Marchex®

Why Call Analytics capabilities make sense for financial services firms

Financial services companies do business in a highly competitive landscape. If a consumer wants to purchase insurance, take out a mortgage or acquire another financial product, there is no shortage of brands to choose from. So, how do you make sure your brand can compete?

Optimize your marketing budget

Measuring the performance of call extensions and click-to-call ads extends beyond counting clicks. You can learn which keyword drives the most calls and which channel performs best. Call Analytics shines a light on the offline blind spot that can happen when clients leave the digital realm via a phone call.

## Improve call center operations and the customer experience

Besides optimizing marketing spend to drive more calls, Call Analytics can help improve the operational side of the phone call once it's received. AI-powered speech analytics technology can analyze inbound calls at scale and uncover patterns not visible before. Learn which key phrases indicate a high intent to purchase and revise agent scripts to drive to that outcome. Understand which agents are high performing and leverage their best practices.

Offer excellence at every interaction

In the digital world, a negative review in Ohio can keep a potential customer from calling in Arizona. Many customers prefer to call when evaluating financial products, but how do you know the customer who called your branch in Washington received the same excellent experience as your customer in Texas?

To understand the caller experience, you need to know what happens on each call. Speech analytics technology offers a cost-effective, scalable way to evaluate performance across multiple locations.

With Marchex, you can view your data in meaningful ways to better understand your customers

96%
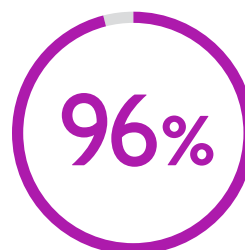
96% of Marchex customers surveyed rely on Marchex Call Analytics reporting every day.[1]

[1]TVID: 6E4-D49-430

Get visual with your data: Dashboards can provide actionable insights in real time

Connect media spend to conversations

The **Lost Opportunities Dashboard** can measure call volume and the reason calls fail. Filter results by time, location and other factors to address specific issues. Improve call handling procedures, adjust media placement and timing, and track long-term trends. Identify callers with a strong intent to buy.


Improve call handling across locations

The **Agent Script Tracking Dashboard** can rank scripts and agent performance to help you optimize your messaging across locations and provide training to agents so they are more effective.

Identify callers with a high intent to buy

The **High Intent Dashboard** can surface calls mentioning chosen keywords, such as "in stock," and measures the outcome of the call. Create look-alike audiences on social media or, for calls the that didn't convert, use call data for retargeting these prospects.
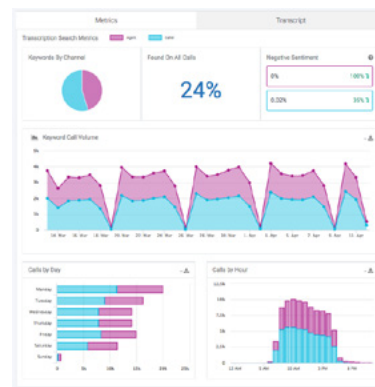
Gain deeper insights

The **Transcription Search Dashboard** can reveal customer sentiment and other trends so you can respond.

To learn how you can gain insights from your inbound phone calls, visit Marchex.com or call 1.800.914.7872.

About Marchex

Marchex helps businesses gain deep insights from inbound calls. Marchex customers use our platform to benchmark performance, improve caller experiences, achieve complete marketing spend attribution, and convert callers into sales. Learn more at marchex.com or the Marchex blog.

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