

The Digital Marketer's Guide to Personalizing Caller Experiences

7 Personalization Strategies to
Convert More Callers to Customers



The Customer Journey Is Calling

Digital advertising has gone mobile. And when consumers engage with a company's digital ads and website on their smartphones, they often convert in the most convenient and immediate way: by calling.

Thanks to smartphones, the volume of call conversions from digital advertising has exploded. Research predicts that calls to US businesses from mobile search, social, and display ads will reach 162 billion in 2019, a 110% increase from 2014.

Inbound calls have become a common part of the customer journey. To drive growth and monetize this increasingly important voice channel, however, businesses must do more than feature a phone number or call button on their ads and website — you must make each caller's experience a great one.

In today's mobile world, the customer experience when someone calls must be as frictionless, relevant, and personalized as the online experience.

Much of that responsibility falls on the shoulders of the marketing team, in part because your digital campaigns and website content are what generate those calls. But also because the quality of the call experience can make it or break your ROI.

Even though marketers aren't answering calls from search, social, display, and other channels, there are marketing strategies and technologies you can use to personalize the caller experience — just like you do the online experience — and help your business convert more callers to customers. This eBook explains what they are.

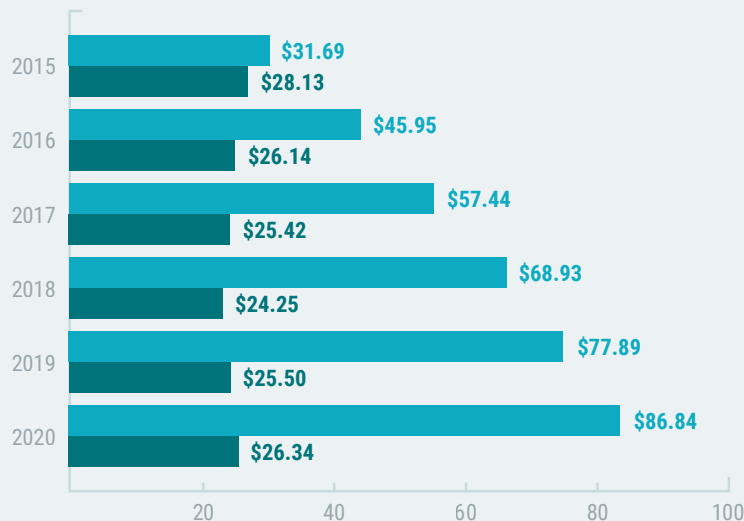
Digital Advertising Is Competitive

Digital advertising is ruthlessly competitive. Last year for the first time, marketers in the United States spent more on digital advertising than on TV ads. By 2020, nearly half of all advertising dollars in the US will go towards search, Facebook, and display ads.

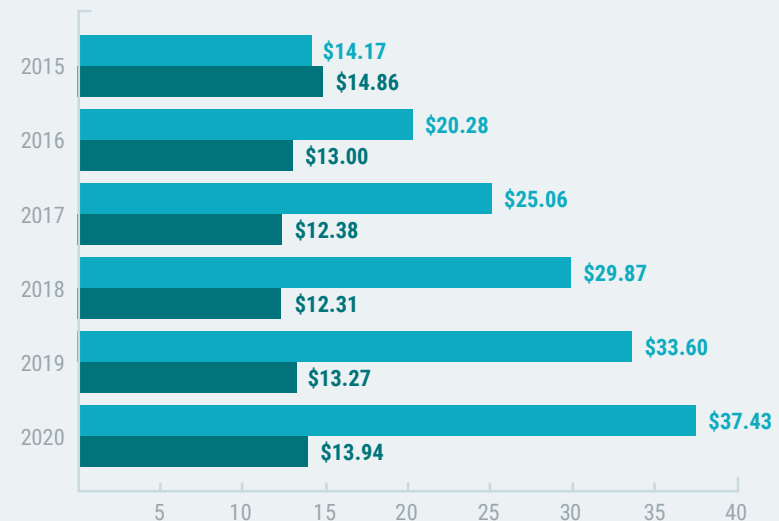
It's a powerful testament to the importance of digital advertising — and especially mobile advertising — in the modern marketing mix. Mobile dominates digital, with nearly 74% of digital ads expected to target smartphones and mobile devices this year.

The stakes for digital have never been higher. And as spend rises, so does the pressure on marketers to optimize campaign performance to win the most customers at the lowest costs. To do it, the world's most successful marketers are embracing new personalization strategies to drive conversions and improve the return on their growing investment in digital advertising.

US Digital Ad Spend by Device (IN BILLIONS)



US Search Ad Spend by Device (IN BILLIONS)



MOBILE DESKTOP

What Is Personalization?

Personalization is a collection of marketing strategies that use data to guide, extend, and enhance consumer interactions with a brand by basing them on a person's history, preferences, and intent.

