

MARTECH INTELLIGENCE REPORT

# ENTERPRISE CALL ANALYTICS PLATFORMS: *A MARKETER'S GUIDE*

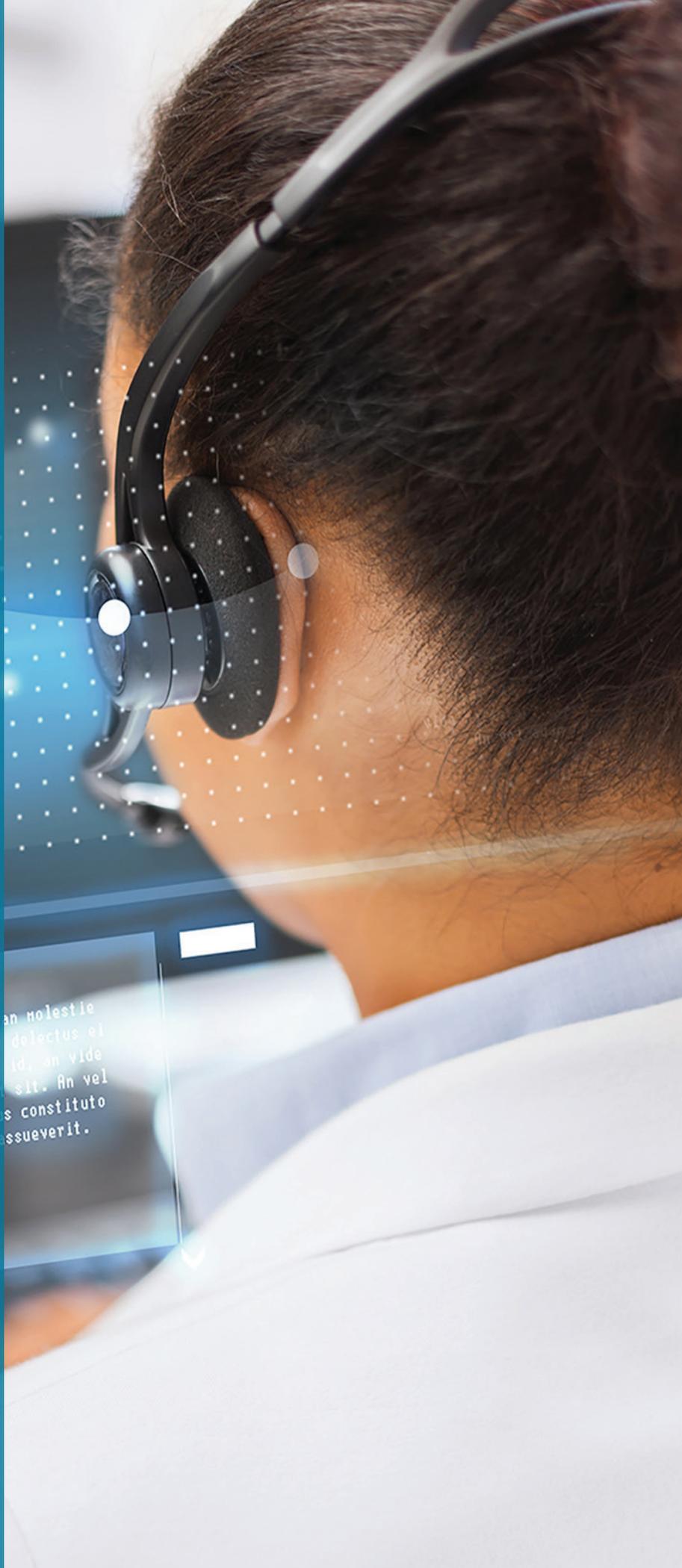
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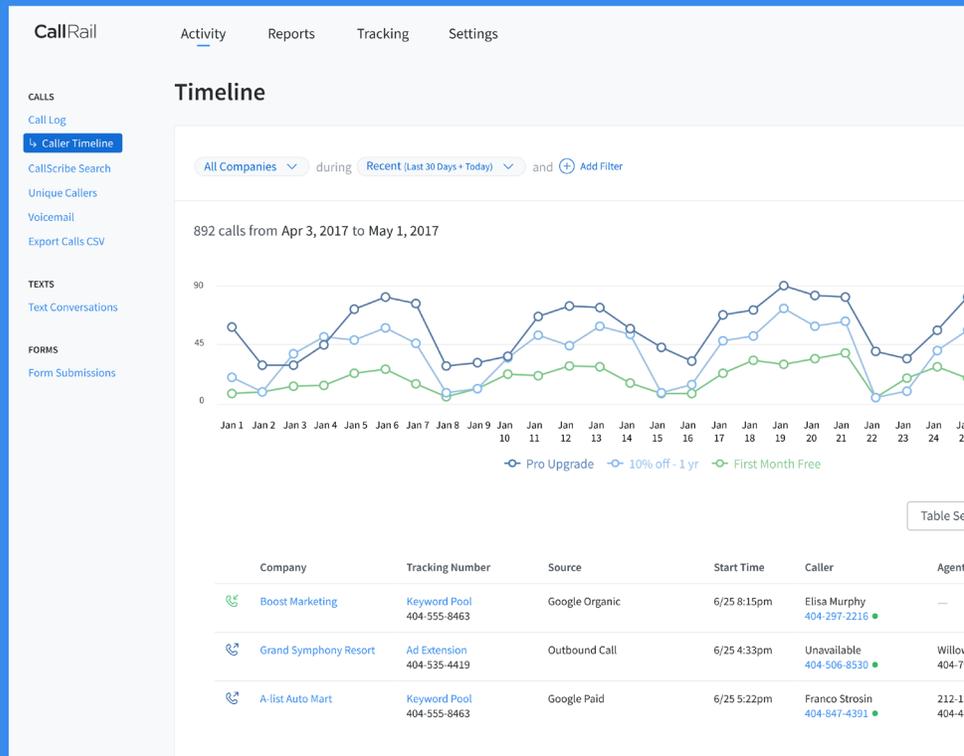
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## Scope and methodology

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 create 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 May 2018 publication to include the latest industry statistics, developing market trends and new product 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 13 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 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 April and May 2019. These, in addition to third-party research, form the basis for this report.

### June 2019

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# Call analytics market overview

Today's consumers have made mobile calls an integral part of their purchase journeys, as they seek more immediate gratification of their business information wants and needs. BIA Advisory Services predicts that more than 147 billion inbound mobile calls will be made to US businesses in 2019, a figure expected to rise to 170 billion in 2020.

BrightLocal research also found that 60 percent of US consumers prefer to contact a business by phone after finding them online – compared to just 16 percent who prefer email and 15 percent who prefer to visit the business location.

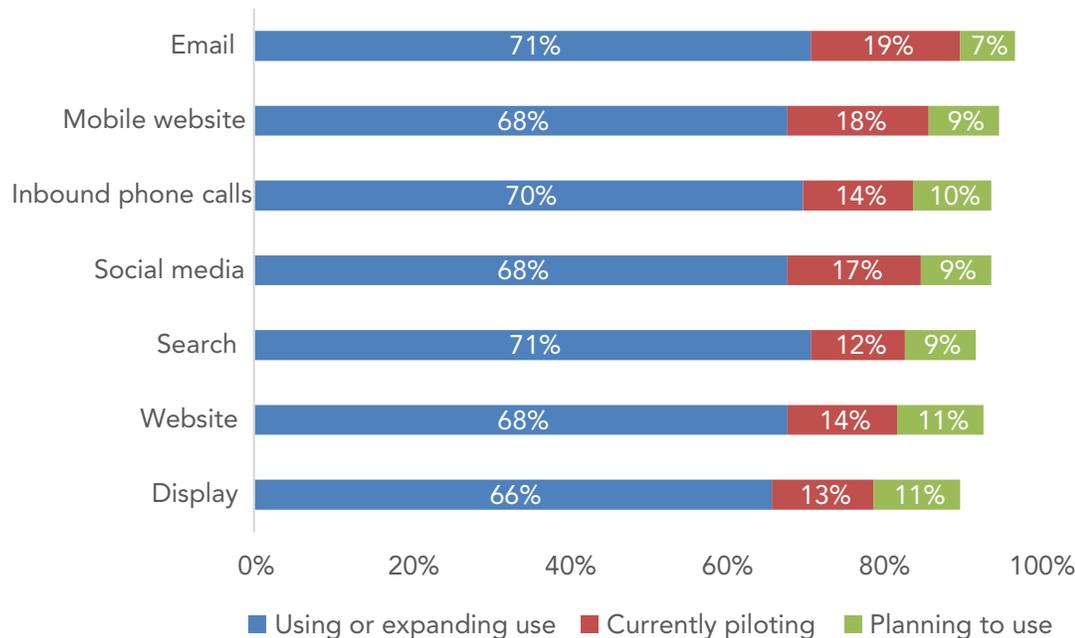
Phone calls provide deep-in-the-funnel prospects with fast answers, connections to real people and the type of detailed information that can play an important role in high-consideration purchases. For marketers, inbound callers are proving to be highly engaged with brands, and convert more quickly than consumers that do not use the phone to interact with businesses.

According to *Pick up the Phone: Your Best Customer Is On the Line*, published by Forrester Consulting, the majority of marketers using ads that prompt consumers to initiate a phone call say those consumers:

- Have a 28 percent higher retention rate.
- Convert an average of 30 percent faster.
- Spend an average of 28 percent more.

