



# Calls are the New Clicks

# How B2B Marketers can Tap into the Power of the Phone

# Table of Contents

## Bonus Materials

### BEST PRACTICES LIST

12 Ways to Get More Inbound Calls

### QUIZ

Assess Your Inbound Call Maturity

#### Part 1

## 3 Why the Phone Matters to Marketers

Introduction: The New Differentiator for Marketers

Beware the Blind Spot in the Customer Journey

Why Inbound Calls Matter

The Nagging "Other Revenue" Bucket

Bad Data Leads to Bad Marketing Decisions

What's Holding Marketers Back?

#### Part 2

## 14 How to Impact the Bottom Line with Call Intelligence

Close the Marketing Attribution Loop

Automate, Streamline and Measure Inbound Phone Calls

Customer Spotlight: Q&A with CAKE

Bridging the Gap Between Sales and Marketing

#### Part 3

## 20 Best Practices for Adding Call Intelligence to the Marketing Mix

Getting Buy-in for Call Intelligence

Integrating with Existing Digital Tools

How to Choose the Right Solution

Conclusion: Complete Your Marketing with Inbound Calls



## **Part 1**

# Why the Phone Matters to Marketers

## Introduction

# The New Differentiator for Marketers



As a B2B marketer, you’re charged with making decisions about how to generate, qualify and route leads to the sales team.

Your ultimate goal is to drive leads that convert to revenue. Unfortunately, potential customers tend to take complex, multichannel journeys on their way to making a purchase, often leaving marketers like yourself in the dark.

The good news is that a wealth of new digital marketing technologies put the power in your hands to track and analyze prospective buyers—even anonymous ones—at a level that was previously thought impossible. Armed with insights about prospects’ concerns, goals, behaviors and channel preferences, you can deliver better content and more relevant offers early in the decision-making process. Moreover, by taking advantage of powerful technology like marketing automation, you can better and more efficiently engage, nurture and route leads to the sales team.

The bad news is that if you’re like most marketers, you’re probably also overlooking an incredibly valuable source of leads: inbound calls. If you look at the calls your business receives, you’re likely to notice that they convert at a higher rate and higher average order value than other leads. Most B2B companies have no strategy to drive inbound calls, however, and many B2B companies don’t even include a phone number on their landing pages or websites. In their rush to drive and measure digital engagement, many B2B marketers have lost sight of other critical channels for customer engagement, such as the phone.

As a result, B2B marketers who don’t develop a strategy for driving inbound calls find themselves missing a huge opportunity to optimize for the highest-quality type of lead. According to BIA/Kelsey, 10–30% of all calls to businesses are high-quality and lead-based. In fact, BIA/Kelsey found that 61% of businesses rate their inbound phone calls as an “excellent” source of leads—a higher number than any other inbound lead source.



**10–30% of all calls** to businesses are high-quality and lead-based.



In fact, BIA/Kelsey found that **61% of businesses** rate their inbound phone calls as an “excellent” source of leads—a higher number than any other inbound lead source.



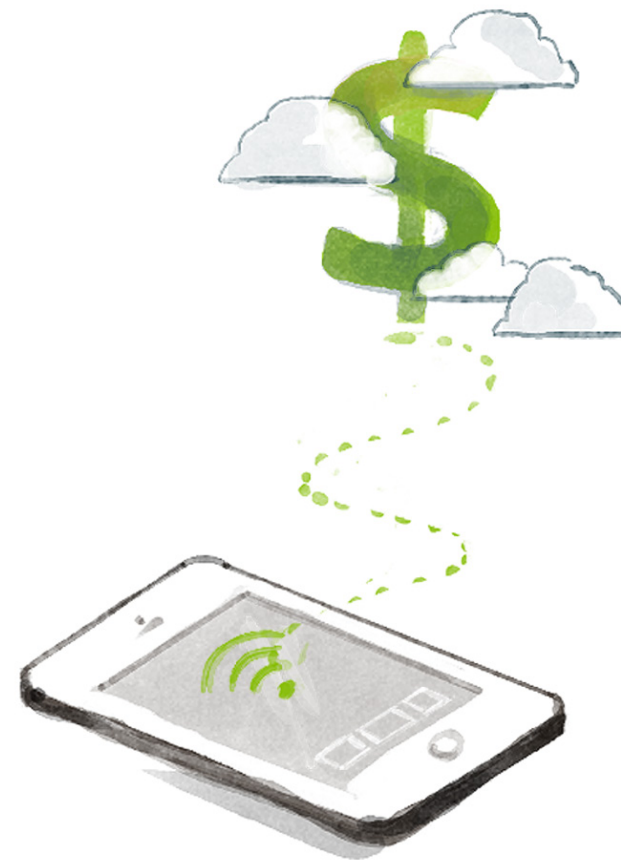
To make matters worse, if you’re not tracking and optimizing for inbound calls, you could be making bad decisions (such as where to invest marketing dollars) that actually result in fewer leads.

**A CLICK, LIKE OR SHARE IS JUST ONE STOP ON THE WINDING PATH TO PURCHASE.**

But there’s a solution to accurately capturing that journey and optimizing the multichannel path to purchase: add call intelligence to your toolkit. Call intelligence closes the loop between marketing and sales by giving you insight and control on the quality of your inbound calls and by helping you better qualify prospects across online, offline and mobile marketing channels.

**Think of it as marketing automation for inbound phone calls, empowering you to optimize your inbound call channel and get quality buyers talking to your company.**

## Without call intelligence, you are:



- **Unable to see the entire path to purchase, making it impossible to accurately measure marketing performance**
- **Not getting credit for the inbound calls your marketing initiatives are driving**
- **Unable to make educated decisions to drive more of those high-quality leads**

With call intelligence, you can have the same data and metrics for offline interactions and online engagements. And you can easily add this valuable data to the tools you already use, such as your marketing automation and CRM systems.



**This e-book explores all these issues and explains how you can actually drive more high-quality leads simply by integrating call intelligence into your digital marketing strategy.**

# Beware the Blind Spot in the Customer Journey

**A**ccording to Lori Wizzo of Forrester, the Internet has been fantastic for lead gen—generating such a high volume at a low cost that there have been few concerns about low conversions. The reality, however, is that B2B marketers find themselves dealing with low-value or unqualified leads in the early stages of the funnel. In fact, the idea of the traditional marketing funnel is dead and has been replaced by a “purchase loop.” Instead of funneling prospects downward and assuming we know the right time for a one-on-one conversation, marketers need to empower customers to make connections how and when they want.