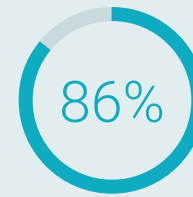
Think about the last time you shopped online with Amazon: they recognized who you are immediately and made recommendations based on your past behavior and interests. If you left the site or app without making a purchase, you probably saw ads for the products you browsed the next time you visited Facebook or other sites on the Internet. Amazon probably emailed you multiple times reminding you – and perhaps incentivizing you – to finalize your purchase of those products.

Those are all examples of personalization. It's the idea that a brand can use signals from customers to deliver tailored, relevant ads, emails, website content, and experiences no matter how and where they interact. When done well, personalization can influence customer behavior, increase revenue, enhance loyalty, and lower acquisition costs.

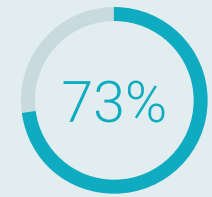
Consumers Expect Personalized Experiences



of consumers say it's important that brands recognize them across all channels and devices



of consumers say personalization plays a role in their purchasing decisions



prefer to do business with brands that use their information to personalize shopping experiences

Harvard Business Review Found Personalization Leads To:

50%

reduction in customer acquisition costs

5–15%

increase in revenue

10–30%

increase in efficiency of marketing spend

Personalize the Entire Digital Journey

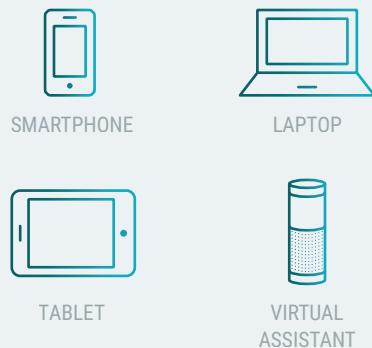
Every touchpoint along the customer journey is fair game for personalization. And in today's omni-channel world where consumers shop using multiple devices, channels, and conversion paths, those touchpoints have multiplied exponentially.

A typical digital journey today could start with a consumer researching a purchase on their smartphone, then continuing later on a laptop or tablet. They might visit your site after engaging with your search ad and begin a chat session with a rep. They might call your business a few days later after getting one of your emails and finalize their purchase in person at your closest brick-and-mortar location.

A survey by Econsultancy found that at least 50% of respondents were using 13 different touchpoints throughout their customer journey. Marketers today must think like their customers and create personalized connections throughout the entire digital journey: not just online, but offline. Remember, consumers don't care which channel you've prioritized. They only care about the channel they are engaging with at the moment.

The Increasingly Complex Digital Journey

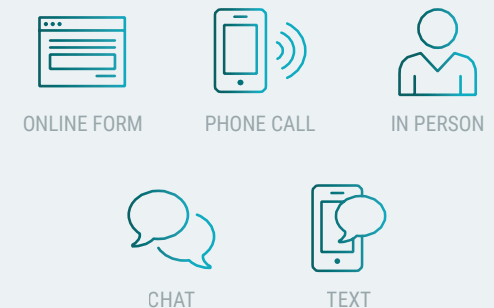
Multiple Devices



Multiple Channels



Multiple Conversion Paths



Deliver Personalized Call Experiences to Win More Customers


Every customer experience is a moment of truth. Customers assume that you know who they are and what they want at all times, across all channels. If you raise expectations through digital advertising but fail to deliver when the customer calls, your marketing ROI plummets and your business suffers.

Smartphone Users Convert by Calling

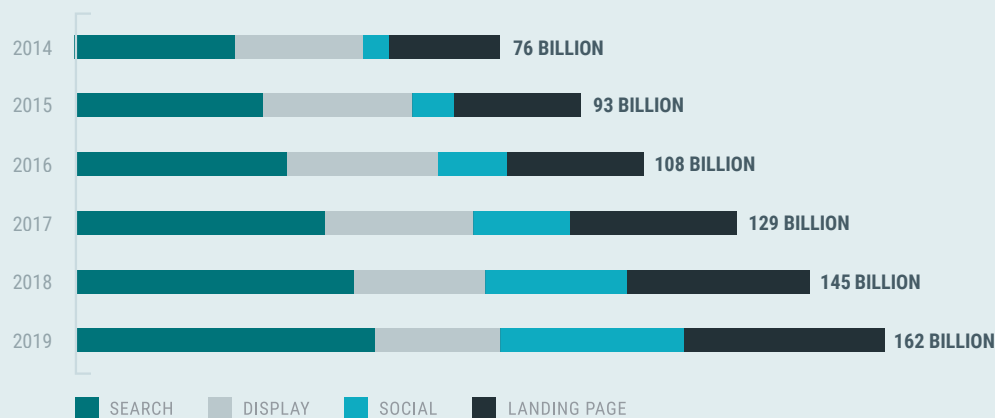
And make no mistake, customers are calling. Smartphones and the explosion in mobile advertising have changed the way consumers interact with businesses. When consumers run searches or engage with digital ads, emails, and website content on their smartphones, they often convert by calling.

