect online marketing campaigns to the revenue-generating offline conversations they drive, and reveal which campaigns and marketing channels have the highest ROI and lowest cost per lead. Key capabilities include:
 - Multichannel attribution dynamic number insertion (DNI) that connects consumer calls, texts, chats and web form completions to marketing campaigns.
 - Integrations with a range of third-party martech, adtech, CRM and chat systems including Salesforce CRM, Adobe Analytics, Google Ads and HubSpot.
 - An intuitive user interface to enable easier campaign management and provide customizable, real-time analytic views that highlight campaign performance.
 - Configurable notifications via SMS and/or email.
- *Marchex Sales Edge* is a conversation intelligence solution designed to improve sales outcomes while delivering a better buying experience. Key capabilities include:
 - Action lists to help focus team's follow-up conversations on the best leads.
 - Deal-saving action alerts so a team specialist can save a lost sale after a conversation ends unsuccessfully.
 - Tools to drive accountability and ensure sellers follow up on leads.
 - Data to support reality-based coaching with sellers following conversations.
 - Intelligent lead scoring, integrations with third-party sales and marketing systems including Salesforce CRM, intuitive KPI dashboards and configurable notifications via SMS and/or email.

Vendor profiles



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Primary use cases

- Media attribution and optimization: Prove digital marketing campaigns are driving revenue-generating conversations and improving marketing ROI through inbound acquisition, media attribution and bid optimization.
- E-commerce: Understand where customers abandon a digital purchase flow to call or text the business, conversation topics and which sources lead to higher sales conversions offline.
- Customer experience (CX): Intelligence to reveal obstacles in the digital-to-offline customer journey that impact offline conversions.
- Sales engagement through improved voice and text conversation handling: Increase sales velocity by providing operational and sales insights that help reduce failed call rates and train customer reps to better discover and understand customer intent and needs.

In-call analytics

- Automatically captures actionable insights from high intent callers, lost opportunity calls for retargeting and "interesting calls" recommended for closer review.
- Measures and analyzes phone conversations in real-time using proprietary AI and machine-learning models for conversations, opportunities and appointments.
- Agent performance tracked by automated "secret shopper" program for every call, identifying top performing agents and best practices.

Marketing automation

- Real-time API integrates analytics data into clients' internal reporting systems.
- Integrates lead data with marketing automation platforms such as Marketo, HubSpot and Kissmetrics, among others.

Reporting

- Analytics data and insights visualized in intuitive, color-coded dashboards.

- 100% keyword-level attribution for every phone call from paid search, including directly from click-to-call and landing pages, and the ability to deliver data into bid management platforms.

Martech ecosystem integration

- Productized integrations with analytics platforms (Google Analytics, Adobe Analytics); paid search/bid management platforms (Kenshoo, Google Ads and Search Ads 360, Acquisio, Adobe Advertising Cloud); CRM platforms (Salesforce Sales Cloud, HubSpot, Automotive Dealer CRMs); and chat platforms (LivePerson, CarNow, Gubagoo, ActivEngage).
- API and webhook integrations with additional ad tech, martech and CRM systems.

Pricing and support

- Marchex Marketing Edge and Sales Edge use a per-call pricing model in the following product packages:
 - *Marketing Edge Core* offers standard call tracking.
 - *Marketing Edge Advantage* offers advanced call analytics including AI-driven conversational intelligence.
 - *Sales Edge Engage* offers conversation intelligence to individual store location's sales teams.
 - *Sales Edge Enterprise* provides benchmark reporting across a network of store locations.
- Annual contracts not required.
- 30-day free trial available for *Marketing Edge*.
- Select product packages include Success Assurance, with an industry-specific Customer Success team, onboarding, training and campaign management support.
- Standard email and phone support provided during regular business hours (6am-5pm PST).
- Add-on Premier support is available 24/7/365.

Vendor profiles



ResponseTap Ltd

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U.S. Headquarters

79 Madison Ave.
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www.responsetap.com

Key customers

DealerOn
Hiscox
Intuit
Mount Sinai Medical Center
Scotia Bank

Key executives

Ross Fobian,
CEO and Co-founder
Steve Gardner, CFO

Target customer

- Mid-sized and enterprise call-centric brands and agencies, typically within financial services and insurance, utilities, travel and leisure, retail, automotive, healthcare and consumer services.

Company overview

- Founded in June 2008 as AdInsight; rebranded as ResponseTap in 2013.
- 80 employees.
- Serves over 2,750 clients and more than 300 agencies.
- GDPR compliant.
 - Personal phone numbers hashed and removed from call logs. New call recording options available based upon customer consent.
 - GDPR client community created, featuring a compilation of FAQs and other informational content.