That’s where marketing automation comes into play—helping to manage, score and nurture these early stage leads and route the best ones to sales. It’s easy for you to think you’re

adeptly managing leads by taking advantage of marketing automation, but the reality is that you’re still operating in the dark without taking inbound calls into consideration.

If you’re like most B2B marketers, you aren’t thinking about calls. This blind spot in the customer journey has driven most marketers into an “out of sight, out of mind” mentality, and this inability to measure performance has resulted in most marketers all but ignoring the inbound call channel. Sure, you may feature one or two phone numbers in your content and campaigns. For the most part, though, most marketers likely treat this as a checklist item instead of an opportunity to optimize their marketing performance.



**60% of marketers** do not know which campaigns drive inbound calls



**It’s imperative for marketers to start taking as much care with inbound call traffic as they do with online traffic.**

The truth is: Even if you’re ahead of the curve and recognize the strategic importance of inbound calls, you likely haven’t found a way to integrate call intelligence with your other digital marketing efforts. Given that you probably wear a great number of hats at work, this is understandable. You’ve probably chosen to focus your efforts on digital.

This digital focus isn’t a bad thing. Digital marketing is great for driving awareness and interest and for generating demand, but it can’t be the exclusive focus. Thinking digital marketing is the only way to drive leads is misguided. Don’t forget: Most people on the path to purchase bounce offline, online and across channels.

*“Great marketing is about creating two-way conversations with your audience, and just because you reach your customers on digital doesn’t mean your audience wants to reach you back the same way. We live in a world where customers have diverse preferences in the way they want to interact with businesses and where they expect you to give them options, including the ability to call. More importantly, the call channel offers benefits [that] digital just can’t. The breadth and speed of engaging with a prospect is deeper in a live conversation than via any other form of communication.”*

 **David Cain**  
VP OF MARKETING 



B2B companies are on track to spend **more than \$105 million** on mobile marketing in 2014 according to Forrester. Without meaningful engagement from prospects, however, those dollars will be wasted.



Marketers are seeing prospects and customers use their mobile phones to respond to digital and offline campaigns in every part of the buying process, contributing to an increase in the **tens of billions of inbound calls** to businesses annually.

# Why Inbound Calls Matter



Research from BIA/Kelsey found that consumers are **10x more likely** to make purchases if they place a call rather than make click.

**W**hile it's easy in today's digital world to think that all interactions with prospects occur via email or online, the B2B path to purchase almost always involves a phone call. In fact, serious prospects and customers with a strong intent to buy want to call—and these calls are high-quality leads.

Consider the fact that buyers are conducting more and more research online (and via their mobile phones). According to Forrester, B2B buyers do not engage with a sales rep until they are at least 2/3 of the way through their decision-making process. Companies in some industries don't involve their sales reps until prospects are 90% of the way into the process. When these informed buyers reach out to vendors, they want a conversation, not a prompt to fill out a Web form.

Because prospects are waiting until so late in their decision-making process to connect with sales, it's more important than ever for companies to make it easy to quickly get in touch with a salesperson. This is demonstrated by the fact that salespeople who talk to prospects on the phone immediately convert those leads at significantly higher rates than sales reps who contact prospects who fill out Web forms.

For this reason, taking a data-driven approach to managing inbound calls is critical, and you've already done this effectively for your other marketing channels. For example, you know exactly which content asset, paid search ad or video spurred a prospect to the next step in the path to purchase. But how do you make that connection when the next step is a phone call?

*“When buyers reach out to you, they're more likely to move onto the next stage in the buying cycle—and more quickly than other buyers. After all, they've either already done their research and are close to a buying decision, or they are relying on you to educate them and lead them down the path to purchase.”*



**Miles Bergstrom**

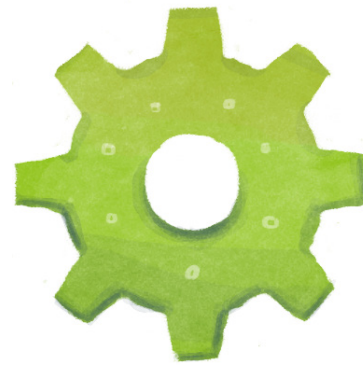
INBOUND CALL COORDINATOR

**HubSpot**



The good news is that, with the right technology, you can apply the same analytical approach to phone calls as you do to your digital channels. In fact, not only can you track what ultimately drove customers to call; a single phone call can also reveal in-depth insights that an online engagement just can’t rival.

**Inbound calls have the potential to reveal:**



**Areas to better tailor messaging and the buyer experience to customer needs**



**Top customer questions and objections**



**Demographic details like geographic location**



**360° view of the buyers' path to purchase**

---

Without collecting data on inbound calls, you are working with incomplete data. As a result, you could be abandoning effective campaigns (such as search marketing ads) that don't seem to be converting leads, when in reality, those leads are simply converting offline (via the phone). Think of the customers you could be leaving on the table! **It's time to start measuring performance in terms of clicks *and* calls.**

# The Nagging “Other Revenue” Bucket



It wasn't that long ago that digital channels like email weren't an accepted means of prospecting. We've all heard the phrase “dialing for dollars.” Although our engagement with prospects has evolved tremendously over the last 20 years, it was the need to track offline conversations with customers and prospects that originally led to the birth of CRM systems. The focus was on tracking engagement at the phone call level.

Over time, CRM systems evolved to track emails, opportunities, pipeline and more. In fact, CRM became the system of record for every interaction that a prospect or customer has with an organization. CRM is the central source of truth that many companies depend on to fuel their customer engagement across every channel—whether it's sales, support or marketing.

But CRM has had a huge hole in the system from the beginning. After a phone call with a prospect or customer, the salesperson must log basic information about what happened during that call. What you'll find when you talk with most

salespeople, however, is that they make their money on the phone—not entering notes into their CRM system. As a result, we've all seen the notes that look something like: “Good call. Sounded interested. Will follow up next week to talk about X, Y and Z.” When you go back to analyze what happened during those calls, you're often left with more questions than answers.

