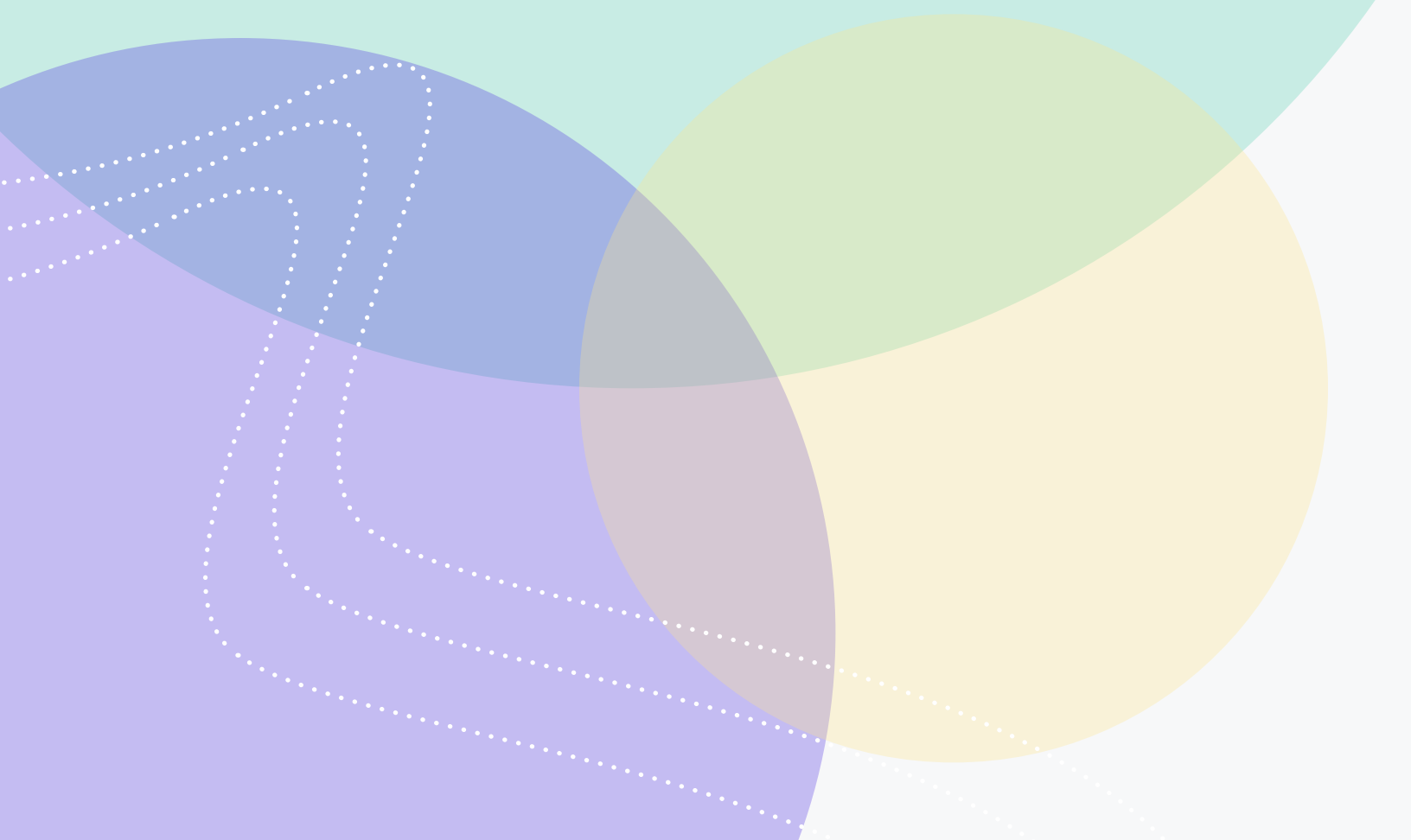




# The Revenue Execution Playbook for B2C Marketers

5 Plays for B2C marketers to drive more revenue and boost customer acquisition without spending more on advertising



# The B2C Play for Profitable Growth

Leaders at B2C brands are facing a watershed moment. The market has shifted from demanding growth at all costs to an eye for profitable growth. It's a high bar to reach. This has put intense pressure on marketing and sales teams to align on strategy and prove their investments drive revenue growth, but they struggle to meet either edict.

