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COURSE REQUIREMENTS

COMPUTER RECOMMENDATION
- Log into your CallTrackingMetrics account
- If you have two monitors, you can show our screen on one and your CTM account on another
- Supported browsers: The latest version of Google Chrome or Firefox
- Have pop-ups enabled

ZOOM SETUP
- For audio issues, call in via phone line
- Attendees are in listen-only mode
- Enter questions in the Questions Box
- Questions will be addressed throughout the course
- Missed questions will receive a follow-up email response
ACCOUNT ASSUMPTIONS

Create an account or subaccount to work in.

New to CTM?

Visit: https://www.calltrackingmetrics.com/plans now and sign up if you are not yet a customer.

Current Customer?

Log into your CTM account.
If you are an agency administrator, visit https://app.calltrackingmetrics.com/accounts/new and create a new sub-account “Academy” for this training class to work in.

Have Agency or Administration access with the ability to purchase tracking numbers.
PART TWO: INTRO TO CTM

SECTION 1
• Call Log Navigation
• Call Scoring
• Call Log Column
• Dial Status
• Filters & Exports
• Softphone

SECTION 2
• IVRs
• Transcriptions
• Keyword Spotting
• Notifications
• Schedules
HELLO!

I’m Jessica Michaels
Google Guru & Product Coach
SECTION ONE: CALL LOG NAVIGATION
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<tbody>
<tr>
<td>1.</td>
<td>Filter icon</td>
<td>Create views using live call log data</td>
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<td>2.</td>
<td>Search field</td>
<td>Search by keyword (account ID, name, date, transcriptions etc.)</td>
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<td>3.</td>
<td>Number of Calls</td>
<td>Click on it to expand</td>
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<td>4.</td>
<td>Auto Load/Stop Loading</td>
<td>Automatically load calls as they come in</td>
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<td>5.</td>
<td>Desk Phone Mode</td>
<td>Switches you into desk phone</td>
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<td>6.</td>
<td>Desktop Notifications icon</td>
<td>View notifications and alerts</td>
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<td>7.</td>
<td>View Columns</td>
<td>Select which items to show in the call log</td>
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<td>8.</td>
<td>Export Calls icon</td>
<td>Export your call log data</td>
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<td>9.</td>
<td>Receive Calls icon</td>
<td>Start/stop accepting calls if you are using the Softphone</td>
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<td>10.</td>
<td>Flag icon</td>
<td>Include or Exclude current view from reporting</td>
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<td>11.</td>
<td>Softphone icon</td>
<td>Open your phone</td>
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**Outbound Phone icon** - The orange phone for outbound calls

**Inbound Phone icon** - The green phone for inbound calls

**Notebook icon** - Visible when there are notes entered on a call

**Target icon** - Displays when keywords have been detected

**Gender icons** - Show if gender information is present

**Transcription icon** - Displays if you have transcriptions enabled

**Spam Level icon** - Detects if the call was detected as potential spam

**Score icon** - Input rating and conversion information for call
1. **Phone icon** - Return the call
2. **Edit Icon** - Brings up full call details to edit
3. **Caller Name** - This is pulled from the CNAM database and is able to be changed and added back into the caller record
4. **Phone Number** - Caller’s phone number
5. **Location** - Geographic location of the caller, based on phone carrier data
6. **Tags** - Tag your calls and create activities based on those tags (free tags show here)
**Contact** - Pulls from CNAM data or NextCaller premium caller ID. Non demographic information can be edited and will show across all calls for caller.

**Visitor Detail** - Detailed information on the advertising data and visitor

**Score** - Agent can tag, score by star rating, and convert a call with an amount

**Email** - Send email to someone about a call

**Voice Analysis** - Shows transcriptions and keyword spotting

**Call flow** - This is the path the call took through routing

**Salesforce** - If your account is integrated, you can see information about caller in Salesforce

**Scripts** - See scripts to help with how to handle the call
Source and Session Data

1. **Source** - Attributes the advertising source of the call per configuration assignment
2. **Tracking Number** - Number called
3. **Landing Page** - Displays the page that the caller landed on
4. **Referring Website** - Shows referring website
5. **Keyword Data** - View keywords searched by caller
6. **Visitor Detail icon** - Open the visitor detail panel
7. **Visitor Likelihood** - Session accuracy score
8. **Google Analytics icon** - Indicates that the data was passed to Google Analytics
• **Visitor Likelihood** - Shows the likelihood that this visitor was the correct one to match to the call.
  - If you see low likelihood scores for a particular source, you need more tracking numbers for that source. You can check how many tracking numbers we would recommend at Reporting > Accuracy Report.