According to Google, mobile searchers are:

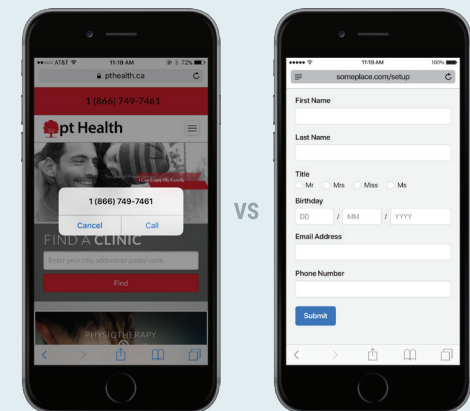
 **40%** MORE LIKELY TO CALL A BUSINESS

 **51%** MORE LIKELY TO MAKE A PURCHASE

110% Growth in Calls to US Businesses From Digital Ads Targeting Smartphones (2014–2019)

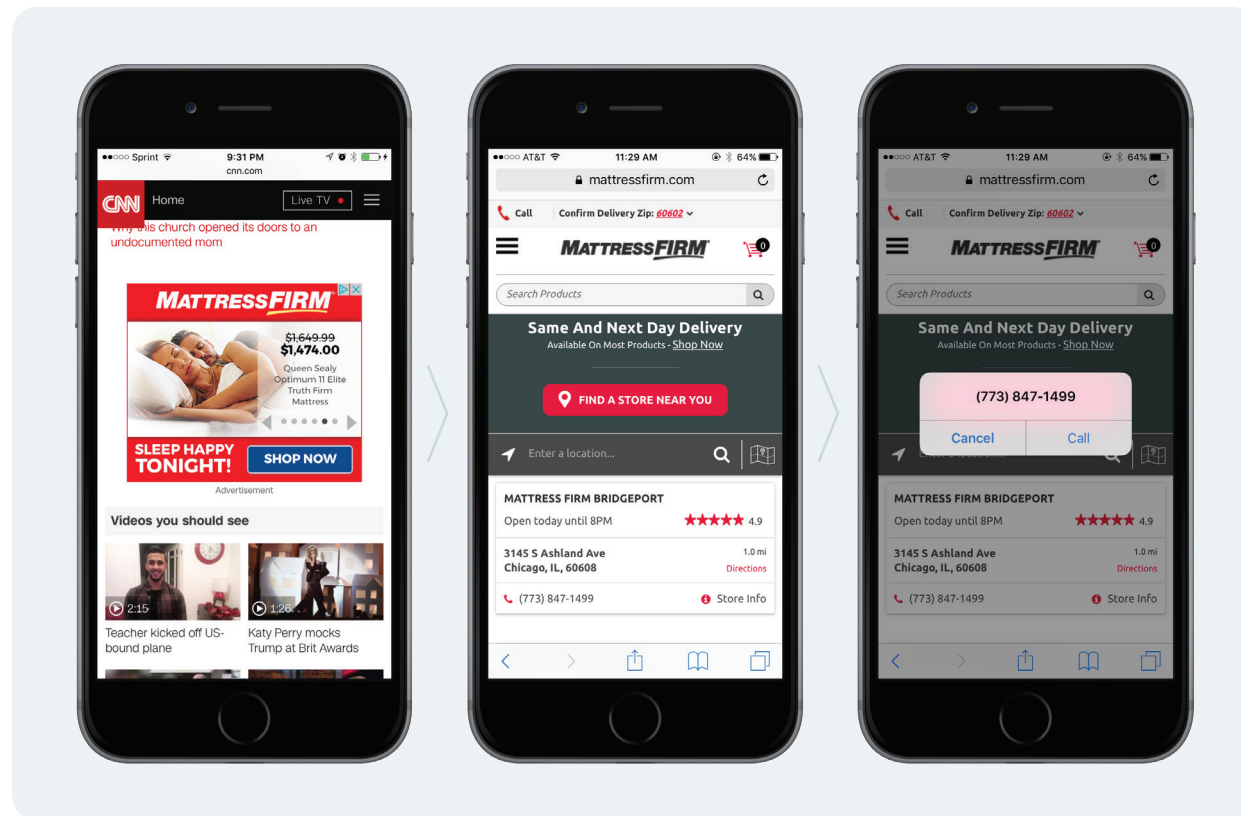


Click-to-call is easier and faster than filling out a web form



Inbound Calls Are Huge Revenue Drivers

Inbound calls are often the most valuable leads. Someone who calls a business usually has higher purchasing intent and is further along in the customer journey than someone who fills out a web form. Plus a caller is a live lead that businesses can close and upsell right away.



Calls convert to revenue

10x–15x

more than web leads.

Calls will influence

\$1 trillion

in us consumer spending this year.

“Customers who initiate inbound calls convert faster, spend more, and have a higher retention rate.”

FORRESTER.