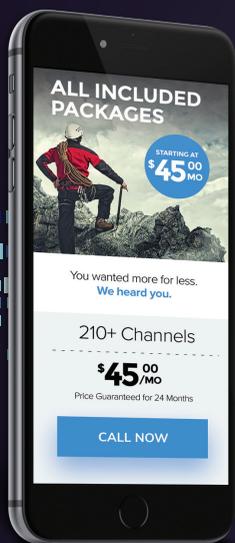
As a result, most digital marketers are stepping up their use of inbound calls as a marketing channel. Forrester found that 94 percent of marketers surveyed are either using, piloting or planning to use inbound calls as a customer marketing channel – third only behind email and mobile websites, tied with social media and ahead of display, search and desktop websites (see Table 1).

**Table 1: Which best describes your use of the following customer marketing channels?**



Source: *Pick Up the Phone: Your Best Customer Is On the Line*, Forrester Consulting

**Today's consumers have made mobile calls an integral part of their purchase journeys, as they seek more immediate gratification of their business information wants and needs.**



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## Use cases expand, AI drives more sophisticated approaches

Marketers are using call analytics platforms to identify the rich data and consumer insights hidden in the growing volume of inbound calls. Call analytics platforms are one of the few martech systems that can track both online and offline leads. Call tracking – following a call from source (i.e., website, click-to-call search or display ad) to sales representative (i.e., based on geographic location or product line) – has been a core use case. However, call analytics platforms now work for a number of marketing use cases, including the following:

- **Marketing attribution:** Call analytics provide flexible attribution across media channels, helping brands understand which digital media are driving phone calls. PPC marketers, in particular, have adopted call analytics to connect callers to specific campaigns and keywords, and track keywords to conversion events. The goal is to optimize bids for the keywords driving the most productive calls.
- **Personalization:** Call data can be combined with other martech system data to improve marketing personalization. Call analytics surface demographic data, product interest, buying stage and customer type. By pushing caller audiences into PPC, CRM or other marketing automation systems, marketers can optimize for the next right action.
- **Persona and lookalike audience building:** 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. Marketers can then build personas or lookalike audiences to use in campaign development and execution.
- **Retargeting:** Call recordings and transcriptions can also be used to retarget prospects based on the content – and insights derived – from their prior calls.
- **Sales enablement:** Call analytics platforms can score calls based on transcript analysis, to identify which callers merit callbacks, evaluate agent performance and learn which scripts or offers work best.

Many of these marketing applications are being fueled by vendor investments in artificial intelligence (AI) and machine learning, which are driving greater speed and accuracy into caller insights. Call analytics technology is evolving from providing basic analytics to providing “conversational intelligence” based on highly sophisticated algorithms that can extract and predict caller intent, and measure caller tone, sentiment and emotion. The goal is to enable brand marketers to increase marketing effectiveness and sales conversions.

## Marketing apps emerge for new technologies

New AI-driven technologies, including intelligent voice assistants, chatbots and messaging apps may also have a positive impact on the volume of mobile calls to businesses, although industry experts are still debating the marketing value of those calls. More than one in five US adults owned a smart speaker in 2018 – representing more than 53 million people, according to *The Smart Audio Report*, published by NPR and Edison Research. The report also found that the number of smart speakers in US households surpassed 118 million in 2018.

However, 70 percent of US consumers have never used voice assistants to research or purchase products, according to RichRelevance's second annual survey on how consumers search for and buy products online.

**Many of these marketing applications are being fueled by vendor investments in artificial intelligence (AI) and machine learning, which are driving greater speed and accuracy into caller insights.**

More than half of consumers still prefer to talk to a customer service agent (CSR) over a chatbot, according to PointSource's *2018 Artificial Intelligence and Chatbot Report*. Observers believe that the ease of placing orders through chatbots and apps will work best for local merchants, such as restaurants or personal services providers. This may also be true for intelligent voice assistants, as Google began testing Duplex through its Google Assistant in June 2018. Duplex enables users to tell Google Assistant to book reservations or check business hours for participating local restaurants. Google expanded Duplex from four US cities to 43 states in February 2019.

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 provides automated customer service and call intelligence capabilities designed to block spam and convert more business by ensuring that all calls are answered.

### Call data governance remains a priority

But even as brand marketers gain greater access and insight into individual consumer intent, call data privacy continues to be a priority, particularly for brands in the healthcare and financial services markets. Call analytics platform vendors must comply with Health Insurance Portability and Accountability (HIPAA) and Health Information Technology for Economic and Clinical Health (HITECH) regulations. Many vendors automatically redact personally identifiable information (PII) and consumer financial information from call recordings and transcripts to comply with 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 (formerly TRUSTe), a technology compliance and security company.

The European Union's (EU) General Data Protection Regulation (GDPR) went into effect in May 2018 and impacts all US marketers and data firms handling European data or serving customers in the EU. In June 2018, California legislators passed the California Consumer Privacy Act of 2018, which grants consumers more control over the use of their personal information online. The law goes into effect in January 2020, and defines personal information as anything that can be associated or linked with an individual or household.

These regulations are driving an expanded industry focus on data governance, with a view toward complying with new standards for the benefit of consumers, as well as marketers. Virtually all of the call analytics platform vendors profiled in this report are in compliance with GDPR and have clear policies for consumer consent on how their data is used.

### Consolidation marks mature, but rapidly evolving vendor market

Call analytics platform vendors are largely using external growth to keep pace with marketplace challenges and opportunities. In November 2018, publicly traded Marchex (NASDAQ:MCHX) acquired two competitive call analytics vendors: Telmetrics and Callcap. *(Editor's Note: At publication, the two acquired brands were still operating independently.)*

**More than half of consumers still prefer to talk to a customer service agent (CSR) over a chatbot, according to PointSource's 2018 Artificial Intelligence and Chatbot Report.**

Marchex purchased Telmetrics for \$13.1 million to expand the breadth of its voice and text solutions. By combining resources, Marchex executives expect to leverage machine learning and AI-based conversational data sets across a broader swath of channels. The company bought Callcap for \$35 million in cash and stock, with the goal of further increasing its conversational data set, as well as its access to the fast-growing SMB market – a Callcap strength.

DialogTech acquired Swydo, a leading European-based marketing dashboard and reporting tool, in January 2018. DialogTech executives stated that the addition will help unify reporting data, enabling clients to view call data alongside martech and adtech performance data within the DialogTech platform.

London-based iovox purchased WannaSpeak for an undisclosed sum in January 2019, to grow its core European market presence through WannaSpeak enterprise clients, including Axel Springer and Audi.

Other vendors, such as CallRail, sought to expand organically. In October 2018, CallRail secured \$15 million in credit from Square 1 Bank, a division of Pacific Western Bank, to fund the company's growth. About a year earlier, CallRail raised \$75 million in a second round of funding led by Leader's Fund and Sageview Capital.

## Selected Call Analytics M&A

### January 2019

**iovox:** Acquired WannaSpeak

### November 2018

**Marchex:** Acquired Telmetrics (\$13.1M) and Callcap (\$35M)

### October 2018

**CallRail:** Secured \$15M in debt financing from Square 1 Bank

### January 2018

**DialogTech:** Acquired Netherlands-based Swydo for an undisclosed amount

### September 2017

**CallRail:** Raised \$75M led by Leader's Fund and Sageview Capital

Source: Third Door Media

# 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 online marketing campaigns in order to track the source of a 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 analytics;
- Intelligent (machine learning-based) lead scoring and routing;
- Sales rep performance evaluation;
- Native social analytics integration;
- Data privacy compliance; and
- Martech ecosystem integration.

The following section discusses these features and the key considerations involved in choosing an enterprise call analytics platform (see Table 2).

## Multichannel attribution

Virtually 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 omnichannel 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 online and offline campaigns.

## AI-based analytics

Increasingly, artificial intelligence is being applied to inbound conversations to analyze spoken keywords or phrases for either 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 vendors are increasing their investments in AI to enable their analytics engines to use a variety of natural language processing (NLP) and machine-learning

**Virtually 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.**

Table 2: Selected call analytics platform capabilities

Vendor	Multichannel attribution	AI-based analytics <sup>1</sup>	Intelligent lead scoring and routing <sup>2</sup>	Sales rep performance evaluation	Native social analytics integration	Data privacy Compliance	Martech ecosystem integration	
							Native	API
AddSource	✓	✗	✓	✓	✗	GDPR	✗	✗
Callcap	✓	✓	✓	✓	✓	GDPR, HIPAA	✓	✓
CallRail	✓	✓	✓	✓	✗	GDPR, HIPAA, HITECH	✓	✓
CallSource	✓	✗	✓	✓	✓	NA	✓	✓
CallTrackingMetrics	✓	✓	✓	✓	✓	GDPR, HIPAA, HITECH, PCI DSS	✓	✓
Convirza	✓	✓	✓	✓	✗	HIPAA	✓	✓
DialogTech	✓	✓	✓	✓	✓	GDPR, HIPAA, HITECH	✓	✓
Infinity	✓	✓	✓	✗	✗	GDPR, HIPAA	✓	✓
iovox	✓	✓	✗	✗	✗	GDPR	✓	✓
Invoca	✓	✓	✓	✓	✓	GDPR, HIPAA	✓	✓
Marchex	✓	✓	✓	✓	✓	HIPAA	✓	✓
ResponseTap	✓	✓	✓	✗	✓	GDPR	✓	✓
Telmetrics	✓	✓	✓	✓	✓	GDPR, HIPAA, PCI DSS	✓	✓

<sup>1</sup>Used to analyze inbound call conversations for caller intent and sentiment.