Further complicating matters for marketers is the fact that salespeople most likely won't immediately consider determining what drove a prospect to call; they understandably jump to questions about the opportunity and usually only take the time to ask what drove a person to call after they've secured the information that's most immediately relevant to them. Even when organizations diligently enforce questions about where prospects originated, the answer usually isn't very useful in making decisions. After all, who really remembers the keywords they used in a search, the ad they saw, or the subject line of the last email they opened? It's no wonder so many calls are logged without lead sourcing or simply as an “inbound call.”

There's no question marketers love analytics. The problem is that **most B2B marketers suffer from a huge blind spot** in their marketing automation and CRM data. They're completely in the dark when online campaigns lead to phone calls.

In truth, classifying an inbound call as a lead source is a misnomer. It’s like saying the “submit” button on your landing page form is a lead source. A call is a conversion point. Whether a Web search, display ad, email newsletter, white paper or even a billboard along the highway, the source is what triggered the prospect to call. The fact this person ultimately decided to pick up the phone and call you directly is a strong indicator of their interest in making a purchase, but it’s not very helpful in making decisions regarding where you should invest your marketing dollars.

**EMAIL, SOCIAL, VIDEO, SEARCH AND CONTENT ARE GREAT OPPORTUNITIES TO EDUCATE, ENGAGE AND ENTERTAIN AUDIENCES— BUT THEY DON’T REPLACE ONE-ON-ONE INTERACTIONS.**

The key point is that, without knowing what prompted someone to call, you can’t make plans to attract more potential buyers (and eliminate the “tire kickers” in the process). In other words, without recording what actually attracted these leads (as opposed to recording *how* they reached out to you), you are left blind for driving more (or fewer) of those calls.

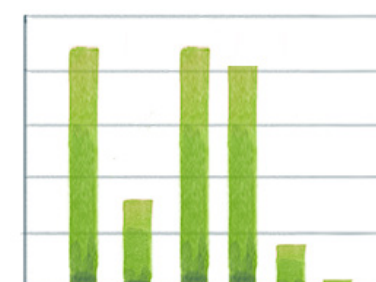
If the only information you had for making decisions about where to focus your marketing efforts was that someone clicked a button on your website, delivering value to your company would prove impossible. So, why think this way about inbound phone calls?

Perhaps you’re thinking you already track phone calls because you’re placing different phone numbers for individual campaigns on billboards, landing pages and brochures. This is nothing new, however.

Without insight into the entire path to purchase, you’re faced with a number of obstacles that aren’t much better than that dreaded “other revenue” bucket.



**You can’t measure the true ROI of marketing campaigns because you’re missing offline conversions.**



**Your data is skewed and overemphasizes the touches after prospects have already made up their minds.**



**You can’t get a holistic picture of how prospects engage online and offline over the phone.**

Until this point, we’ve only discussed your ability to understand why customers make their purchases. But what about the calls you receive from customers who aren’t yet ready to make a purchase? Wouldn’t it be valuable to tailor your lead nurturing and retargeting campaigns

using information about why specific customers called and what took place during those calls? If a prospects calls early on but isn’t ready to move forward with sales, having that data synced with marketing automation and retargeting would be incredibly valuable so that you can follow up with the appropriate message.

# Bad Data Leads to Bad Marketing Decisions

**P**erhaps you’re thinking you’ve done okay so far without paying attention to inbound calls. But the only thing worse than no data is bad data. Without accurate and complete data about your prospects and customers, you’re very likely making misguided decisions about your marketing strategy and tactics.

So what does an example of one of these misguided decisions look like?

Let’s take a look at how you’re bidding on keywords. You probably bid on a set of keywords, then use metrics like click-through rate and conversion rate to determine which words to invest in and which to bid less on. This works great when customers purchase online or fill out a lead form, but what happens when they browse your site, reach the point of conversion, and then pick up the phone and call? Can you tell if they made a purchase? What decision would you make about that keyword if people continually clicked through but never purchased?

Unless you understand whether or not keyword ads are driving inbound calls, you can’t intelligently decide whether to continue or kill these ads. Marketers get bad information,

and use it to make a decision that opens the door for a competitor to come in and pick up the slack.

Or perhaps you see via your Web analytics that someone appears to be a serious buyer based on the frequency and length of their visits to your site. On their last visit, however, they abandoned a lead form. Wanting to encourage further interaction, you send that person an email with links to information that may help with the purchase decision. You might even send a discount to incentivize the purchase. What you didn’t know was that this person actually called your sales team to ask some final questions before making the purchase over the phone. Now this customer wonders what’s going on behind the scenes at your company, since employees clearly don’t have a single view into company prospects and customers. This customer might even call back to ask for the discount you offered over email—costing you money instead of making you money.

These are just a few examples of the costly decisions you are likely making without insight into the impact of inbound calls.



At HubSpot, inbound calls convert at a **15x higher rate** than other lead types.