Many Purchases Don't Happen Without a Phone Conversation

Calls are an important part of the customer journey for industries with complex, expensive, infrequent, or urgent purchases. Consumers want to call and speak to a real person, regardless of the device they use to research a product or service. For marketers in these industries, your ROI hinges not only on your ability to drive calls, but on providing those callers with the right experiences to convert to customers.

Businesses with Products or Services That Are Complex, Expensive, Infrequent, or Urgent Want Phone Calls



25% of auto shoppers first contact a dealership by calling



40% want to learn about education programs with a phone conversation



75% of insurance shoppers call an agent or contact center



35% of hotel bookings are from phone calls



68% want to call while researching financial services



88% of health care patients book appointments over the phone



39% make a telecom purchase by calling



70% want to call businesses to purchase home services

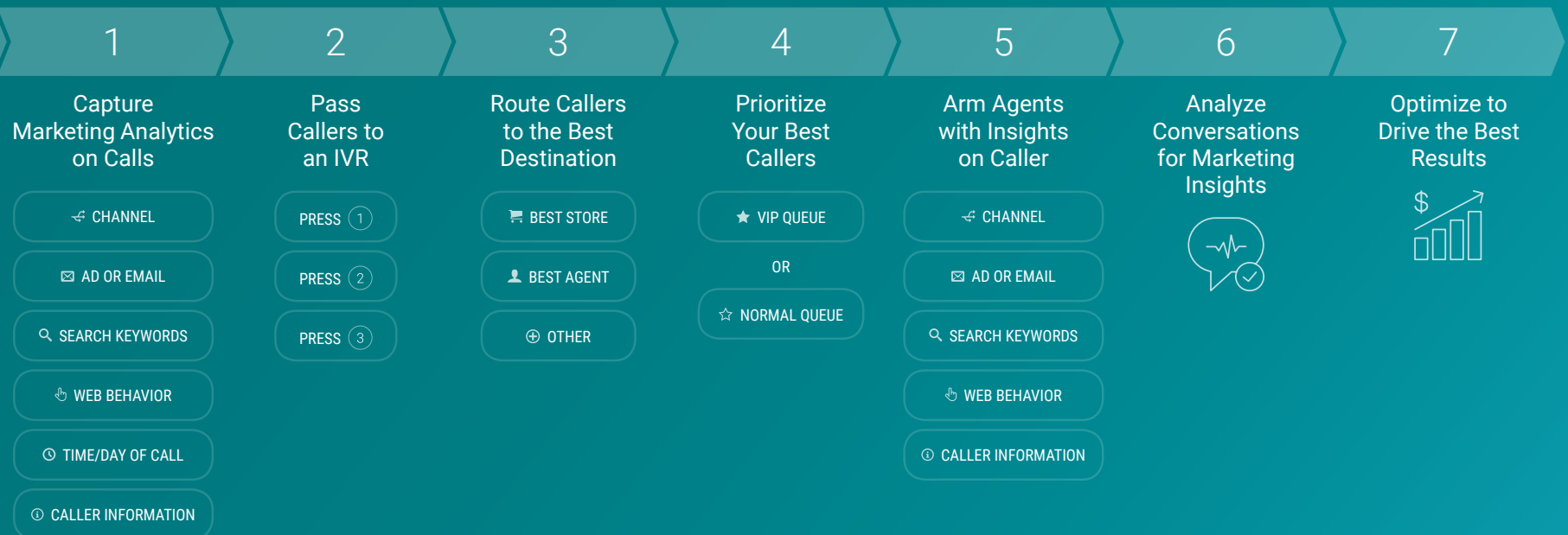
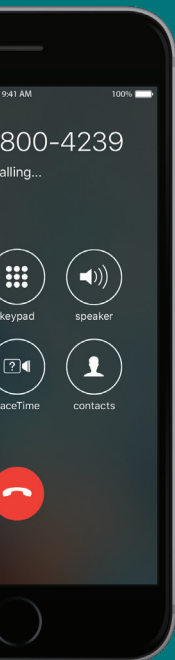


The Caller Experience Matters to Digital Marketers

For marketers under pressure to drive not just leads but revenue, creating digital campaigns that drive calls isn't enough. Whether a caller from your digital advertising converts and stays loyal often depends on the quality of the call experience. Studies show that 84% of callers would cease doing business with a company after a negative call. Unanswered calls, long wait times, and unhelpful agents are among the top complaints consumers have when calling businesses. Personalization strategies can help your business turn more of these callers to customers.