<sup>2</sup>Uses AI or machine learning to automate lead scoring and routing.

Source: Third Door Media

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) that can influence call outcome. They can also be used post-call to feed CRM systems and trigger nurturing campaigns.

### **Intelligent call scoring and 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 (website, mobile device, search ad), geography, demographics (age, gender, income) or intent. Some of the tools used in 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 conversion and other qualifying events.

### **Sales rep performance evaluation**

Several of the call analytics platform vendors profiled in this report are rooted in sales training and evaluation – and use call recording tools to maximize efficiency in the call center and among sales staffs. Today, call analytics sales performance and evaluation tools use both human analysis and AI-based machine learning to provide scoring/grading systems, script optimization and real-time alerts that flag lost opportunities. Several vendors offer online sales training tools and classes, as well.

### **Native social analytics integration**

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

### **Data privacy compliance**

Call analytics platform vendors that serve clients in the healthcare industry must comply with HIPAA and HITECH regulations, and many automatically redact PII and consumer financial information from call recordings and transcripts to comply with PCI requirements. Businesses that generate inbound calls from European consumers must also comply with the European Union's GDPR, which was implemented in May 2018. These restrictions on data use impact all US marketers and data firms handling European data or serving customers in the EU.

### **Martech ecosystem integration**

Integrating call analytics data with third-party software systems has become essential to creating a unified view of callers, site and store visitors, prospects and customers. Call analytics vendors have expanded the number of native integrations available with martech and adtech solutions including SEO, PPC, DSP, CRM and marketing automation systems, as brands 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.

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

Most of the vendors profiled in this report also offer open application programming interfaces (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.

## Choosing an enterprise call analytics platform

### The benefits of using call analytics platforms

Call analytics play a vital role in establishing the relationship between online and offline marketing 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 accuracy of online/offline channel 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 systems provides the enterprise with a more complete view of each prospect and customer for more relevant, personalized marketing.
- **Marketing campaign optimization.** Inbound calls can be tracked to their marketing source at the keyword, campaign and channel levels, and followed through the conversion funnel to identify the most profitable sources. Campaigns can then be adjusted to focus on the sources that resulted in the highest quality phone leads.
- **More efficient marketing budget resource allocation.** More accurate attribution will result in marketing budget being more effectively allocated to the most profitable keywords, campaigns and channels based upon call tracking.
- **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 hold times.
- **Better sales performance.** Inbound calls can be recorded and analyzed to identify which agents and sales techniques close the most sales. Training can be provided to improve results, where necessary. Whisper messages also can be used to help agents customize their approach to provide them with known customer information during calls.

**Call analytics play a vital role in establishing the relationship between online and offline marketing channels, leading to more efficient marketing resource allocation and improved sales staff effectiveness.**

## 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 omnichannel 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 volume 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 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.

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

## 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 requires you to follow 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 questions as a guideline to determine the answers.

- 1. 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 qualify "considered purchase" decisions over the phone.
- 2. What is our process for analyzing phone conversations? What kind of data can we pull out of calls?** How accurate and sophisticated is your inbound phone data? Can you assess the quality of calls at every stage – pre-call, in-call and post-call? Call analytics platforms can provide superior depth of call tracking and analytical data to boost the bottom-line impact of your inbound phone channel.
- 3. What call analytics capabilities does our organization need?** Prioritize the available call analytics features based on your most pressing business needs. Do you need to get started with basic call tracking data? Or to send reports to your 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?

4. **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 skilled human resources in place, the platform can end up becoming an expensive reservoir of untapped data with unfulfilled potential to increase revenue and improve customer experiences with your brand.
5. **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 add-on or third-party consulting services to effectively use the platform.
6. **Can we successfully integrate a call analytics system with our existing martech 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 external vendors.
7. **What are our reporting needs? What information do 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 will drive better decisions and ultimately more revenue for your business.
8. **What is the total cost of ownership?** Enterprise call analytics platforms use on-demand pricing, meaning customers pay a monthly subscription price 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-on.
9. **How will we define success? What KPIs do we want to measure and what decisions will we make based on call analytics data?** You should 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.

**You should set your business goals for the call analytics platform in advance to be able to benchmark success later on.**

## Step Two: Identify and contact appropriate vendors

Once you have determined that enterprise call analytics software 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 vendors within a relatively short timeframe 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?

Use the following checklist as a guide to vendor questions on a range of topics:

### 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 relationship doesn't work out?
- ✓ 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?

**The most effective RFPs only request relevant information and provide ample information about your brand and its call analytics needs.**

**Call tracking and analytics**

- ✓ Do you record calls? How long are call recordings available to us?
- ✓ What is the breadth of your call tracking capabilities? Do you provide keyword- and session-based tracking?
- ✓ How do you provide in-call analytics that can help us score and optimize leads during the call? With artificial intelligence (AI) or machine learning? Or through manual (human) analysis?
- ✓ Do you offer whisper messages to announce caller sources or other valuable information to our agents before accepting the call?
- ✓ Does the platform use intelligent call scoring and routing to automatically route inbound calls based on caller location, business hours and/or staffing?
- ✓ Can call scores be automatically fed into rep performance assessments?
- ✓ How does the platform enable multichannel attribution?
- ✓ Does the platform enable other marketing automation capabilities, such as automatically generating online display or email nurturing campaigns?

**Data privacy and integration**

- ✓ Do you comply with HIPAA and PCI requirements? Is PII automatically redacted from transcripts and recordings?
- ✓ Are you GDPR compliant?
- ✓ 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?

**Infrastructure and 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 have been successfully processed?

**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 your platform be white labeled for agencies or multi-location marketers?
- ✓ Who will be the day-to-day contact?
- ✓ Who pays if your 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? 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 enterprise 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 move to an enterprise 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 set-up 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.

**Before deciding on a particular vendor, take the time to speak with several customer references, preferably individuals in a business similar to yours.**

## In summary

The ubiquity of the smartphone has created a renewed respect for the phone call as a key part of the customer journey. As consumers crisscross online and offline channels to research and make purchase decisions, enterprise marketers are looking for more sophisticated call analytics tools to help them efficiently collect, store, analyze and act upon caller data.

Yet every enterprise is unique and at a different level of maturity in its website, social, mobile and multichannel marketing efforts. It is important to carefully weigh current analytics needs against future goals when evaluating the return on call analytics investments. This market is developing rapidly, with many vendors investing heavily in AI and machine learning, as well as new features to expand the number of use cases for their solutions. A careful and comprehensive internal evaluation of business goals and capabilities is your first step in the decision-making process. The result can be a long-term, effective call analytics partnership that boosts both revenue and profit for your marketing organization. ■

## Vendor profiles

## **ADDSOURCE** Target customer

### AddSource

1001 SW 5th Ave.  
Portland, OR 97204  
(T) 866-524-6699  
[www.addsource.com](http://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

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

### Company overview

- Founded in 2011.
- 5 employees.
- Self-funded.
- Fully compliant with GDPR standards, keeping and processing data and transactions, according to requirements. 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 to 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: Identifies which media lead to inbound phone calls.
- Agency account management: Enables marketing agencies to present campaign results in a more efficient way, saving time on reports and communication.
- Pay-per-call ecosystem support: Provides advertisers with an ecosystem that can support pay per call with a UI, affiliate management and billing system.

## Vendor profiles

**o-ADDSOURCE** In-call analytics**AddSource**

1001 SW 5th Ave.  
Portland, OR 97204  
(T) 866-524-6699  
[www.addsource.com](http://www.addsource.com)

- 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.

**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.

**Third-party software 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

**Callcap**

125 N. Emporia, Suite 201  
 Wichita, KS 67202  
 (T) 866-362-9452  
[www.callcap.com](http://www.callcap.com)

**Key customers**

Cox Business  
 Mr. Cooper  
 University Hospitals  
 USA TODAY

**Key executives**

William Steinhoff, CEO  
 Deborah Autry, CFO  
 TJ Frevert, VP, Product and  
 Technology  
 Todd Miller, VP, Sales

**Target customer**

- Start-ups, enterprise brands, multi-location franchises, marketing agencies and Fortune 500 organizations across all verticals, including home services, professional services, manufacturing, healthcare, automotive, financial services and hospitality.

**Company overview**

- Founded in 2001.
- 40-plus employees.
- Acquired by Marchex in November 2018 for \$35M.
- Serves North America (US and Canada).
- HIPAA compliant.

**Product overview**

- Call tracking, recording, monitoring and text-enabled platform focused on sales, marketing, Voice of Customer (VOC) performance and ROI. Users can either call or text a tracking number.
- Online-to-offline conversion tracking using dynamic number insertion (DNI) to tie website visitors to phone calls.
  - Landing page performance and A/B testing.
- Advanced call routing by location, custom interactive voice response (IVR), *Follow Me* routing and more.
- Provides broadcast messaging and automated calls for appointment reminders and other scheduling apps.
- Phone call survey system enables businesses to analyze customer interactions in detail and determine customer sentiment.
- *Call Saver* product monitors phone conversations for a second chance at lost opportunities.
- *Protect+* product safeguards caller security by redacting sensitive financial information from call recordings to comply with regulations and payment card industry (PCI) requirements.
- *Reputation Score Blacklisting* automatically stops unwanted callers from connecting.

**Primary use cases**

- Online/offline attribution: *Webmatch* technology provides a deeper understanding of which keywords are driving phone calls.
- Call monitoring: *Callsaver* lost opportunity notifications enable win-back opportunities and enable marketers to understand campaign (ROI) performance.
- Two-way MMS/SMS functionality (NEXTms): Text-enables all tracking numbers to provide a feature-rich text strategy.