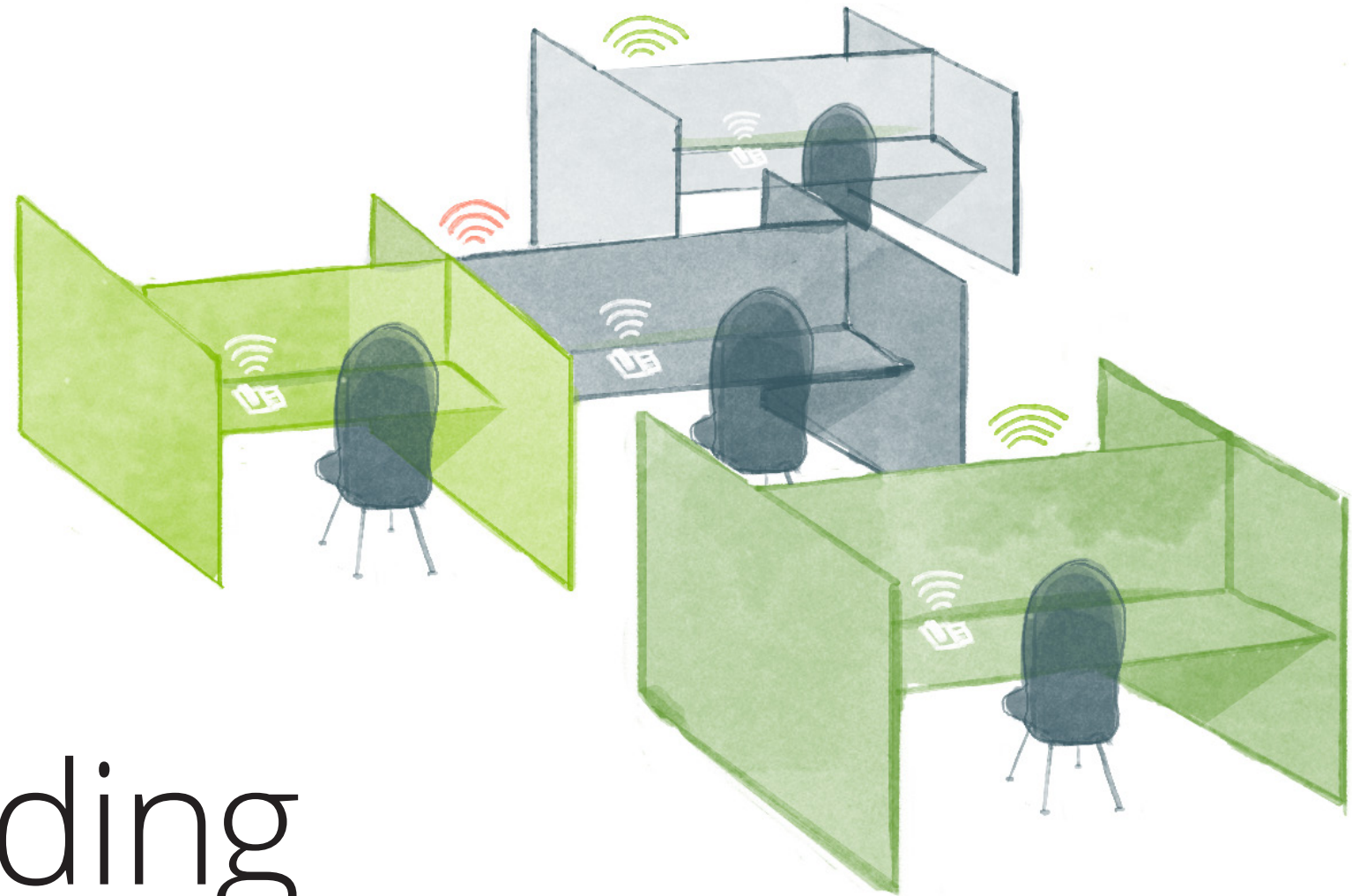
*“Consumers who used to do search on desktops are quickly moving to mobile devices. As a result, marketers need to track inbound calls for a full demographic understanding of prospects, effective campaign routing, and smart budgeting.”*

 **Abid Chaudhry**

SENIOR DIRECTOR OF INDUSTRY  
STRATEGY AND INSIGHT

**BIA** Kelsey





# What’s Holding Marketers Back?

**P**erhaps you’re ignoring inbound calls because you think it’s too difficult to do anything about it. Perhaps you envision needing to deploy a new phone infrastructure, figuring out how to tie the data back to your marketing automation and CRM systems, and developing reports about calls. It’s a very manual and tedious process, and you simply don’t have the time or capabilities.

The good news is that with Invoca you can get access to all the previously mentioned call data, in an easy-to-consume

format similar to Google Analytics, Optimizely, or any of the marketing automation platforms you might use. Just like you use tools for insight into what’s happening on your email campaigns and other areas of marketing, you can use a tool that tells you what drives people to pick up the phone and call.

It might be tempting to settle for a basic call tracking tool, but tread with caution. You want the ability to track and optimize inbound calls, in lockstep with your other digital marketing systems.

Marketers are spending a ton of money on marketing automation and CRM solutions, only to have an incomplete ROI picture.





## **Part 2**

# How to Impact the Bottom Line with Call Intelligence

# Close the Marketing Attribution Loop

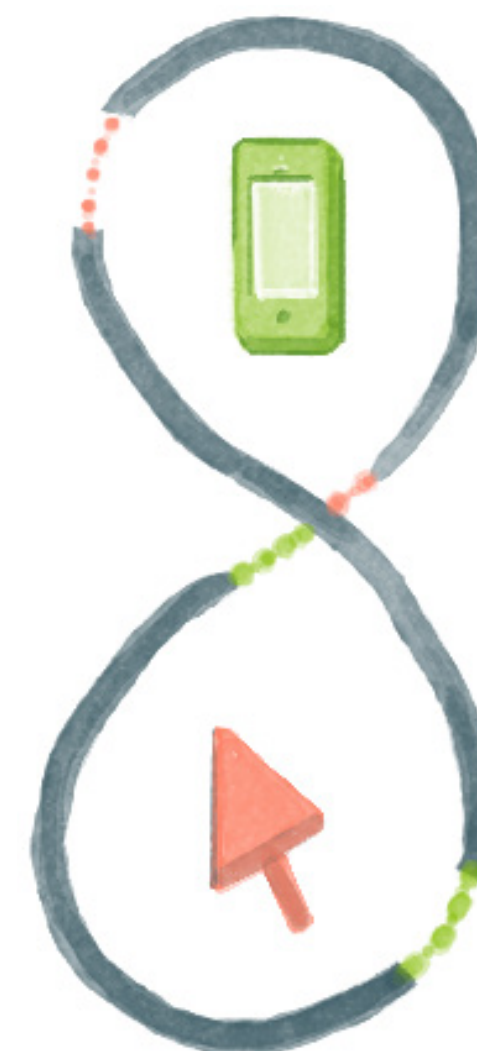
**C**all intelligence is the missing data link, enabling a 360° view of prospects and customers and the ability to drive more high-quality leads.