The challenge for B2C revenue leaders stems from how their customers shop. In industries like healthcare, financial services, telecom, and home services, the stakes are high, purchases are complex, and consumer investment is substantial. The buying journey spans digital and offline channels, deepening the disconnect between the marketing team that engages potential customers and the sales team that closes the deals.

This disconnect is where the cracks in the buying journey begin to form. We found that 90% of revenue leaders think that alignment across their departments is critical to drive revenue growth, while only 1 in 10 say their teams are strongly aligned.

Poor alignment muddies the visibility of the buying journey, causing marketing spend to be wasted on ineffective programs, disjointed buyer experiences, and lost revenue. This is especially dire because once-in-a-decade purchases are common in these high-stakes industries. Blow it, and you lose that opportunity forever, but get it right, and you gain a high-value customer for life.

To win more customers and drive growth, there's a critical need for technology that seamlessly integrates data across sales, marketing, and contact center teams. Comprehensive revenue execution platforms like Invoca do just that by connecting the buyer journey from first digital touch to final sale and—more importantly—connecting the teams that are ultimately responsible for driving revenue growth.

The accelerating pace of change in both consumer behavior and AI-powered technology—combined with a challenging macroeconomic environment and regulatory regime—is creating more separation between the winners and losers in every industry. In this new world, consumer brands need tighter alignment across the entire revenue organization to succeed and thrive. And ultimately that alignment is a function of great technology, meaningful organizational change, and a relentless focus on the consumer.

To help you get there, we've created this five-play guide to driving growth with revenue execution platforms. Read on to see how it works, your bottom line will glad you did.



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**Peter Isaacson**  
CMO  
Invoca

# Table of Contents

Select a title to jump to that chapter.

## PLAY 1:

pg. 5 **Measure Your True Revenue Performance**

## PLAY 2:

pg. 11 **Optimize Paid Media with 1st-Party Data**

## PLAY 3:

pg. 18 **Optimize Social Media Ads with 1st-Party Data**

## PLAY 4:

pg. 25 **Create a Seamless Online-to-Offline Buying Experience**

## PLAY 5:

pg. 33 **Integrate First-Party Data Across Your Tech Stack to Automate Results**

**PLAY 1:**

# Measure Your True Revenue Performance

**GO TO PLAY 2**

Accurate measurement is the cornerstone of successful marketing programs. However, most B2C marketers can't measure performance of one key channel: phone calls. This data gap doesn't only impact your ability to measure what's happening on calls. It prevents you from accurately assessing and optimizing performance across every channel from search to social to your website.

In automotive, healthcare, home services, financial services and other high-touch, high-stakes industries, customers frequently call to set appointments, get quotes, ask questions, or complete their purchases. Without visibility into calls, you're missing the most critical part of your buying journey data and a first-party, voice-of-the-customer data goldmine.



Callers will tell you exactly why they picked up the phone and you'll know definitely whether they converted and why (or why not). For these industries, a significant number of leads are created and converted on the phone, so if you're not measuring it you can't possibly optimize it.

"Before using Invoca, we were missing attribution from an important piece of the customer journey: phone calls. This blind spot was making it hard to optimize our marketing campaigns and improve customer experiences."

**Kellyanne Perez-Vera**  
Marketing Activations Manager



# Issues when marketers can't measure calls



## Inflated CPA

Half or more of your marketing-driven conversions happen on the phone. If you can't accurately measure and report these conversions, your CPA will appear much higher than it actually is.



## Underreported revenue

If you can't account for a large portion of your conversions, you can't count the revenue toward your ROAS.