• **Check for other sessions** - View other potential visitors that could have been matched to call but had lower likelihood scores.

• **Advertising Data** - Information pulled through Google Analytics integration.

• **Cookies** - Shows cookies we detected from GA, etc.

• **Map** - The location of the visit that was matched to the call. Could be a more precise indicator of location than the caller ID.

• **Check Analytics** - Shows if accounts are linked and if an event was sent.
Call Scoring
1. **Score** - Allows the call to be scored by star rating and controls the column name and the field name within a call log.
2. **Converted** - Allows the call to be converted and the field name to be changed.
3. **Converted amount** - Toggle “on” to show the converted amount field.
4. **Tags** - This toggle allows the “tag” field to be shown under Contacts in the expanded call log.
5. These are free form tags so anyone can create new tags.
7. **Notes** - Shows the notes field.
Call log Audio & Metrics

Audio
- Recording: play the recorded call
- Length of recording: length of talk time

Metrics
- Date/Time
- Status
The tracking number accepted the call and the caller interacted with the call route, but the caller was not answered (i.e., NOT routed to a call queue, agent or a receiving number).

The call is currently in process.
We routed the call to a receiving number and reached a busy signal.

We routed the call to an agent or receiving number, but no one (or no machine) answered.

The caller hung up before the call finished routing.
ROUTING & ACTIONS

1-Call Routing

Either displays the agent the call was routed or “set agent” where you can manually choose an agent to associate to the call.

If not using the softphone, it will show the receiving number the call was routed to.

Call Path at the bottom showing any voice menus or other call flows the caller experienced.

2-Email Icon

Email a note with the recording of the call to a colleague.

3-Flag icon

Exclude, block, and rate audio quality of the call.
EXCLUDING & BLOCKING CALLERS

- Excluding a call will remove it from reporting.
- Review excluded calls using "show excluded calls" in filter box.
- Blocked callers will hear a busy tone, a "call cannot be completed" message, or in some cases will just ring (depends on the callers carrier).
- Be very careful about blocking by caller name. You would not want to block CNAM’s like "Restricted" because that would block all callers without names in their CNAM record.
- You can review blocked numbers and edit them at: Calls > Blocked Numbers.
The **filter menu** allows you to create, edit, and save views of the call log, based on criteria that you select.

- You can manage your filters by clicking “Manage Filters”.
- Custom fields will also be shown in the filter menu.
The Export option contains the same fields as the main filter menu, and allows you to export data from the call log based on criteria that you select.

- Custom fields as options
- Save export options

Exporting The Call Log
Softphone

Our browser-based phone offers maximum flexibility

- Our Softphone is a program that enables VoIP telephone calls from computing devices.
- All you need is an internet connection and a headset with a microphone, and you can work from anywhere.
- Has all the telephony features you’re used to such as hold, mute, and transfer, as well as many new features your current desktop phones may not have.
Working Session

1. Edit scored call fields, and score a call.
2. Create a custom filter, and save it.
3. Filter and export your call log.
4. Use your softphone to place an outbound call.
EDIT SCORED CALL FIELDS, AND SCORE A CALL

WORKING SESSION
STEP 1

- Navigate to the Calls Tab > Call Scoring
- Name your Score Column
- Enable Converted and name field
- Enable Converted Amount
- Name field Revenue
- Enable Reporting Tags
- Enable Limit the tag list and create list:
  - Sale
  - Support
  - Employment
  - Appt Schedule
  - Mars
- Save Changes
CREATE A CUSTOM FILTER AND SAVE IT

WORKING SESSION, STEP 2

- Navigate to the Calls Tab > Call Log > Filters
- Select the date range to This Month
- Add type Inbound Text
- Remove type Outbound Calls
- Select the Tracking Source Website
- Select the Reporting Tag to include Sale
- Set the Total Time to be greater than or equal to 120 seconds
- Set Score Calls to between 3 & 5 Stars
- Set Converted to Is Set
- Save Filter
• Navigate to the Calls Tab > Call Log > Export Calls
• Select Export Method Email
• Input your email address
• Select your saved filter Converted website calls over 2 minutes
• Select phone format ###-###-#####
• Set the time format to HH.MM.SS
• Set the export format to CSV
• Schedule the export to run Weekly
• Select Run Export Now
SOFTPHONE

Our browser-based phone, which can be used for inbound and outbound dialing.
Capture critical call details with call recordings and transcriptions
The keyword spotting feature automatically identifies words spoken in your phone call conversations, and can trigger a variety of actions. For example, you could automatically categorize your calls based on keywords spoken, or alert a manager if high priority tasks need to be taken based on the content of a conversation.