**CALL INTELLIGENCE GIVES YOU THE VISIBILITY INTO OFFLINE INTERACTIONS SO YOU CAN ACTUALLY SEE THE PATH TO PURCHASE FROM ONLINE ENGAGEMENT TO PHONE CALL TO SALE.**

The best call intelligence solution allows you to analyze calls in real time and take smart actions as a result. For example, you can tie the prompt for a call to an offer,

identify if the person is calling from a mobile phone, and match the phone number to records in your CRM system. If the caller is an existing customer, you can automatically route the call to the right person within your organization.

Properly routing calls and using in-call lead scoring to filter and determine location, device type and ultimately sales-readiness can offer valuable insights into customer behaviors and preferences. These insights are invaluable when you must justify your budget, need to make smart spending decisions, and want to know how best to optimize creative and campaign strategies.



Call intelligence closes the gap, tying calls to online behavior and giving you an accurate picture of your customers' paths to purchase.

Once the call is done, the ideal solution can feed the call data into your CRM and marketing automation systems to kick off workflows. For instance, it could determine that the call was from a VIP customer, lasted 2 minutes and included keywords “credit card” and “upgrade.”

Your CRM system could then automatically route that caller into the appropriate nurture program. You could also analyze data in aggregate for decision-making, such as “Which keywords am I bidding through Google AdWords that are driving people to pick up the phone?” Or you could see that callers mentioned a certain competitor in the majority of calls that ended in lost opportunities or that your sales reps hit on certain value propositions on calls that resulted in wins.

**In turn, you could address new competition in your marketing materials and educate your sales team on the best positioning.**

Driving inbound phone calls from mobile search, emails, content campaigns and your website gives you the power to:



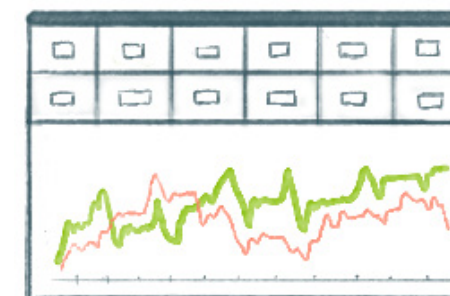
**Engage with prospects the moment they're interested.**



**Squash objections and answer questions with detailed and personalized responses.**



**Save sales reps from chasing down Web form leads.**



**Gather key data to better understand buyer behavior and marketing performance.**

# Automate, Streamline and Measure Inbound Phone Calls

**B**y treating inbound calls like any other leads, you can take your marketing to new heights. Here are just a few examples of how:

## Boost revenues, reduce costs

Calls are more expensive to manage than emails or Web forms because someone has to answer each one. When someone calls, you don't know if it's a time-waster or a valuable lead. With call intelligence, however, you can analyze calls in real time to gauge a prospect's strength or weakness. You can route promising prospects to sales and all others to your phone tree or IVR system—bringing more money in the door, while cutting the costs to handle calls that ultimately go nowhere.

## Optimize the path to purchase

With call intelligence, you can analyze phone calls at scale to understand what buyers and sales reps are saying. In turn, you can adjust messaging as needed and make sure your sales reps are using the right messaging.

## Facilitate a better customer experience

Sometimes buyers want to pick up the phone—especially for complex, expensive and/or customizable products or services. To best serve their needs, make your phone number easy to find. With call intelligence in your back pocket, you can do just that and track phone calls the same way you track clicks. That means you can feature your phone number prominently along the path to purchase and route inbound calls intelligently and dynamically, all to deliver a more personalized and positive buying experience.

*“Effective call campaigns drive pipeline acceleration because you:*

- *Get more responses by offering the call option.*
- *Drive more high-quality, fast-mover responses, since those who call are typically more serious than those who respond online.*
- *Allow for real-time interactive conversations, which give your sales team the opportunity to do what they do best: position your offerings well and ‘sell.’”*

 **David Cain**  
VP OF MARKETING 

## Customer Spotlight



# Q&A WITH CAKE

**Jeff McCollum**  
FOUNDER OF CAKE



**Q** Why do inbound calls matter to CAKE?

**A** CAKE is a tracking, attribution and optimization platform. We help advertisers track how they spend their digital marketing dollars across multiple channels—online and offline. It's about looking at cost associated with every touchpoint across the entire customer journey. Before working with Invoca, we were only able to provide attribution for digital channels like email and social, even though CAKE's customers drove literally thousands of calls through advertisements. Being able to provide attribution for these inbound phone calls has opened up an entirely new revenue stream for us.

**Q** Your customers benefit from Invoca, but so does CAKE. How do you use Invoca internally?

**A** We are a software as a service company, with an emphasis on "service." We have more than 450 clients and provide support to our clients via the phone. So, as the leader of the company, I want to understand where my dollars are being allocated within the support organization. Until we implemented Invoca, I was flying blind. I just knew the phone rang a lot. We're now giving each of our clients their own unique phone number, so I can track exactly who's calling, how frequently and for how long. More importantly, we use the Invoca for Salesforce app, so are able to easily port all of that data into Salesforce.com and view it in custom dashboards. This has been a game changer for my support organization.

**Q** What advice would you give to marketers who aren't yet thinking about inbound calls?

**A** I would encourage marketers to take the time to understand how inbound calls fit into their business and to be thoughtful about how to optimize for more of these calls. When you're evaluating solutions, try not to solve for the short term. Inbound calls are here to stay, so think about how calls fit into the entire customer journey and how call intelligence technology will integrate with your existing systems.

**Q** As we look toward 2015, what do you think will be top of mind for CMOs?

**A** Although attribution isn't a new topic for marketers, I think it continues to be an important one. There's been significant advances in tracking the digital path to purchase, yet most marketers are still left in the dark when a prospect goes offline. CMOs are being held accountable for every dollar spent on digital marketing, so actually knowing which banner ad drove an inbound phone call, for example, is huge. It gives them insight into where they're spending money across the entire customer journey.



# Bridging the Gap Between Sales and Marketing

**C**all intelligence also helps bring sales and marketing into alignment. Like many B2B marketers, you probably feel endless pressure to deliver more leads.

But the reality is that, when one of your campaigns is the source of an inbound call, you're likely delivering more leads than you and your sales counterparts realize. With call intelligence, you can finally attribute these calls to your campaigns, showing sales reps everything that you're doing to fill the pipeline.