7 Personalization Strategies to Convert More Callers to Customers



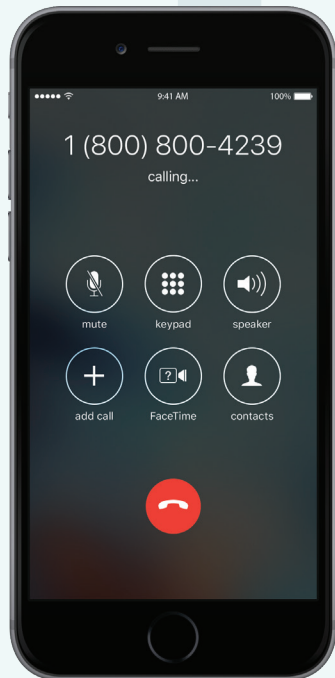
1. Capture Marketing Analytics on Calls

In a study by The Economist, 86% of CMOs and senior marketing executives said they will own the end-to-end customer experience by 2020. That includes the experience when consumers call the business.

Unfortunately, the call experience is often the last engagement for marketers to optimize, often because they lack the necessary insights into the consumer at the time of the call. Personalization requires an understanding of your audience – their needs, interests, expectations, buying habits, and history – and then building out the right strategy from there.

So the first thing needed to personalize the call experience is to capture data on each caller and what drove them to call you in real time: when the call is generated. This includes information on the caller – who they are, their geographic location, if they are a new or repeat caller – and the interaction with your digital marketing and website that got them to call.

The right call analytics solution can provide that data for you. Having those insights available at the time of the call is essential to personalization, but how you use them to tailor the experience will depend on the structure of your business and sales organization, your marketing campaigns, and where the calls are going (more on this later).



Capture Information on the Caller and What Drove the Call

1. What Drove the Call

- Marketing channel
- Ad or email
- Search keywords
- Website interaction & page they called from

2. Caller Data

- Name & phone number
- Geographic location
- New or repeat caller
- Device, OS & browser



2. Pass Callers to an IVR

IVR (interactive voice response) is an automated program that callers interact with via voice or phone keypad. They are a common way for businesses to provide assistance to callers 24/7, asking them the questions needed to determine if callers are valid sales leads and how best to route them.

IVRs have cost- and time-saving benefits for businesses, especially those receiving high volumes of inbound calls. They eliminate the need for your staff to spend time manually qualifying callers. They can also be an effective barrier for filtering out junk calls, robot dialers, and fraudulent callers.

IVRs can capture additional data directly from the caller that you might not be capturing automatically with a call analytics solution. It's also why some call analytics come with IVR technology. For example, mattress retailer Sleep Train uses IVRs they built with the DialogTech call analytics solution to determine if callers should be routed to one of their 300 stores or to their call center to make a purchase over the phone or get help with financing. They get over 50,000 calls a month, and the IVR helps provide each caller with efficient, effective service.

How Sleep Train Uses IVR to Route Callers Effectively

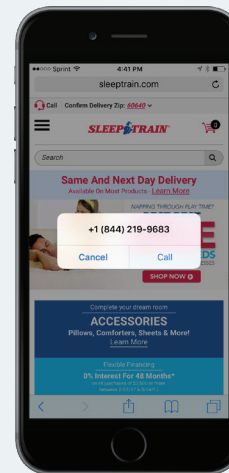
WHO THEY ARE



- Mattress retailer with 300 stores
- Purchased by Mattress Firm

"DialogTech's IVR enables us to offer thousands of daily callers amazing customer service."

Sleep Train's marketing generates 50,000+ calls a month



IVR Options

Press 1 for store nearest you



Press 2 to order over the phone



Press 3 to learn about financing

3. Route Callers to the Best Destination

When consumers call, it's important to connect them quickly in conversation with the right location or agent. To do it, marketers are using intelligence on the consumer and what drove the call – the data covered in the first two strategies in this guide – to automatically route each caller for the best result.

The same call analytics solution you use to capture data at the time of the call can be used to control how it gets routed. Marketers can set up rules and logic to automatically route inbound callers to the best location or agent based on a wide variety of data captured by the call analytics solution.

For example, an insurance company might route callers based on the marketing source that drove the call. So a consumer who called after searching for “car insurance in Illinois” can get automatically routed to the best agent in the call center or local branch to assist them. But another consumer who called from their webpage on life insurance will be sent to the agents responsible for those products.

In another example, Monroe Engineering, a leading distributor of industrial components, has sales engineers taking calls in offices throughout the United States. They have set up rules so their call analytics solution automatically routes callers based on time of day and location. “So any caller located on the west coast gets routed to our west coast offices, but other callers get routed based on time of day,” said Kevin Budzynski, CMO at Monroe. “Calls in the morning go to east coast locations, and calls in the late afternoon and evening go to the west coast. It ensures a Monroe engineer is always there to answer calls from our digital advertising.”

Marketers Should Determine the Best Ways to Route Callers



Route by Caller Location



Route by Time of Day



Route by Day of Week



Route by Marketing Source



Route by Agent Expertise



Route by IVR Response



Route via Round Robin



Route to All Phones at Once



Route to Group of Agents



Route Unanswered Calls Differently

4. Prioritize Your Best Callers

Consumers hate to wait on hold, and forcing callers with high-purchasing intent to wait increases the chances you lose the customer.