**In-call analytics**

- Utilizes human analysis to score calls within 15 minutes or less after call completion.
  - Trained analysts listen to recording, scoring calls by customizable conversation points. Analysts record necessary data and send out alerts, if necessary.
- Secret Shopper provides a random sample of phone calls to gauge customer sales representative (CSR) performance.
- Clients choose from a plethora of demographic caller data sets to connect target audiences and campaign performances.

## Vendor profiles

**Callcap**

125 N. Emporia, Suite 201  
 Wichita, KS 67202  
 (T) 866-362-9452  
[www.callcap.com](http://www.callcap.com)

**Social media/messaging**

- Text and call tracking numbers available.

**Marketing automation**

- Displays targeted on-screen offers when website visitors call.
- New leads inserted automatically into CRM via API.
- Revenue update API enables businesses to automate updates of per-call revenue earned, which feeds into ROI dashboards and reports.
- *Rapid Response* product enables businesses listed in shared lead systems to automatically place a phone call connecting the customer to the business instantly after the service request form is completed.

**Reporting**

- Reporting dashboard shows Caller ID demographics and allows users to listen to call recordings.
- Reporting at the visitor, keyword, campaign, channel and device levels.
- Customizable report builder enables users to choose from an analytics menu.
- Daily, weekly or monthly report delivery.
- Role-based account security.

**Third-party software integration**

- Native integration with Google Analytics, AdWords, DoubleClick, Domo Business Cloud, Kenshoo and Adobe Analytics to track online-to-offline phone call conversions for organic and paid search campaigns.
- API available to push or pull data into CRMs and marketing automation platforms.
- WordPress plug-in for easy management of dynamic numbers and web tracking.

**Pricing and support**

- Pricing starts at \$29/month and includes 10 phone numbers, 500 minutes and 200 texts.
  - Unlimited website user accounts.
- Volume discounts for phone numbers and add-on features available.
  - Call recording and web tracking included with each phone number.
  - Call monitoring, scorecards, surveys and broadcasts are additional.
- No annual contract required.
- Limited free trial available.
- 24/7 customer support via phone, email, text and live chat.

## Vendor profiles

# CallRail

## Target customer

- Agency and in-house marketers across all industries, for businesses of all sizes.

## CallRail

100 Peachtree Street, Suite 2700  
Atlanta, GA 30303  
(T) 866-331-6887  
[www.callrail.com](http://www.callrail.com)

## Key customers

AAMCO  
AdTaxi  
Doximity  
Logical Position  
Mitsubishi Electric  
SmartBug Media

## Key executives

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

## Company overview

- Founded in 2011.
- 190-plus employees.
- Raised \$75M in second round of funding in September of 2017, led by Leader's Fund and Sageview Capital.
- Raised \$15M in credit financing in October 2018 led by Square 1 Bank.
- GDPR compliant; privacy features meet HIPAA and HITECH requirements for healthcare marketing.

## Product overview

- Call tracking and analytics software designed to optimize advertising campaign performance, increase sales effectiveness and improve customer retention.
- Uses machine learning analytics, call meta-data and transcriptions to qualify leads.
- Provides call acquisition, behavior and conversion analysis through visual graphs, charts and downloadable call logs.
- Account Center for admin access to multiple accounts through one email address.
- Dynamic number insertion (DNI) automatically displays custom tracking phone numbers to targeted website audiences.
- Local Swap uses a web visitor's IP address to automatically display a number with an area code native to the visitor's locale to ensure trust and elicit calls.
- Whisper messages for lead qualification and context before a call begins.
- *Softphone* allows companies to make and receive customer calls directly from their web browsers.

## Primary use cases

- Inbound/outbound attribution: Connects marketing campaigns and channels to inbound phone calls, helping marketers optimize efforts for lead generation and prove ROI.
- Surface caller insights: Mine inbound and outbound call recordings and transcriptions for key insights, including: What questions are leads asking? What objections are they surfacing? How are reps performing on the phone?
- Smart call routing: Efficiently route inbound calls to specific departments or reps based on call criteria like dialing area code, dialing IP address, time of day and more.

## In-call analytics

- *CallScribe* tool automatically transcribes telephone conversations in real time. Uses both machine learning and human transcription.
- *Call Highlights* automatically surfaces conversation trends – keywords and phrases, common questions and more.

## Vendor profiles

# CallRail

## CallRail

100 Peachtree Street, Suite 2480  
Atlanta, GA 30303  
(T) 866-331-6887  
[www.callrail.com](http://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.
- *Forms* tool tracks online form submission from online sources, including website, social media and display.

### 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* enables 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 available in CallRail.
- 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 provides a breakdown of callers marked as good leads, visually illustrating lead flow.
- Granular reporting with all filters drop-down menu to apply multiple filters to activity dashboard and reports.
- Printable and PDF report functionality.
- White-label and co-branded reports available.

### Third-party software integrations

- Native integration with Google Analytics and AdWords; 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 DNI.
- More than 300 integrations available via Zapier.
- API for additional system connections to call tracking phone numbers.

### Pricing and support

- SaaS-based pricing starts at \$30/month for unlimited users; custom quotes for high-volume customers.
  - No set-up fees.
- 14-day free trials available.
- No annual contract required.
- White labeling, premium integrations and custom domain names available to agencies for \$130/month.
- Set up, email and phone support during business hours included in pricing.

## Vendor profiles

# CallSource®

**CallSource**

5601 Lindero Canyon Road,  
Suite 200  
Westlake Village, CA 91362  
(T) 877-225-5768  
[www.callsource.com](http://www.callsource.com)

**Key customers**

Champion Windows  
Chrysler  
Cox (DealerTrack)  
Ingersoll Rand (Trane, American Standard)  
Sonic Automotive Group

**Key executives**

Elliot Leiboff, COO  
Tim Gomoll, Chief Revenue Officer  
Jason Scinocca, CTO  
Indra Chitre, CFO

**Target customer**

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

**Company overview**

- Founded in 1991 as RentLine, a phone-based, real-estate rental marketplace.
- 200-plus employees.
- CallSource networks are firewall-protected and reside within CenturyLink server facilities in Burbank and Chicago. The facilities are SSAE 16/ISO 27001 certified.
  - Database content is encrypted and reporting access is password protected.
  - Call recordings are encrypted and credit card or social security numbers may optionally be automatically redacted.
  - All calls not manually deleted are automatically purged from the CallSource system after 30 days.

**Product overview**

- CallSource offers a variety of services to maximize advertising ROI. Solutions include call tracking, lead categorization and alerts for missed opportunities. 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.
  - *DealSaver*® 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 and call conversion rates by reviewing and grading sales calls based on specific criteria. Customized scoring is available.
  - *Call Coaching* uses recorded calls scored against CallSource's proprietary principles to build call handlers' skills and increase call-to-appointment rates.
  - *CS Reviews* uses real people to respond to online reviews for business owners to protect brand reputation using customized criteria.
  - *CallShield*® is a cloud-based fraud detection and prevention service that blocks telephone hacking and computer-generated robocalls.

**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 and proprietary tracking code.
- Reputation 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](http://www.callsource.com)

### In-call analytics

- Available through *Call Processing*® tool and focused on analyzing lead quality as well as rep performance, closing ratios and business performance benchmarked against vertical 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.

### Marketing automation

- *LeadScore*® reviews, sorts and filters out non-prospects from tracked calls. It identifies which calls are true prospects and determines the overall lead percentage of incoming 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. It documents which calls resulted in appointments versus calls that missed the opportunity to book a call.

### Reporting

- Call conversions, call handler performance, missed opportunities alerts, call recordings and marketing attribution from all advertising sources are accessible in one centralized dashboard. Actionable items are highlighted for quick reference.
- Customizable reports are created with dropdown and granular data.
- White-labeled or personalized reports are available to create, manage and download.
- Monthly owner summary reports are

sent to user inboxes to compare the business to the industry.

- *LeadMetrix*® uses patented technology and live analysis to report and analyze channel ROI and compare results against best practices across vertical industries.
  - Key metrics include cost per lead by ad source, as well as lead conversion rate by employee.
- *LeadScore*® reports include the number of actual leads per source and average agent time spent on sales calls.
- *DealSaver*® email alerts and mobile app reviews inbound calls and sends 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 technology to individually map visitor paths across websites, and through sessions, whether on a desktop or mobile device, to understand customers' online activity and purchasing intent.

### Third-party software 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.
- One-time set-up fees range from \$99-\$349.
- Free trials not available.
- Annual contract not required (discount is available for those who sign one).
- SaaS-based pricing available.
- White-label integrations available.
- Customer support and industry specialized dedicated Account Managers and business advisors.
- 24/7 after-hours support available outside of regular business hours.

## Vendor profiles


**CallTrackingMetrics**

877 Baltimore Annapolis Blvd.,  
Suite 207  
Severna Park, MD 21146  
(T) 888-249-5556  
[www.calltrackingmetrics.com](http://www.calltrackingmetrics.com)

**Key customers**

Addiction Campuses  
Neiman Marcus  
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 businesses, advertising/marketing agencies, addiction treatment centers, law offices, healthcare providers, education, insurance, home services, multi-location franchises and enterprise-level call centers.

**Company overview**

- Founded in 2008.
- 40 employees.
- Privately funded.
- HIPAA, HITECH and GDPR compliant.