On top of that, you can address the negative impact on close rate when sales reps take their time to return prospects' calls. According to research by InsideSales.com, the odds of contacting a lead are 100x higher after 5 minutes than those

contacted after 30 minutes, and the odds of qualifying a lead are 21x higher after 5 minutes versus 30 minutes later. In HubSpot's experience, inbound calls convert at 15x the rate of other leads. It's no wonder salespeople call the phone "the money line." But your sales reps must jump on these calls.

Forget trying to gather extensive contact info via Web forms and having reps try to repeatedly make contact via phone and email. Instead, focus on driving inbound calls that are automatically qualified by the call intelligence software. Doing so enables prospective buyers to connect with your sales reps without delay.



*"An inbound call program strengthens the bond between sales and marketing because it encourages the teams to work together to determine how to increase the quality of leads and speed at which they close."*

 **Miles Bergstrom**  
INBOUND CALL COORDINATOR

**HubSpot**



### **Part 3**

# Best Practices for Adding Call Intelligence to the Marketing Mix

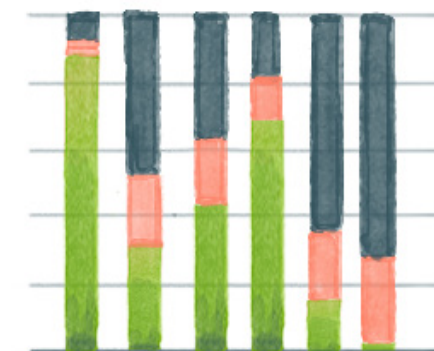
# Getting Buy-in for Call Intelligence

**A**t this point, you're probably pretty excited about how much more you can accomplish—and contribute to revenue—by adding call intelligence into the mix. But maybe you're hesitant to move forward because you just aren't sure how inbound calls are being handled today and don't want to step on your sales team's feet.

Well, you're not alone. Even companies with the most sophisticated marketing machines often aren't sure what's driving inbound calls and what happens with them once sales personnel answer the phone.

No doubt your sales team is fielding these calls; nothing sounds sweeter to them than the ring of the phone. But that doesn't mean they won't invite a better way to handle these calls—and drive more of the winning ones.

You don't have to jump through hoops to take advantage of Invoca's technology. Get credit for what you've been missing (and get visibility into what, to date, has been a dark world) simply by adding JavaScript and a phone number to your existing campaigns and content. You just do what you do best—create winning campaigns that motivate buyers to call—and the software does the rest.



Call intelligence has the power to yield insightful data and analytics about your buyers and your marketing performance.

*“As a lead source, inbound calls are rich with intent. Gaining a better understanding of what marketing activities lead to inbound calls is important to us. Not only can we optimize, we can harvest insight from the call data.”*



**David Austin**

DIRECTOR OF ONLINE MARKETING

**salesforce**

## Why Marketers are Going Mobile



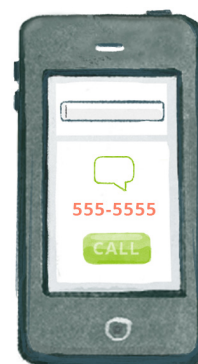
**70% of mobile searchers** have used click-to-call to connect with businesses directly from their search engine results pages.



**61% of mobile searchers** state that **click-to-call is most important** in the purchase phase of the shopping process.

# 74%

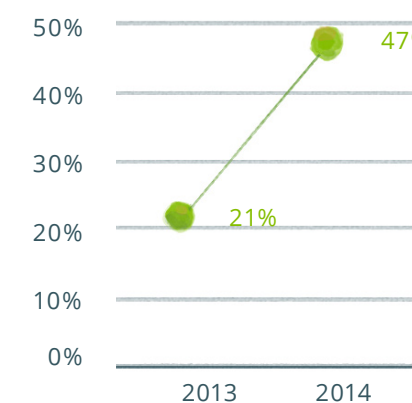
**of mobile searchers** say they are more likely to explore other brands if a business does not associate a phone number with its search results.



**Adding a phone number** to mobile search ads results in an average click-through rate increase of 8%.



**4 in 5 B2B marketers** surveyed plan to increase digital spending in 2014, with 61% saying they will spend more than 25% of their budgets on digital platforms.



**47% say mobile advertising** is a priority in 2014—up from 21% in 2013.

Sources:

*The Role of Click to Call in the Path to Purchase*, Google, 2014

*BtoB Outlook: Marketing Priorities and Plans*, Advertising Age, 2014

# Integrating Call Intelligence with Existing Digital Tools



**A**s a marketer, you need extensive visibility and data. With the growing pressure to contribute to revenue, it's not just the VP of Marketing looking at metrics and making decisions.

Numerous people in your organization look at reports in real time or on a daily or weekly basis. Sometimes they want to dig into the details, such as to see how specific channels and keywords are performing.

Marketing is expected to provide that level of visibility into everything related to the interactions taking place between your company and prospective buyers, and inbound calls are part of the conversation.

But we know the last thing you want to do is bring yet another software package into your organization. You want to consume call intelligence as easily as possible.

By using call intelligence that seamlessly integrates with the tools you already use (such as marketing automation, CRM, automated bid management, retargeting software, website testing software, Web analytics and more), you can easily gain that visibility. You'll know where calls originated from, which ones converted and contributed to the pipeline, how quickly they closed and more.

By understanding which marketing tactics are leading to valuable inbound calls, you can optimize your efforts to deliver more good calls and fewer bad ones.

More than half of the companies surveyed rely on 5 or more marketing technology vendors for services such as marketing automation, CRM, email marketing and social media.

15% use 10 or more different technologies for their daily work activities.

— DNN and Lawless Research



# How to Choose the Right Solution

Now that you're convinced of the value of call intelligence software, you must choose the solution that will best serve your needs. Remember: Not all call intelligence software is created equal. Regardless of the tool you choose, make sure it meets the following criteria at a minimum.

## ❑ Range of functionality

Look for a solution that makes it possible to accomplish a range of goals, including improving lead quality and managing campaigns from start to finish in one easy-to-use interface.

*"With call-based analytics layered on top of marketing campaigns, B2B marketers gain a measurable assessment of lead quality and a competitive advantage."*



**Abid Chaudhry**

SENIOR DIRECTOR OF INDUSTRY STRATEGY  
AND INSIGHT, BIA/KELSEY

## ❑ Designed for call intelligence

Insist on a platform built from the ground up to provide insight and intelligence into all your inbound calls.