So if you have certain campaigns or search keywords with a proven track record of generating high-converting leads, make sure those callers get answered right away. Have them “jump the line” by sending them to a priority queue for high-value callers where an agent can assist them immediately.

Prioritize Calls from Your Best Channels or Keywords

If paid search is your best converting channel, for example, answer those calls right away.



VIP Call Queue

 Google AdWords  Bing ads

Regular Call Queue



5. Arm Agents with Insights on Callers

Routing the caller to the best destination is one thing — knowing what to say is another. That's why many businesses pass information on the caller and marketing source that drove the call to their agents before connecting them in conversation. Knowing a caller's online activity before a call helps agents deliver a more seamless experience and tailor the conversation to win the sale.

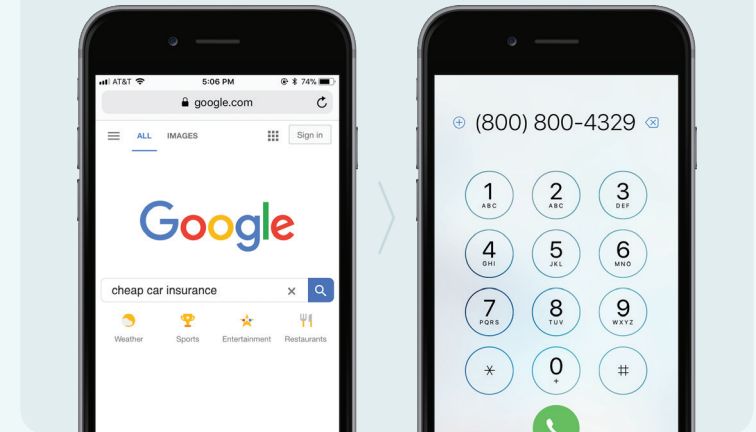
Some call analytics solutions can provide this data at the time of the call, usually in one of two ways:

- **On your laptop or desktop:** For agents in front of their computers, data on each inbound call can be displayed in a pop-up on their monitors. If your business uses a CRM system like Salesforce or a call center solution like Genesys or Amazon Connect, that data can be displayed within those platforms as well.
- **Via an audible voice message:** For agents at store locations, working remotely, or answering calls away from their laptops, information on the call can be relayed via an automated whisper message. The message can also ask agents if they want to accept the call before being connected in conversation.

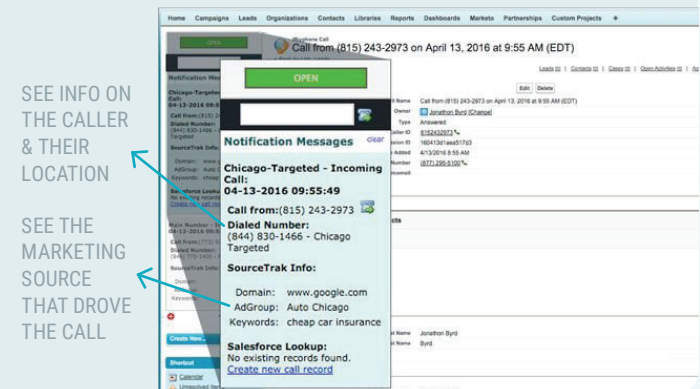
Business lender SnapCap shows their agents in Salesforce the channel, ad, search keyword, and webpage that drove the call. "Knowing if the person is calling from a search ad after actively looking for our services versus calling after they happened to see our social ads helps agents frame the conversation," says Mack Johnston, VP of Data & Analytics at SnapCap.

Real estate brand Sotheby's has agents taking calls on the go. When they answer, agents hear a whisper message relaying the marketing source and property the lead is calling about. For example, an agent might hear "Call from Zillow for 120 Peacock Rd." "When agents know where the call is coming from, they immediately know the quality of that lead," said Brad Nelson, VP of Marketing at Sotheby's.

Marketing Interaction Generates a Call



Analytics on the Caller Presented to Sales Agent



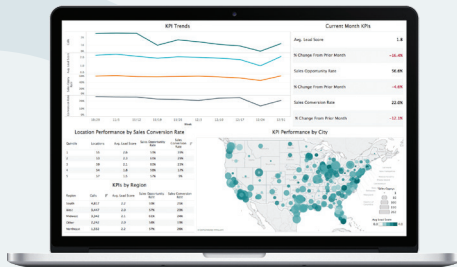
6. Analyze Conversations for Marketing Insights

Marketers should analyze what happens on the calls they generate from their digital (and offline) advertising. Analyzing conversations provides a wealth of information on callers, their intent, and the value of calls from each marketing source you can use to make smarter optimizations. For example, you can learn which ads, keywords, and programs drive the best sales calls, if ad messaging and promotions are resonating, and why calls did or did not convert to customers.