Product overview

- Connects the online customer journey to inbound phone calls.

Primary use cases

- Bid optimization: Measure phone sales and revenue by individual Google PPC campaign to optimize bids and increase ROI.
- Marketing optimization: Understand which marketing campaigns lead to highest value calls to inform future activity.
- Call personalization: Use the online journey to tailor the customer experience, including routing with no need for an interactive voice response (IVR), call prioritization, agent prompts or agent pairing.

In-call analytics

- Artificial intelligence (AI) and natural language processing-driven (NLP) speech transcription with outcome capture, topic extraction and tagging.
- Machine learning used to automatically determine call outcomes.

Social media/messaging

- Facebook and Instagram integration show call conversions with Facebook Ads Manager.
- Dedicated phone numbers can be added to social media ads.
- Clickthroughs from social channels are automatically tracked and campaigns optimized accordingly.

Vendor profiles



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U.S. Headquarters

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Marketing automation

- Includes sales enablement tools that link to contact centers and CRMs to connect the online customer experience to offline calls.
- Accurate measurement of phone sales value within existing marketing automation systems, including HubSpot, IBM Marketing Cloud and Marketo.
- Personalized customer journeys by combining phone calls with online touchpoints.
- Call tracking across multiple channels to optimize both online and offline campaigns and reduce cost per account (CPA).

Reporting

- *Insight Hub* provides fast, intuitive reports within a customizable dashboard.
- *Acquisition Overview* report provides visibility on all campaigns and marketing activity in one place.
 - Users can toggle between campaign, channel or media views for insights into which marketing activity is generating the most calls, revenue and profit.
 - Users can choose to report in whichever attribution model is relevant to their business.
- *Attribution Comparison* report compares multiple attribution models based on different measures, such as call volume, sales revenue and profit.
- *Google Ads* report provides insight into which ad groups and keywords have driven calls.
- Algorithm matches revenue data from an uploaded sales report to the phone call to understand the value as well as volume of calls.
- Call log allows for campaign detail to be viewed for each individual call.

Martech ecosystem integration

- Offers native integration with the following martech systems:
 - Personalization: Qubit, Visual Website Optimizer, Tealium, Adobe Target, Content Square, Oracle Maxymiser, Optimizely and Dynamic Yield.
 - Analytics: Google Analytics, Adobe Analytics, Fox Metrics, IBM Analytics and Webtrekk.
 - PPC management: Google Ads, Bing Ads, Marin Software, Kenshoo and Search Ads 360.
 - Display: Display & Video 360, RocketFuel, Adform, Criteo, Sizmek, Facebook and Flashtalking.
 - Audience/data management: Adobe Audience Manager, Quantcast, Google Analytics 360 Suite and Weborama.
 - Affiliate advertising: Awin, Affiliate Future and Cake.
 - CRM: Salesforce, Zoho, HubSpot, Infusionsoft and Microsoft Dynamics 360 via automation tools.
 - Call center: Cisco Finesse, Amazon Connect, Twilio and Avaya Breeze.
 - Email: InfusionSoft and HubSpot.

Pricing and support

- Pricing ranges from \$399-\$1,299/ month and is based on the volume of phone numbers and minutes.
 - SaaS-based pricing available.
- One-time setup fees range from \$99-\$349.
- Free trials available.
- Discounts available for annual contracts (not required).
- Phone and email support included (4am-8pm EST).
- More advanced reporting, integrations and insight (data science) services are available for an additional fee.

Resources

Websites

DigitalMarketingDepot.com
MarketingLand.com
MarTechToday.com
SearchEngineLand.com

Articles

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"Verizon Says Call Volume Soars as Stay-at-Home Becomes the Norm," by Rich Duprey, The Motley Fool. April 1, 2020.

"What the Numbers Tell Us about the Current Voice Search Opportunity," by Andy Taylor, Associate Director of Research, Merkle. April 2019.

Research Reports

Call Commerce: A \$1 Trillion Engine. A CMO Guide to the Click-to-Call Opportunity. Published by BIA Advisory Services.

G2 Enterprise Grid Report for Inbound Call Tracking/Summer 2020, published by G2, Inc.

High-Stakes Purchases and Consumer Confidence in the COVID Era, published by Invoca. November 2020.

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The Smart Audio Report, published by National Public Media. April 2020.

Unlock Voice-Of-The-Customer Insights from the Call Channel to Fuel Marketing and Drive Revenue, published by DialogTech and Forrester Research. November 2020.