## ❑ Beyond IVR

Instead of settling for an IVR, look for a solution that segments based upon location and time of day, qualifies calls, and allows you to ensure that calls are getting to the correct destination.

## ❑ Seamlessly works in your environment

Confirm that the solution integrates with all the software you use today in your marketing efforts, such as marketing automation, CRM, tag management, retargeting and analytics technologies.

## ❑ Flexible call tracking

Look for a solution that lets you automatically eliminate customer service calls from your inbound phone leads tracking.

## ❑ Dynamic, session-based call tracking

Make sure the solution provides analytics that capture all the online activity that leads up to a phone call, even when that activity spans days and weeks.

How to

# Choose the Right Solution

(Continued)

- ☐ **Robo call blocking**  
Advanced solutions call upon proprietary blocking technology to eliminate a majority of fraudulent calls.
- ☐ **Pricing Flexibility**  
Choose a solution that only charges you when calls are connected rather than for a block of minutes you may not use.
- ☐ **Cross-channel journey mapping**  
Find a solution that can track the customer journey from the digital world to the phone so that you understand all the touchpoints your prospects encounter on the path to purchase.
- ☐ **White label reporting**  
Agencies will want the ability to customize the look and feel of the reporting interface to mirror their branding and their clients' branding.
- ☐ **Conversation intelligence**  
Ensure the solution can automatically scan phone conversations for key phrases so that you gain insights that help you arm your sales reps to succeed, such as better positioning your products or services against the competition.
- ☐ **Reliable, forward-thinking vendor**  
Inbound calls are not going away anytime soon, so align your company with a vendor that has developed a proven solution, is continually innovating the solution, and whose vision is backed by significant VC investment.
- ☐ **Detailed reporting**  
Look for comprehensive reporting that allows you to tie calls to a search engine, traffic source, search campaign, landing page and keyword.
- ☐ **Ecosystem integration**  
Look for a solution supported by a network of partners (such as publishers and affiliate marketers) who can help you drive a greater volume of inbound calls.

## Conclusion

# Optimize for Inbound Calls & Grow Your Pipeline

**A**s a B2B marketer, you have plenty of tools to score, assign and optimize digital leads but little control or transparency into offline leads, such as inbound calls. Yet inbound calls are an important source of new revenue. If you ignore this, you're not truly a multi-channel marketer and will always fall short in marketing's contribution to the bottom line. That said, setting up call-based marketing campaigns can be time-consuming and complicated. The right solution allows you to create, track, manage and optimize campaigns all in one place and to seamlessly integrate these processes with the solutions you already use, such as, Google Analytics, Marketo, Salesforce.com, and more.

With Invoca, you can set up campaigns and grab new phone numbers in minutes, then track the origin and see the value of each call—all in real time. A robust IVR lets you filter and route callers based on the metrics you're looking for, so you only spend time and money on the calls you want. And with our unique technology, you can drill down to what keyword, search engine, and referral source is making your phone ring—helping you grow your business with offline, mobile and online campaigns.



Want to learn more about completing your marketing with inbound calls? Invoca can help!

Get in touch:  
**855-502-3225**

*"Invoca gives us a more complete view of the sales funnel. Simply put, we can now understand what marketing activities drive the best conversations."*

 **David Austin**

DIRECTOR OF ONLINE MARKETING

**salesforce**

## Best Practices List

# 12 Ways to Get More Inbound Calls

**1** Put a phone number prominently on your website, lead forms, emails and landing pages.

Giving prospects the option to connect how and when they want builds trust, encourages engagement and reduces abandonment. If they make the effort to call, you can bet these are prospects you want to talk with.

**2** Use phone numbers strategically in advertisements.

While it doesn't make sense to put phone numbers in every ad, it can be extremely effective in the right type of ad to drive calls and improve online engagement. For example, just adding a phone number to paid search ads has been proven to increase click-through rates by an average of 8%, according to Google. Using click-to-call buttons in social media ads can also boost lead generation. Some companies are even using them to facilitate creative types of engagement where prospects and customers can call to leave messages, give feedback, enter contests and more.

**3** A/B test with phone numbers and call-based CTAs.

Use a testing tool or manually test the placement, size, color and overall treatment of your phone numbers on your landing pages and website. Just like any call to action, changing the color and font can make a big difference in driving engagement. Also test the look and style of your click-to-call buttons for your mobile pages. Make your call-based CTAs as clear as possible so your prospects understand why they should call and who they will be speaking to.

## 4 Include a phone number on your content assets.

Although top of funnel content (such as blog posts and infographics) may not prompt immediate action, don't forget to include a phone number on your mid-funnel content (like e-books, white papers and case studies) as part of the CTA. In these cases, adding a phone number will get prospects on the line at the moment of highest interest, when you and your product are top of mind.

## 5 Use click-to-call buttons for your mobile audiences.

Online engagement through lead forms and live chat work well for prospects on desktop computers, but not for mobile users with small touchscreens. Click-to-call gives them the option to talk to a live person and quickly get their questions answered. Nothing beats the power of a voice conversation, so it's a win-win for everyone.

## 6 Always use call tracking phone numbers.

With call tracking, you maintain total visibility into offline conversations and the online marketing initiatives that drive them. For example, you can capture the keyword, ad, and landing page that a prospect visited before making a phone call.

## 7 Empower your agencies and marketing distribution partners with call tracking.

Whether you give your agency and distribution partners unique numbers or provide them logins to your call-tracking platform, make sure they have the tools to drive and track calls for you. This will not only ensure proper attribution, but also will increase your inbound call volume.

## 8 Integrate call tracking with your marketing automation to capture the entire multi-channel path to purchase.

If you're using a marketing automation solution that uses cookies to track prospects' online engagement over time (such as content downloads, clicked email links, pages visited, etc.), you can integrate this data with your call tracking. This way, if a prospect picks up the phone, you can tie that call to all previous online activity. It's truly a multi-channel view of your prospects.