Analyzing how calls are handled helps you detect and correct issues that negatively impact ROI. You can see what percentage of calls aren't being answered at each location and which agents are best (and worst) at converting callers to customers. Correcting issues with how locations and agents handle calls – and having agents call good leads back after a bad call experience – helps ensure you aren't throwing away marketing budget on mishandled calls.

Two Ways to Analyze Conversations Using a Call Analytics Solution

1. AI and Machine Learning



AI algorithms analyze calls for you, scoring conversations and delivering insights to you in easy-to-understand reports.

2. Recordings & Transcriptions



Access recordings and transcriptions of calls to each agent and analyze conversations for insights.

Four Examples of Analyzing Conversations



1. Comfort Keepers Uses AI to Analyze Lead Quality

Comfort Keepers is one of the nation's leading providers of in-home care for seniors, with over 450 franchise locations. Since phone calls make up 70% of their marketing conversions, they use AI to automatically analyze the calls they drive to each franchisee to determine lead quality. "Instead of saying, 'Hey, we drove 2,000 calls this week,' I can say we drove X number of new customer calls," said Bryan Huber, Global Vice President, Digital Marketing at Comfort Keepers.



2. Sylvan Identifies and Assist Underperforming Locations

Sylvan Learning is the leading supplemental education provider for children in grades K-12, with more than 750 locations. Sylvan's marketing team uses conversation analytics to monitor what is happening on the inbound calls they send to their 750 locations. "If there is a certain brick-and-mortar location whose numbers aren't measuring up to the rest of the system," said Seth Lueck, Senior Online and SEM Manager at Sylvan, "we will dig into the Conversation Insights to look if they are seeing more calls than normal going to voicemail, if they are promoting a national offer... and that allows us to proactively reach out to them and provide those recommendations."

Four Examples of Analyzing Conversations



3. Central Mines Conversations to Improve SEO and Website Conversions

Central Restaurant Products is the leading wholesale distributor of foodservice equipment. Inbound calls make up 56% of orders and 81% of total revenue. “We can quickly look at the source of a call – say a Google shopping ad – then dive into the actual phone conversation to see if it was a quality lead,” says Nathan Smith, Marketing Database Analyst at Central. “Or we can analyze calls from a specific product’s webpage to see what questions callers are asking, then have our content team update the details on that page to answer them.”



4. DSO Determines if the Caller Is a New or Existing Customer

Many marketing teams don’t want to waste budget getting existing customers to call. That’s why a dental support organization (DSO) with 25 offices nationwide analyzes the calls they send to each location to determine if they are a new or repeat caller. The marketing team has selected a robust set of keywords that when spoken indicate the nature of the call and whether it is from a new patient or existing client. “Seeing that AdWords unbranded keywords generate calls and appointments from new patients at a higher rate than direct mail in a specific market, for example, is powerful data to improve our marketing and reduce our cost per call,” said the Director of Marketing at the DSO.

7. Optimize to Drive the Best Results

The previous six personalization strategies can help your business reduce unanswered and abandoned calls, provide more relevant call experiences, and convert more callers to customers. All of which will improve your marketing ROI.

Once you start personalizing the call experience, however, it's important to be diligent about measuring results and making optimizations. For example, if there are certain sales agents more successful at converting callers to customers, consider routing a higher percentage of calls to them. Or if you know that certain locations are underperforming, provide them with scripts and coaching to have better calls.

Use Call Analytics to Personalize Online Experiences

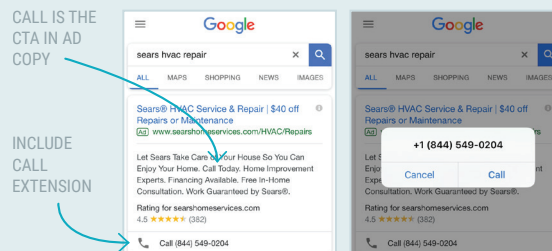
You should also use what happens on calls to improve your digital marketing. If you see certain channels, ads, or search keywords are generating more high-value calls, increase your spend. And you can use call analytics data to personalize the online experience:

- Retarget callers who didn't convert to customers with the most relevant search, social, and display ads
- Expand your reach and acquire new customers by targeting lookalike audiences similar to customers who converted by calling
- Exclude callers who did become customers or weren't good sales leads from seeing your ads

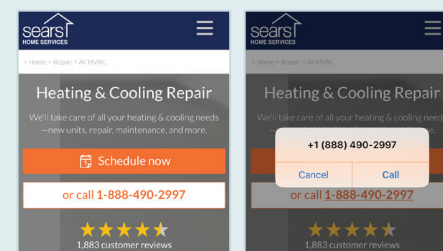
When done well, online and offline channels should work together, providing a learning loop that marketers can use to personalize experiences, optimize ROI, acquire more loyal customers, and drive revenue.