Like many of our features, keyword spotting is highly customizable, and can be adjusted for the specific phrases you want to watch out for in calls.
Spam Detective keeps you focused on what matters.

Customers using Spam Detective don’t have to worry about spam calls taking up the precious time of their agents, so they can stay focused on valuable conversations.
CALL SETTINGS

- Navigate to the Numbers tab > Call Settings
- Select Account Level
- Enable recording for outbound calls
- Enable Transcribe my calls
- Enable Include transcription in notification emails
- Enable Auto Text response
- Create response:
  - Thanks for contacting us, Respond with "Spring" and receive a 20% promo code.
- Save Changes
WORKING SESSION

TRANSCRIPTIONS

- Place a test call and review the transcription
- Navigate back to the call settings and enable Enhanced Transcriptions
- Place a test call and review the transcription
- Compare results
KEYWORD SPOTTING RULES

- Navigate to the Reporting tab > Keyword Spotting
- Select New Rule
- Select +Add Keyword
- Add: Sales, Credit Card, Purchase, Order, Buy, Money
- Add Action Tag Call as Sale
- Add Action Score Call as 3 Stars
- Add Action Convert Call as $25.00
- Save Changes
- Add Account Level call settings
- Place a test call
• Navigate to the Numbers tab > Call Settings
• Scroll to the Spam Detective Tab
• Enable The Spam Detective
• Select Solve CAPTCHA
• Save Changes
SECTION 2

Text Log Navigation - Schedules - Notifications - IRV Menus
- Voicemails - Working Session
CALL SCHEDULES

You can create schedules for each of your agents, a specific call queue, a voice menu.

Schedules will determine when a particular configuration will ring. For example, you may wish to set a schedule for a typical Monday-Friday work day, one for after business hours during weekdays, and one for weekends.
Notifications provide instant visibility into your advertising call tracking program.
IVR MENUS

Voice menus allow the caller to use key presses for quick routing to the correct place.
Virtual voicemail boxes save hardware costs, and are proven to increase response time.
WORKING SESSION
SCHEDULES

- Navigate to the Numbers tab > Call Schedules
- Select New Schedule
- Name schedule & Description After Hours
- Set the time zone to GMT 05:00
- Save Changes
- Select Work Days from 12:00am - 9:00pm
- And from 5:00pm - 12:00am
- Save Changes

WORKING SESSION
STEP 1
**SCHEDULES**

- Navigate to the Numbers tab > Call Schedules
- Select New Schedule
- Name schedule & description Business Hours
- Set the time zone to GMT 05:00
- Save Changes
- Select Work Days from 9:00am - 5:00pm
- Save Changes

**WORKING SESSION**  
**STEP 2**
WORKING SESSION
STEP 3

VOICEMAIL

- Navigate to the Numbers tab > Voice Menus (IVR)
- Select New Voice Menu
- Select from the pre-set Voicemail
- Customize your greeting message
- Tag this call as Voicemail
- Save Changes
WORKING SESSION

STEP 4

VOICE MENUS

- Navigate to the Numbers tab > Voice Menus (IVR)
- Label Sales
- Select Dial Number, Select receiving number
- Name your menu Main Routing
- Name the description Main Routing - Business Hours
- Set the schedule to Business Hours
- Add a greeting: Thank you for calling, please press 1 for sales, 2 for support, 3 for employment, 4 for appointment scheduling, and 5 to leave a voicemail.
- Save Changes
WORKING SESSION
STEP 5

NOTIFICATIONS

• Navigate to the Reporting tab > Notifications
• Name it Weekly Calls
• Set the type to be Weekly Digest of Calls/Texts/Forms
• Save Changes
• Add Recipient Email Address
• Save Changes
• Create a Subject line of Account Name Weekly Calls/Text/Forms
• Select the fields to include in the notifications
• Save Changes
QUESTIONS?
Thank you!