**Product overview**

- All-in-one call tracking and contact center solution.
- Local/toll-free/international/vanity numbers available.
- Dynamic number insertion (DNI) and online/offline call tracking.
- Keyword-level marketing attribution for calls, texts and online forms.
- Voice analytics and automated transcriptions sent via email or text after each call.
- Advanced routing options, such as skill-based, scheduled, geographic-based, caller demographics and more.
- Contact center workflow optimization tools to customize and automate call flows.
- Call queuing for sequential routing by agent and interactive voice response (IVR) for on-call lead qualification.
- Whisper messages for announcing call recording or menu options to callers, and call sources to agents or reps.
- Fraud detection by monitoring call patterns and blocking spam calls.
- Bulk text messaging to send and receive messages from tracking numbers with auto responses and instant reporting.
- Softphone (a browser-based headset) interface includes full features of the call log, such as caller profile and marketing attribution data, inside the Softphone window.
- Virtual agent gauges caller wait time. Callers can also choose to receive a call back from an agent, and still hold their place in queue.

**Primary use cases**

- In-call analytics: Used by healthcare providers to match callers to insurance carriers and create actions around the call, i.e., sending notifications to management in a daily digest of how many callers mentioned the carriers, and pushing caller details to an auto dialer for nurture campaigns.
- In-call analytics: Used by digital agencies to mine calls for specific words around buyer intent. *Keyword Spotting* tool to measure calls that meet specific criteria for conversion, e.g. if a caller mentions 'schedule an appointment' and speaks with an agent for more than 120 seconds.
- Automated triggers for missed opportunities: Clients handling high touch/intent, and high average order value (AOV) calls can set triggers to push missed calls to *Auto Dialer* for call backs. *Auto Dialer* can set call frequency by minute, hour or day. Additional *Auto Dialers* can be built to nurture customer segments by uploading CSV files or setting additional triggers for nurturing campaigns.

## Vendor profiles

 **CallTrackingMetrics**
**CallTrackingMetrics**

877 Baltimore Annapolis Blvd.,  
Suite 207  
Severna Park, MD 21146  
(T) 888-249-5556  
[www.calltrackingmetrics.com](http://www.calltrackingmetrics.com)

**In-call analytics**

- On-call keyword detection to identify and set keywords and phrases to tag and categorize calls for follow up.
- Post-call surveys enable agents to enter caller information post-call to populate third-party analytics platforms and feed into platform reporting on incoming call quality.
- System can be set to automatically detect the presence of particular word patterns on calls and trigger particular actions if they are present.

**Social media/messaging**

- Tracks and optimizes social media campaign performance.
  - Users can view calls as conversions in Facebook.
- Identifies caller online activity and social media source pages.
- Logs and reports on text message campaigns, with the ability to schedule auto-responses.
- Scores text messages as conversions and attributes a sale amount.
- Sends appointment reminders with text messaging triggers.

**Marketing automation**

- *FormReactor* (click-to-call forms) syncs forms from customer's site with vendor's call log and tracks forms (ad, campaign, keyword level data) alongside of calls. Agents can respond immediately after a form fill.
- Ability to create custom sources, including social media sites and specific ad campaigns.
- Automated call tagging lets agents attach information, such as revenue generated by a call, to inbound leads.
- Automated call scoring to rate calls based on quality, conversions or custom metrics. Users set scoring criteria manually and the system automatically appends the appropriate call score.

**Reporting**

- Real-time dashboard identifies callers, call sources and call volume by channel,

and sales performance by agent.

- ROI reports provide cost per call, conversion rates, call volume, revenue generated and ROI in each media channel, with recommendations to improve revenue.
- Mobile apps enable clients to access reports via iPhone and Android devices.
- Calls matched to website visitors and back to ad click, campaign and keyword sources.
- *Manager Mode* dashboard for call center agent management and performance.

**Third-party software integration**

- Native integration with Google Analytics, Google Ads, Google Data Studio and Google Forms; Salesforce, Microsoft Dynamics 365, HubSpot and Marketo; Shopify; Zendesk; AMP; WordPress; Facebook and Bing Ads.
- API integration with Zapier (app automation).

**Pricing and support**

- Pricing ranges from \$19/month to \$299/month, and is based on usage volume (numbers and minutes).
  - Enterprise pricing is customized.
- 14-day free trial available.
- White-label and reseller tools available with the ability to mark-up pricing and charge clients directly.
- Standard onboarding includes access to weekly webinars, calls with a dedicated team member, free academy training classes and a comprehensive online support center with product guides and video tutorials.
- API support resources including weekly webinar Q&A sessions and technical documentation for developers using the API.
- Standard technical support includes email, phone and chat.
- Add-on premium support includes dedicated support engineer, 24/7 coverage, response-time guarantees, custom implementation packages and blocks of hours with lead engineers.

## Vendor profiles

**Convirza**

405 East 12450 South  
Building 2, Suite k  
Draper, UT 84020  
(T) 855-889-3939  
[www.convirza.com](http://www.convirza.com)

**Key customers**

Belle Tire  
Caterpillar  
Gannett  
Money Mailer  
Overhead Door  
Realtor.com

**Key executives**

Jeremiah Wilson, CEO &  
Founder  
John-Paul Scoville, COO

**Target customer**

- SMBs to enterprises and their agencies in the retail, automotive, healthcare, home improvement, travel & hospitality, financial services and real estate industries.

**Company overview**

- Founded as LogMyCalls in 2001; rebranded as Convirza in May 2015.
- 82 employees.
- Acquired CallSource's call tracking, media and publishing division in 2015 in a transaction that included selling its phone coaching and training division.
- Raised nearly \$25M in venture financing, including a Series B led by undisclosed investors.
- Additional office in Agoura Hills, CA.
- *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, as well as Conversation Analytics® for speech analytics.
  - Indefinite access to call recordings.
- 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/indicators developed with AI and more than 50,000 hours of data science research analyzing calls. Examples include: Lead score, promotion mention, sales inquiry, initial purchase, appointment set, missed opportunity, politeness, phone etiquette, etc.
- 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 including 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 that provides automated, adaptive and predictive spam protection in real-time for inbound phone calls.

**Primary use cases**

- Track, analyze and optimize calls: Determines which marketing channels are most effective to better allocate budget spend. Improves understanding of multi-step customer journeys. Matches campaigns with tracking numbers, including local, true 800, toll-free and vanity numbers.
- Detect conversions: Uses AI-driven *Conversation Analytics*® technology to identify lead quality, score sales skills to identify strengths and areas for improvement and monitor agent performance with *Instant Insights*. Also detects whether calls convert by phone number, campaign or channel, and offers 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

## Vendor profiles

**Convirza**

405 East 12450 South  
Building 2, Suite L  
Draper, UT 84029  
(T) 855-889-3939  
[www.convirza.com](http://www.convirza.com)

client value, and faster call analysis with scheduled reports.

**In-call analytics**

- *Conversation Analytics*® combines AI and natural language speech recognition technology to analyze phone calls.
  - Uses more than 1 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 75 standard and over 300 custom 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.
- Programmatically allows call data to be 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.
  - Identify high-performing keywords and ads.
  - Closed-loop attribution combines online and offline customer journeys.
- 50-plus 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.

**Third-party software 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.
- Custom-priced plan offers upgrades such as app customization, white labeling and advanced telephony.

**Pricing and support**

- SaaS-based pricing plans range from Starter (\$29/month) to Professional (\$199/month and up) to Advanced

## Vendor profiles



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[www.convirza.com](http://www.convirza.com)

custom packages for agency and enterprise needs.

- Pricing includes onboarding, phone and email support, and a personal Account Manager (Advanced plans only).
- 30-day free trial.
- No annual contract required.
- Unlimited users.
- 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**

300 W. Adams, Suite 900  
Chicago, IL 60606  
(T) 877-295-5100  
[www.dialogtech.com](http://www.dialogtech.com)

**Key customers**

Brookdale  
CDW  
Comfort Keepers  
Sylvan Learning  
Terminix  
Travel Guard

**Key executives**

Doug Kofoid, CEO  
Leon Chism, CTO  
Viji Davis, SVP Marketing  
David Rush, Chief Revenue Officer

**Target customer**

- Marketers at enterprises, multi-location brands and digital agencies working with considered or urgent purchase industries, including financial services, insurance, automotive, healthcare, travel & hospitality, retail and home services.

**Company overview**

- Founded in January 2005 as Ifbyphone.
- Acquired Mongoose Metrics in September 2014 and rebranded combined company as DialogTech in March 2015.
- Acquired marketing dashboard provider Swydo in January 2018.
- 200 employees in North America and Europe.
- \$60M in total venture funding.
- Additional offices in the Netherlands and in Cleveland, OH.
- HIPAA, HITECH and GDPR compliant.

**Product overview**

- DialogTech connects calls and conversations to the customer journey. It leverages AI to derive insights that transform conversations into structured first-party data sets that can be leveraged across marketing activities. This is done through four products:
  - *SourceIQ*<sup>TM</sup>: Provides granular call attribution to measure how digital channels, ads, search keywords, webpages and offline marketing drive calls and customers while capturing critical caller information, including demographics, geography and time of day.
  - *ExperienceHub*<sup>TM</sup>: Personalizes the caller experience with a self-serve, built-in call routing and interactive voice response (IVR) technology that qualifies callers and connects them with the best agent or location.
  - *DialogAnalytics*<sup>TM</sup>: Analyzes conversations with any agent or location using AI and machine learning to measure lead quality, caller disposition, agent performance, call outcome and more.
  - *IntegrationStudio*<sup>TM</sup>: Integrates call data with CRMs, martech tools, digital ad platforms and contact center solutions to provide a holistic view of marketing performance, segment callers into audiences for retargeting and lookalikes based on their conversations, and enable marketers to make smarter optimizations to increase revenue and decrease CPA.
- Dynamic Number Insertion (DNI) technology includes multi-location support; support for local, toll-free and international numbers; and algorithms for keyword- and session-level call attribution using fewer numbers.
- Automatically routes each caller to the best location or agent based on real-time data and arms agents with insights on callers before they start the call.
- Marketers can build their own custom IVRs in minutes to qualify and assist callers.
- Automatically blocks spam calls with built-in machine-learning anti-spam technology.