If someone calls and is a good lead, retarget them with ads encouraging them to call again

Retarget them with ads optimized for calls



Send to a landing page with a "call now" CTA



Eight Questions to Help You Determine How to Personalize Caller Experiences

Routing Callers

1. What are all the locations people can call from your digital marketing and website? For example, can calls go to one or more call centers, offices, store locations, or remote agents?
2. If you have multiple call centers, locations, or agents receiving calls, what factors should determine who gets which call? For example, should callers be routed based on their geography, product interest, or history?
3. What days of the week and hours of the day are locations, call centers, or remote agents taking calls? If someone calls outside these times, how should that caller be routed?

Qualifying Callers

4. If you are sending calls to multiple destinations (stores, call centers, agents), what factors determine where the caller should be sent?
5. Are there questions you would ask callers to determine how best to route them? If so, what are they?

Prioritizing Callers

6. Are callers from certain marketing campaigns or webpages more valuable to your business? For example, do callers from paid search convert to customers at higher rates?
7. If callers get placed on hold or in a call queue, is it first come first serve, or should certain callers get answered first? If so, which ones?

Arming Sales Agents

8. Is there data about the caller (e.g., who they are, their geographic location, their history, the marketing source that drove the call) your sales agents would like to know before beginning the conversation?

DialogTech Is the World Leader in Call Analytics and Personalization

DialogTech is a powerful marketing analytics tool that shows you how your digital advertising, webpages, and offline marketing drive calls and customers. It works for calls from any marketing source to any store, office, call center, or agent — regardless of the phone system. DialogTech also provides tools to personalize the caller experience to help businesses convert more calls to customers.

Keyword-Level Tracking Dynamic number insertion (DNI) captures the channel, ad, and search keywords that drove each call.	Website Tracking Capture each caller's complete interaction with your website, including the webpage they called from.	Caller Profile Data Know the caller's name, geographic location, and OS/device, if they are a new or repeat caller, and more.
Recordings & Transcriptions Review and share recordings and transcriptions of every inbound call to every store, office, call center, or agent.	Conversation Analytics Filter calls by location, marketing source, spoken words, and more — drill into recordings and transcriptions for deeper analysis.	AI & Machine Learning Have AI analyze calls for you to measure intent, score lead quality, detect problems, and automate best actions.
Integrations Pass call data to your CRM, marketing tools, digital ad platforms, and call center solutions.	Ad Targeting Target past callers and new audiences likely to call with the right search, social, and display ads.	Caller Insights When calls come in, arm agents with marketing insights on who each caller is and why they are calling.
IVR Answer, assist, and qualify callers 24/7 with professional IVRs that you can build yourself without IT.	Contextual Call Routing Route calls based on the caller's geographic location, day and time, marketing source, caller history, and much more.	Call Forwarding Ring multiple phones at once or in any order — if no one answers, send calls to another person, group, or voicemail.

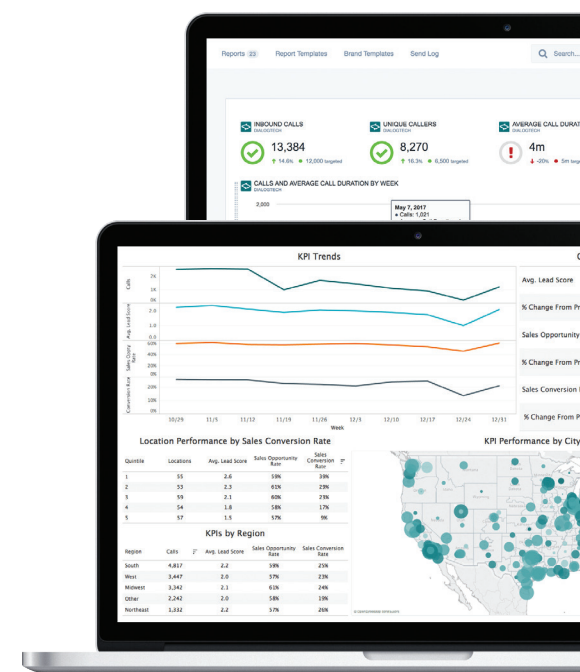
The World's Best Brands Use DialogTech

Angie's list  TOYOTA

COMCAST  Comfort Keepers

sears  Humana

Sylvan Learning  T-Mobile



Next Steps

I hope you found this guide helpful as you consider personalizing the caller experience to generate customers and revenue. To stay on top of the latest news and best practices around call analytics and optimization, visit the DialogTech website at **dialogtech.com**.

If you are interested in evaluating the DialogTech call analytics solution, please call us at 866.912.8541 or schedule a call and a personal walkthrough of the platform at **dialogtech.com/request-demo**.

About DialogTech

DialogTech provides actionable marketing analytics for businesses that value inbound calls. Consistently recognized as the leader and pioneer in call analytics and optimization, DialogTech is the trusted solution for Fortune 500 brands, agencies, and fast-growing companies. Through AI-driven insights, omni-channel reports, seamless integrations, and world-class support, DialogTech delivers unprecedented intelligence on inbound calls marketers use to optimize ROI, drive revenue, and deliver more personalized customer experiences.

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