## 9 Integrate call tracking with your CRM to tie calls to revenue.

It's extremely challenging for marketers to track true ROI of their efforts because marketers lose visibility when prospects move offline. If a prospect picks up the phone at any point in the buying cycle, the lead source in your CRM may be blank or mislabeled, so you can't connect the dots between a marketing campaign and a sale. When call data is synced with your CRM, all of your leads will have the correct marketing source so that you can accurately measure your digital marketing campaigns' performance. Now you can tie actual revenue to marketing campaigns, programs and media spend.



## 10 Capture valuable insights and signals in each phone conversation.

With conversation intelligence, you can capture what's happening on your inbound phone calls in an automated and scalable way. Tracking what is said on a phone gives you the power to:

- Understand lead quality
- Monitor the competitive landscape
- Track all types of conversions (Was a demo requested or follow-up phone call scheduled?)
- Test new sales messaging
- Conduct quality monitoring
- Optimize based on callers' questions, objections and actions

## 11 Tailor prospect communication based on conversation intelligence.

With call intelligence tied to your CRM and marketing automation solutions, you can customize communication and messaging so it's highly relevant and meaningful. If a prospect has already spoken with a sales representative, use conversation intelligence to follow up accordingly. Send them content that speaks directly to their use case and pain points. If they mentioned a competitor on the call, send them a buyer's guide that demonstrates exactly why your solution is better. If the prospect is early in the buying cycle, send emails and content that will help move them down the funnel.

## 12 Use call intelligence to do more.

With call intelligence, you can see the big picture of your marketing performance and your customers' path to purchase. With those insights, you can optimize marketing spend and campaigns to drive more of the prospects that ultimately turn into sales.



## Quiz

# Assess Your Inbound Call Maturity

- 1 How much do you know about the inbound calls coming to your business?**
  - A.** None at all
  - B.** I know roughly how many inbound calls we receive, but I don't know where they're coming from
  - C.** I'm able to track where our inbound calls are coming from, but I'm not able to tie those calls to revenue
  - D.** I know exactly which calls are driving revenue and how to optimize our marketing to drive more of those calls
- 2 What type of leads does your sales team prefer to receive?**
  - A.** I have no idea about their preference
  - B.** I've heard they prefer inbound calls, but I'm not sure
  - C.** I know they prefer inbound calls to web leads, but it hasn't changed our marketing strategy
  - D.** I know they prefer inbound calls, and as a result, we're looking for ways that our marketing can drive more calls to our business
- 3 How much do you know about the inbound calls coming to your business?**
  - A.** I don't have the technologies to attribute any of our marketing efforts, let alone inbound calls
  - B.** I can tie a portion of our online marketing campaigns (i.e. web, email, online ads) to sales, but have limited visibility into inbound calls
  - C.** I can attribute all of our online marketing campaigns to sales, but have limited visibility into inbound calls
  - D.** I'm able to attribute all marketing campaigns - online and offline - to sales

#### 4 To what extent can you tie what's said during inbound calls to business outcomes?

- A. I have no idea what's said during inbound calls
- B. I have a vague idea based on some notes in our CRM system
- C. I have software that records calls and flags key words, but we don't do much with that information
- D. I'm able to tie words said during inbound calls to business rules (i.e. if X word is said, enter customer into Y nurture campaign)



#### 5 What percentage of your search ads include phone numbers?

- A. None
- B. Up to 30%
- C. 30%- 60%
- D. Over 60%

#### 6 What percentage of your landing pages feature phone numbers?

- A. None
- B. Up to 30%
- C. 30%- 60%
- D. Over 60%

#### 7 What percentage of your emails feature phone numbers?

- A. None
- B. Up to 30%
- C. 30%- 60%
- D. Over 60%

## Score Your Assessment:

Based on the answer key, add up your score and find your corresponding maturity level and recommendations.

Answer Key:

**A= 1 point** | **B= 2 points** | **C= 3 points** | **D= 4 points**



### Maturity Level: **Low**

**Point Total: 7-14**

**From your perspective, inbound calls are the domain of your sales team** and/or customer service reps. But, just because your inbound call maturity level is low doesn't mean that your approach to marketing is old school. You're probably hyper focused on cultivating and tracking leads through various online channels like online ads, emails, landing pages etc. Why? You think online marketing is the only effective way to attribute your campaigns to revenue.

**PRO TIP** This might seem obvious, but stop ignoring calls! There's a huge piece of the marketing attribution pie that's missing. And, as more people use their mobile phones to do research and connect with businesses, this piece of pie (commonly called the "other" bucket) will only get bigger. Start out by giving your prospects the opportunity to call you and monitor their response. Start including phone numbers on your landing pages, content assets, emails and display ads.

### Maturity Level: **Ad Hoc**

**Point Total: 14-21**

**You realize that inbound calls are delivering valuable leads to your sales team**, but haven't really tried to figure out a way to attribute these calls to your marketing campaigns. It seems too overwhelming and complex, while the online marketing funnel feels so safe! As a result, you're dabbling with a couple technologies or ideas around bridging the online-offline gap, but haven't committed to a strategy yet.

**PRO TIP** Since you know calls are valuable, it's time to commit to making them a priority in your marketing strategy and scale your efforts. Put the people and technology in place to attribute all your calls. Once you're set up, it's time to optimize. Test which campaigns, ads and landing pages drive the most, high-quality calls. Test your phone number style and placement just as you would with any other CTA button. You can also test your call treatment to make sure you're not losing callers and you're only delivering the best leads.

### Maturity Level: **Defined**

**Point Total: 21-28**

**Gold star for you!** You're officially leading the pack when it comes to not only understanding the value of inbound calls, but you're actually delivering results. You must be using Invoca :) Your marketing team is getting credit for the inbound calls that drive sales, and you have the analytics to know what's working and what's not. For example, if a certain keyword that you're bidding on is driving the highest number of quality inbound calls, you will bid higher for that keyword in an effort to drive MORE of those calls.

**PRO TIP** Since you're at the head of the pack, it's important to stay up front -- especially as more marketers begin to create a strategy around inbound calls. But, that will take work. If you haven't done so already, create a rigorous process for evaluating the success of your inbound call program. Are you getting the kind of leads that you want? Are you investing more in the marketing channels that are successful in driving calls? Have you integrated your call intelligence technology with your marketing automation and CRM platforms?