**Primary use cases**

- Audience building: AI analyzes consumer conversations at scale to create a first-party data set that puts each caller into the best audiences for search, social and programmatic campaigns.
- Attribution and optimization: Users can understand how marketing campaigns drive calls that convert to customers and use that data to make smarter decisions to improve results.
- Caller experience personalization: Automatically routes callers based on their profile,

## Vendor profiles

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intent and online interactions to the best location or agent to convert them to customers.

**In-call analytics**

- *DialogAnalytics*<sup>TM</sup> records and transcribes every inbound call to every location and uses AI algorithms tailored to each client to score conversations for caller intent, product/service interest, sales agent performance and call outcomes. Full access to transcripts enables marketers to perform keyword spotting and trend analysis activities for calls from any time period to be used as inputs into future planning and buying activities.

**Social media/messaging**

- Attributes calls and conversations for all search, display, video and social media platforms, including paid ads and organic posts on Google Ads, Bing, Facebook, Instagram, Twitter, LinkedIn, Pinterest and YouTube.

**Marketing automation**

- Integrates call attribution data with Google Ads, Bing, Facebook Ads Manager and bid management platforms to view and optimize call conversions alongside online conversions.
- Retargets past callers with relevant digital ads, excludes callers from seeing irrelevant ads and builds lookalike audiences based on best callers.
- Attributes calls to pages from organic search to refine and enhance SEO efforts based on what is driving offline engagement.
- Leverages AI models to uncover trends and popular questions from conversations to be leveraged in optimizing website and ad messaging, SEO and voice search results, and conversion rates.

**Reporting**

- Real-time, customizable reports and dashboards on KPIs, call sources, keywords, call volumes and durations, caller geography, IVR responses, conversion rates and more.
- AI-based reports that score calls to each location for caller intent, sales agent interactions and call outcomes.
- Email alerts notify marketers or franchise owners of location-specific call issues -- including hot phone leads that don't convert or CX issues.
- Visualizations and dashboards of online and call data from Google Analytics, Google Ads, Bing, Facebook, LinkedIn, Twitter and more for omnichannel reporting.
- Schedules reports to automatically deliver data to team members, franchisees or agency clients and receive alerts when KPIs are at risk.

**Third-party software integration**

- Native integration with ad platforms (Google Ads, Bing, Facebook); 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, IgnitionOne, Adobe Advertising Cloud); CRMs (Salesforce, Microsoft Dynamics 365, Urban Science); contact center management (Genesys, Amazon Connect); website optimization (Adobe Target, Optimizely, Instapage); and dashboard tools (Swydo, TapClicks).
- Integrates with LiveRamp to pass call data to any LiveRamp-enabled marketing platform.
- APIs available for custom integrations with other marketing and sales solutions.

## Vendor profiles



**DialogTech**

300 W. Adams, Suite 900  
Chicago, IL 60606  
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[www.dialogtech.com](http://www.dialogtech.com)

### Pricing and support

- SaaS-based pricing for enterprise-scale solutions starts at \$1,000 per month and is based upon customer needs and call volume.
- Includes onboarding, training, and phone and email support during business hours.
- Annual and multi-year contract options.
- Strategic consulting focused on

measuring and optimizing marketing ROI available.

- Free trials not available, but pilot programs are offered to prove the value of the service.
- Managed services available for a fee.

## Vendor profiles



### Infinity

The Shard, 28th floor  
32 London Bridge St.  
London, UK SE1 9SG  
(T) 44 208 712 9531  
[www.infinity.co](http://www.infinity.co)

### US Headquarters

250 South President St.,  
Suite 10  
Baltimore, MD 21202  
(T) 888-896-2715

### Key customers

Charter/Spectrum  
Direct Energy  
Laureate  
Mazda  
Rackspace  
TripAdvisor

### Key executives

Paul Walsh, CEO  
Warren Newbert, CFO

### 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.
- 115 employees.
- Global services available in 75-plus countries.
- Additional offices in San Francisco and Reigate, Surrey, UK.
- GDPR and HIPAA compliant, offering practical guides on how to manage security and tools to ensure compliance in both the US and EU.

### 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.
- Enterprise use cases in marketing, operations and sales.
- Fully encrypted session initiation protocol (SIP) calls for inbound and outbound calls across multiple major markets.

### Primary use cases

- Optimize marketing spend: Reduces cost per acquisition and identifies revenue-generating opportunities.
- Improve customer experience: Improves the understanding of user journeys to lead to more valuable calls and conversions.
- Unlock conversation insights: *Conversation Analytics* suite segments calls based on outcome, enhances competitor intelligence and improves 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 comments.
  - End-of-call rating allows agents to use phone keypad selections (customizable) to rate the value of each call.

## Vendor profiles

**Infinity**

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32 London Bridge St.  
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[www.infinity.co](http://www.infinity.co)

**US Headquarters**

250 South President St.,  
Suite 10  
Baltimore, MD 21202  
(T) 888-896-2715

**Social media/messaging**

- Tracks inbound calls 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 journey
- 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 specific, custom conversions to take place 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.

**Third-party software integration**

- Native integration with 35 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

(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. Various packages to select from 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 want to analyze their call data further.
  - Enterprise: Offering with further volume discounting and custom integrations (if required). Solutions, training and project management teams work alongside a dedicated Customer Success Manager.
  - Agency: Gives agencies the ability to provide call tracking services to their clients that will help measure their campaigns, monthly rolling agreements to enable agencies to add/remove clients.
- Free trials available on request.
- Annual contracts not required.
- All customers receive 24/7 support.
- Training videos, knowledge base and webinars available to all; customized training programs for Enterprises.

## Vendor profiles

**Invoca**

419 State St.  
 Santa Barbara, CA 93101  
 (T) 877-375-3978  
[www.invoca.com](http://www.invoca.com)

**Key customers**

DISH Network  
 University Hospitals  
 Mutual of Omaha  
 SunTrust Bank  
 3 Day Blinds  
 Vivint Smart Home

**Key executives**

Gregg Johnson, CEO  
 Colin Kelley,  
 Co-founder and CTO  
 Ben Sullivan, SVP Sales  
 Julia Stead, VP Marketing

**Target customer**

- Enterprise and mid-market B2C brands, as well as agencies and performance marketers serving industries that sell high-consideration products and services, including financial services, insurance, travel, telecommunications, healthcare and home services.

**Company overview**

- Founded in May 2008 as RingRevenue.
- 177 employees.
- Raised \$60M in five rounds of venture funding.
- Additional offices in San Francisco, CA and Lone Tree, CO.
- HIPAA and GDPR compliant; PCI DSS certified.

**Product overview**

- Cloud-based Invoca offers an AI-powered call tracking and analytics solution to help marketers get conversion reporting and campaign attribution from inbound phone calls. Features include:
  - Real-time, closed-loop attribution to understand which marketing efforts drive calls, which customers are calling and the outcome of those calls.
  - Automatic call routing to send callers to the right agent and provide agents with insights to deliver a more personalized call experience.
  - Call recording that automatically redacts sensitive information.
  - 100% call uptime.
  - Audience expansion tools to reach new audiences with lookalike modeling and custom audiences across paid search, social and display, and through Invoca's certified pay-per-call partners.

**Primary use cases**

- Marketing campaign optimization: Tracks inbound calls on a 1-to-1 consumer-level with dynamic number insertion (DNI) for toll-free and local numbers. Measures and attributes calls and conversions to the marketing campaigns, keywords and ad placements that drove them in real time. Integrates first- or third-party data to enhance the call record with additional offline information (e.g. CRM, demographic data). Classifies calls, detect conversions and segment callers in real time with AI-powered predictive models and rules-based analytics, or import offline conversion data via file upload or API.
- Enhanced customer interactions: Orchestrates the customer journey with call-based audiences. Triggers follow-up emails based on call outcomes. Ensures subsequent display, social, email or website experiences are consistent with the last phone conversation.
- Personalized call experiences: Automatically routes calls to the right agent with data from the customer's digital journey. Informs call center agents with pre-call data like what webpage or offer they clicked on before calling, in addition to demographic information to provide a seamless, personalized experience.

## Vendor profiles

**Invoca**

419 State St.  
 Santa Barbara, CA 93101  
 (T) 877-375-3978  
[www.invoca.com](http://www.invoca.com)

**In-call analytics**

- *Invoca Signal AI* technology uses machine-learning predictive algorithms to analyze live phone conversations to understand caller intent and call outcomes.
  - Natural Language Processing (NLP) provides machine learning-based speech recognition.
- *Signal AI* is available to marketers in two ways:
  - Custom predictive models can be trained using a customer's own call recordings to establish conversion outcomes tailored to unique business needs.
  - Pre-trained models let marketers take advantage of more than 20 out-of-the-box call outcomes specific to a range of industries.
- Rule-based analytics allow users to create custom rules to classify calls using data such as call duration, spoken keywords, caller demographics, campaign information and more.
  - Keyword spotting used to identify caller interest in high-value product lines or services.
- Full visibility into prediction accuracy rates, plus the ability to import additional call data to refine and improve algorithm accuracy.
- Provides real-time insights from hundreds of data points on each call.

**Social media/messaging**

- Native integration with Facebook advertising to provide insights into Facebook campaigns, ad sets and ads driving customers to call and convert offline. Invoca is a Facebook Marketing Partner.
- Instagram integration enables marketers to target customers who want to have a conversation before buying.

**Marketing automation**

- Insights from each caller and conversation are shared with marketing stack platforms to ensure subsequent display, social, email or website experiences are consistent with the last phone conversation.
- Invoca is an Adobe Premier Partner, enabling customers to utilize call data across the Adobe Experience Cloud (including *Adobe Analytics*, *Audience Manager*, *Target* and *Ad Cloud*).
- Salesforce Marketing Cloud integration delivers call analytics across *Journey Builder*, *Audience Builder*, *Email Studio* and *Data Extensions*.

**Reporting**

- Real-time dashboards and custom summary reports provided through Invoca's call tracking platform and native integrations with Adobe Experience Cloud, Salesforce Marketing Cloud and Google Analytics.
- Reports provide insights into which campaigns are driving calls, including call volume, call duration, top campaigns, keywords, conversation outcomes and call conversion rates.
  - Users can toggle between campaigns, interact with more than 60,000 publishers and drill down into each campaign with a variety of different views depending on needs or goals.

**Third-party software integration**

- Ecosystem of more than 30 technology partners to import and export Invoca call analytics data into existing technology stacks.
- Native integrations with Adobe Experience Cloud, Facebook/Instagram, Google Ads/YouTube, Google Analytics, Bing Ads, and Salesforce Sales and Marketing Clouds.
- APIs, bulk data transfers and webhooks for integrations with additional marketing technology platforms including Kenshoo, Marin Software,

## Vendor profiles



**Invoca**

419 State St.  
Santa Barbara, CA 93101  
(T) 877-375-3978  
[www.invoca.com](http://www.invoca.com)

Microsoft Dynamics 365, Optimizely, and Google Search Ads 360 and Display & Video 360.

- Digital telephony integration with any session initiation protocol (SIP) platform provider, including Five9 and Genesys.

### Pricing and support

- Pricing includes an annual software license fee starting at \$12,000, plus usage fees.
- Annual contracts required.
- No free trials.

- 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 included for an additional fee.
  - Add-on professional services provide campaign and process design services, and custom partner integrations.

## Vendor profiles



**iovox**  
 99C Talbot Rd.  
 Notting Hill  
 London, UK W11 2AT  
 (T) 44 2070991070

**US Headquarters**  
 55 La Goma St.  
 Mill Valley, CA 94941  
 (T) 888-408-4128  
[www.iovox.com](http://www.iovox.com)

### Key customers

AutoTrader UK  
 British Telecom  
 Le Centrale  
 Pizza Express  
 Web.com  
 Zoopla

### Key executives

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

### Target customer

- Enterprise and SMB brands in all verticals.

### Company overview

- Founded in 2007.
- Nearly 50 employees.
- Privately held. Octopus Ventures and Columbia Lake Partners are the primary institutional investors.
- Additional offices in San Francisco, Paris and Sydney.
- GDPR compliant.

### Product overview

- Offers a combination of inbound call tracking and value-added services to enterprise accounts.
  - Inbound options include both static and dynamic call tracking (source and session based).
- A new, two-way mobile call tracking solution allows SMBs to track and organize calls made from mobile phones.
  - Adds context to every call, enabling tags, flags for follow up, notes and transcriptions (for Android only), and integration with CRM systems such as Zoho CRM.
- Provides a web portal login for clients seeking a turnkey solution to measure campaign effectiveness.
- 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, web call back, spam filters and blocking, SMS tracking and CRM integration.
- Uses artificial intelligence (AI) and natural language processing (NLP) for an advanced phone booking solution that integrates with restaurant table management platforms to interact with the calling party and book reservations.

### 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 ("this lead provided by XYZ").
- 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: 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.

## Vendor profiles



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 (T) 888-408-4128  
[www.iovox.com](http://www.iovox.com)

### 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.

### 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 RESTful API enables users to tie into a variety of marketing automation systems.

### 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.

### Third-party software integration

- Open RESTful API that allows customers to integrate iovox call tracking into off-the-shelf or proprietary workflow tools, such as CRM or marketing automation.
- Mobile solution includes built-in 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 is 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.
- Phone and email-based support during business hours (where client is based) for clients under contract, with 24-hour escalation options.
  - Non-contract customers (i.e., mobile) offered email support during business hours.

## Vendor profiles

# Marchex<sup>®</sup>

## Marchex

520 Pike Street, Suite 2000  
Seattle, WA 98101  
(T) 800-840-1012  
[www.marchex.com](http://www.marchex.com)

## Key customers

CDK Global  
DexYP  
GM  
Intercontinental Hotels Group  
Meineke Car Care Centers  
State Farm

## Key executives

Mike Arends, CFO  
Russell Horowitz,  
Executive Director  
Mark Corley, SVP, Analytics  
Jose Piñero, VP,  
Call Marketplace

## Target customer

- Enterprise brands, multi-location businesses and agencies with clients in a range of verticals, including automotive, financial services, communications, home services, healthcare, professional services, and the travel & hospitality industries.

## Company overview

- Founded in 2003; went public in March 2004 (NASDAQ: MCHX).
- 300 employees.
- Acquired both Telmetrics (\$13.1M) and Callcap (\$35M) in November 2018.
- Owns 30-plus technology patents.
- Privacy practices independently certified by TrustArc (formerly TRUSTe).
- Certified compliance with the EU-U.S. Privacy Shield Framework.

## Product overview

- Provides two complementary product lines: *Marchex Call Analytics* and *Marchex Call Marketplace*.
- *Marchex Call Analytics* measures and attributes sales and consumer intent for inbound calls made from mobile and digital media.
- Includes Dynamic Number Insertion (DNI) and multi-level interactive voice response (IVR).
  - *Clean Call*<sup>®</sup> patented technology identifies and blocks more than 90% of phone calls from telemarketers, auto-dialers and spam callers by detecting unwanted call patterns.
    - ◆ Advanced fraud prevention also prevents robocalls from reaching a business by analyzing call audio in real time to detect known robocall call signatures, and is immune to Caller ID spoofing.
  - Multi-layered information security program includes encryption of sensitive customer data in transit and at rest, access controls and 24/7 live system monitoring by the Marchex Systems Operation Center.
  - Supports automatic redaction of spoken credit card numbers and other potentially sensitive numeric information from both audio recordings and transcripts.
- *Marchex Call Marketplace* is a performance-based pay-per-call ad network.
  - Connects high-intent prospects to companies by providing full-service lead acquisition campaigns backed by analytics and a dedicated team.
  - Provides single point of contact and full-service pay-per-call campaign management for companies that want to increase lead volume while saving time to focus on other marketing efforts.

## Primary use cases

- Media attribution and optimization: Proves marketing campaigns are driving calls and improving marketing ROI through inbound acquisition, media attribution and bid management optimization.
- Audience targeting: Enables building high propensity audience segments for Facebook, Google and Adobe modeled after client's best customers, based on omnichannel conversion data.
- Sales acceleration through improved call handling: Increases sales velocity by providing operational and sales insights that help brands reduce failed call rates and train customer representatives to better discover and understand customer intent and needs.

## Vendor profiles

# Marchex<sup>®</sup>

## Marchex

520 Pike Street, Suite 2000  
Seattle, WA 98101  
(T) 800-840-1012  
[www.marchex.com](http://www.marchex.com)

### In-call analytics

- Speech analytics processes over 140 million consumer-to-business conversations.
- 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 artificial intelligence (AI) and machine-learning models.
- Agent performance tracked by automated "secret shopper" program for every call, identifying top performing agents and best practices.

### Social media/messaging

- Direct call attribution from social media ads and organic placements, including Facebook and Twitter.
- Supports Facebook audience creation, segmentation, modeling, media planning, distribution and personalized user experiences.
- Creates lookalike audiences based on best customers and/or suppressed audiences as needed.
- Identifies audiences influenced by social media ad campaigns and delivers those insights into the social media platforms.
- Provides increased visibility into which social campaigns online are driving conversions offline.

### Marketing automation

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

### Reporting

- Call analytics data and insights visualized in intuitive, color-coded reporting 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.
- View-through conversion metric for inbound calls to enable digital marketers to measure the ROI of programmatic display advertising campaigns.
  - Integrates with DoubleClick Campaign Manager.

### Third-party software integration

- Productized integrations with analytics platforms, including Google Analytics and Adobe Analytics; paid search/bid management platforms, including Kenshoo, Marin, Google Search Ads 360, Acquisio and Adobe Advertising Cloud; CRM platforms, including Salesforce Sales Cloud; and audience targeting solutions, including Facebook Custom Audiences.
- APIs for integration with data management platforms (DMPs), CRMs and other martech systems.

### Pricing and support

- *Marchex Call Analytics*: per-call pricing model.
  - Product packages:
    - ◆ Essential Edition offers basic call tracking.
    - ◆ Conversation Edition offers AI-powered speech analytics for marketing optimization, sales acceleration and customer experience improvement. Enterprise Edition also available.
    - ◆ Media Edition offers omnichannel analytics for marketing performance and optimization. Enterprise edition also available.
    - ◆ Ultimate Edition includes all edition features, as well as Facebook audience targeting.
  - Annual and pay-as-you-go contract

## Vendor profiles

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- options available.
- Selected product packages include Success Assurance, which includes an industry-specific customer success team, onboarding, training and assistance with campaign management support.
- Standard email and phone support provided during regular business hours (6am-5pm PST).
- Add-on Premier support available to Enterprise Edition and Ultimate Edition customers, including access to 24/7/365 support.

- *Marchex Call Marketplace:* Performance-based per-call pricing model.
  - Flexible contract terms.
  - Pay-per-call campaigns can be launched within 7 days.
  - Ongoing campaign optimization and support by assigned full-service account management and publisher management personnel.

## Vendor profiles



### ResponseTap Limited

7th Floor, Building 8  
Exchange Quay  
Salford Quays  
Manchester, UK M5 3EJ  
(T) (0)808 250 8229

### US Headquarters

79 Madison Ave.  
New York, NY 10016  
[www.responsetap.com](http://www.responsetap.com)

### Key customers

DealerOn  
Hiscox  
Intuit  
Jiffy Lube  
Mount Sinai Medical Center  
Travelpod

### Key executives

Ross Fobian, CEO  
and Co-founder  
Richard Hamnett, CTO  
and Co-founder  
Steve Gardner, CFO

### Target customer

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

### Company overview

- Founded in June 2008 as AdInsight; rebranded as ResponseTap in 2013.
- 80-plus employees.
- 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 related to how the changes work.

### 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.
- Agent optimization: Present agents with online web behavior in real time to help them have an informed conversation and close sales quicker.
- Marketing optimization: Understand which marketing campaigns lead to highest value calls to inform future activity.

### In-call analytics

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

### Social media/messaging

- Dedicated phone numbers can be added to social media ads.
- Clickthroughs from social channels are automatically tracked and campaigns optimized accordingly.

### 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 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).

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### 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 all volume, sales revenue and profit.
- AdWords 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.

### Third-party software integration

- Offers native integration with the following martech systems:
  - Personalization: Qubit, Visual Website Optimizer, Tealium, Adobe Target, Content Square, 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 and Infusionsoft, plus others such as Microsoft Dynamics 360 via automation tools.
- Call center: Cisco Finesse, Amazon Connect, Twilio and Avaya Breeze
- Email: InfusionSoft and HubSpot.

### Pricing and support

- Pricing starts between \$270-\$2,620/month, based on requirements.
- Fixed-price, annual SaaS license.
- Annual contracts required.
- No free trials.
- Phone and email support included (4am-8pm EST).
- More advanced reporting, integrations and insight (data science) services are available for an additional fee.

## Vendor profiles

**Telmetrics**

2645 Skymark Ave.  
Mississauga, ONT  
L4W 5L6 Canada  
(T) 800-255-3224  
[www.telmetrics.com](http://www.telmetrics.com)

**Key customers**

Autotrader  
Rollins Orkin  
Web.com  
YellowPages  
Yelp

**Key executives**

Andrew Osmak,  
President & CEO  
Rami Michael, CTO  
Catherine Caplice,  
VP, Customer Success

**Target customers**

- Enterprise-level search providers, multi-location brands and franchises, digital directory publishers and digital marketing agencies across all industries.

**Company overview**

- Founded in 1990.
- 60-plus employees.
- A wholly owned subsidiary of Marchex, Inc. after being acquired in November 2018 for \$13M.
- HIPAA and GDPR compliant with PCI DSS redaction.

**Product overview**

- Call and conversation analytics platform that measures call response to advertising, as well as text, web chat, in-app chat, emails, form fills and other online and offline channels.
- Local and toll-free text enabled phone numbers available in North America.
  - Combines session initiation protocol (SIP) and native public switched telephone network (PSTN) platforms for 100% local number coverage.
- Scalable and configurable dynamic number insertion (DNI) with dedicated number pools.
- 24/7 real-time number provisioning via RESTful API or UI for local, national, international and mobile call tracking; self-serve or full-service options available.
- Dual-channel high-fidelity call recordings to enable separation of audio for transcription and interpretation.
- Ad whisper messages play a branded message to the business receiving the call before connecting.
- Patented telemarketer *Call Block*™ feature continuously searches and eliminates nuisance calls.
- Calls per second (CPS) and concurrent call support for enterprises with high-volume requirements.
- Call management/routing capabilities include time of day, follow me (forwards calls from one termination number to the next), caller segmentation, geography and zip code.
- Proprietary custom attribution solution provides keyword-level attribution without number substitution.

**Primary use cases**

- Custom DNI: A major US chain decreased cost per lead by 50 percent.
- Textable tracking numbers: A major North American home services brand increased response to its Google paid ads by over 40 percent.
- AI-driven automated call scoring: Over 6,000 minutes/month in time given back to Sales Ops for a major marketing solutions provider.

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**In-call analytics**

- Machine-generated, time-aligned text representation of a call record file. Transcriptions are provided in the Telmetrics UI and API, with the caller and agent portions of the conversation identified.
- Facilitates the customization of speech recognition in generating transcriptions and call scoring or call record audio files.
- AI-based automatic identification of words and phrases of interest within call transcriptions.
- Call scoring based on transcripts derived from dual-channel recordings along with machine-learning interpretation models.
  - Four predefined dispositions: lead, non-lead, current customer or voicemail.
  - Custom dispositions, such as vertical leads/non-leads, appointment and reservation bookings, and product and service inquiries available.

**Social media/messaging**

- Social advertising attribution technology and Social DNI provides tools and metrics to evaluate and optimize performance of social media ad campaigns.
- Native Facebook integration enables reporting on social ads within the Facebook campaign manager environment.
- Exports caller data to remarket on Google and Facebook and expand reach through lookalike audiences.
- *SmartNumber Service*<sup>™</sup> enables texting on new and existing lines (local and toll free).
  - Scalable solution designed for enterprise-level texting volumes.
- SMS-to-chat capabilities and mobile-to-mobile messaging.
- Simple text-based auto-responder capabilities.
- Convert calls into mobile opt-in lists with proprietary service that launches

texts after voice calls with branded messaging and permission-based opt-ins suited for CRM integrations.

**Marketing automation**

- Native and API integrations to push paid search call response data directly into bid management, marketing automation, dashboard analytics and CRM platforms, including Salesforce and HubSpot.

**Reporting**

- Reporting delivered through RESTful API or Telmetrics dashboard.
  - API provides data points on call details, call recordings, text conversations, DNI session and associated metadata.
- Real-time reporting of call events and details via webhooks.
- Key reports include call detail records, call recording and text conversations.
  - Call detail reports include pre-call metrics, real-time call tracking analytics (including voice mail detection) and post-call results (including call scoring and keyword spotting).
- Measures performance, lead attribution, program optimization and platform monetization.
- Pay-per-call reporting and support.

**Third-party software integration**

- Native and API integrations with DoubleClick (Search and Campaign Manager), Google Analytics, Google AdWords, Kenshoo, Acquisio, Salesforce, HubSpot, Marin, TapClicks and Adobe Experience Cloud.
- API integrations with chat platforms, including Slack, LiveChat and Contact at Once.

**Pricing and support**

- Customized SaaS-based pricing based on usage (call tracking numbers and minutes) and value-added features.

## Vendor profiles

telmetrics 

**Telmetrics**

2645 Skymark Ave.  
Mississauga, ONT  
L4W 5L6 Canada  
(T) 800-255-3224  
[www.telmetrics.com](http://www.telmetrics.com)

- All call tracking, analytics, fraud prevention and spam-blocking tools, as well as onboarding (system integrations and training) and API use included in pricing.
- Annual contracts not required.
- Free trials available.
- 24/7 phone and email support included.
- Value-add services provided by Market Analytics team, including data analysis and predictive insights.
- Dedicated Account Management team to support onboarding, and partner in add-on customer servicing and project needs.

# Resources

## Websites

DigitalMarketingDepot.com  
MarketingLand.com  
MarTechToday.com  
SearchEngineLand.com  
Thelsa.org

## Articles

*"Google bringing call intelligence and automation to SMBs, for \$39 per month,"* by Greg Sterling, Contributing Editor, Search Engine Land; VP, Strategy and Insights, Local Search Association. Published May 1, 2019.

*"Google brings its Duplex AI restaurant booking assistant to 43 states,"* by Brian Heater, Hardware Editor, TechCrunch. Published March 2019.

*"How call tracking is becoming conversational intelligence,"* by Greg Sterling, Contributing Editor, Search Engine Land; VP, Strategy and Insights, Local Search Association. Published March 22, 2019.

*"How voice search will change digital marketing – for the better,"* by Purna Virji, Senior Manager, Global Engagement, Microsoft. Published May 2016.

*"What the numbers tell us about the current voice search opportunity,"* by Andy Taylor, Associate Director of Research, Merkle. Published April 2019.

## Whitepapers

*Artificial Intelligence Transforms Marketing Performance Measurement*, by Tina Moffett. Published by Forrester, November 2018.

## Research Reports

*2018 Artificial Intelligence and Chatbot Report*. Published by PointSource, a Globant Company, January 2018.

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

*Local Business Websites and Google My Business Comparison Report*. Published by BrightLocal, May 2019.

*Pick Up The Phone: Your Best Customer Is on the Line*. Published by Forrester Consulting (commissioned by Marchex), July 2017.

*The Forrester New Wave™: AI-Fueled Speech Analytics Solutions, Q2 2018*, by Ian Jacobs and Kjell Carlsson, Ph.D. Published by Forrester, June 2018.

*The Smart Audio Report*. Published by NPR and Edison Research, December 2018.