## Poor optimization

Phone calls provide rich data about exactly which paid media efforts are driving results. Without call data, you can't optimize your ad spend to drive the highest-value leads.



## Wasted ad spend

You don't know if your campaigns are driving quality phone leads, (let alone if they converted) without visibility into calls. So you're guessing and allocating budget in the wrong places.



## Disjointed buyer experience

If you don't know why leads are calling, you don't have the data required to provide a seamless online-to-offline buying experience, which drives down conversion rates.

# Get Measurement Data for the Entire Buying Journey

With Invoca’s revenue execution platform, you don’t just get attribution for calls, you get visibility of the entire buying journey from click to call to conversion. With first-party data on buyer interactions, intent, and call outcomes, you can see and measure the success of the end-to-end buying journey. This means you can connect the digital journey to calls and accurately measure the revenue your marketing investments drive whether conversions happen online or on the phone.

INVOKA CONVERSATION PROFILE	
Search Keyword	"high speed internet"
Google Click ID	542186921
Campaign	Bundle & Save
Web Visitor ID	X854962
Serviceable Address	True
Product in Cart	Internet & TV
Calling Page URL	/checkout
Caller ID	404-464-0231
Interest Driver	Moving
Manager Escalation	False
Outcome	New service activation
Agent	Candace Yen
Mentioned Promotion	True
Call Quality Score	6.6/10.0

**Understand consumer intent, lead quality, and campaign attribution**

**Automatically measure intent, outcomes, and conversions to understand best-performing media**

**Activate data in digital media, analytics, and CRM**

Integrations: Google, Adobe, Salesforce, Five9

Here is some of the new marketing measurement data you can unlock with Invoca.

# Attribution for marketing-driven phone calls

With Invoca, you can accurately measure your results with complete visibility of what investments drive calls to the contact center or business locations.

When you fully understand the results your marketing programs drive both online and on the phone, you can make smarter optimization decisions and eliminate wasted spend on ineffective campaigns. Better yet, you'll realize a significant reduction in measured CPA and an increase in ROAS and reported revenue because you can include previously uncounted phone conversions in your calculations.

Attribution data from Invoca includes:

**Campaign**

Learn which campaigns are driving calls that result in conversions.

**Ad clicks**

See which ads drive high-intent leads to call and adjust bidding and creative accordingly.

**Channel**

Compare every channel that drives calls including search, display, and social.

**Keywords**

See which paid search keywords are most effective and automate bidding optimization.

**Digital ad identifiers**

Use ad integration identifiers (e.g. GCLID/GBRAID for Google Ads and Analytics) to tie ad clicks to calls in your ad and analytics platforms.

**Website data**

See which pages are driving calls (like shopping cart or service cancellation pages) and attribute them to call outcomes.



## Better measurement with AI

Invoca Signal AI Studio makes it easy to analyze inbound calls to detect virtually any event or action you can think of. Powered by patented machine learning, it's fast and easy to create AI models trained on your business's calls to capture the intent, product interest, and conversion outcome of every conversation. Use AI to get game-changing data to power your full marketing measurement strategy at scale.

# Buyer journey data

It's important that you not only know if a lead called, but why they called. With Invoca, you can understand the full buying journey and measure success at every step.

INVOCA CONVERSATION PROFILE	
Search Keyword	"high speed internet"
Google Click ID	542186921
Campaign	Bundle & Save
Web Visitor ID	X854962
Serviceable Address	True
Product in Cart	Internet & TV
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Caller ID	404-464-0231
Interest Driver	Moving
Manager Escalation	False
Outcome	New service activation
Agent	Candace Yen
Mentioned Promotion	True
Call Quality Score	6.6/10.0

Uncover buyer journey and diagnose digital abandonment

Understand intent, caller issues and conversion outcomes to optimize the digital experience

Activate call conversion data in analytics solutions

Buyer journey insights include:

**Web pages viewed:**

Learn what drives leads and non-leads to call to improve the digital experience to deflect low-intent calls.

**Journey optimization:**

Understand exactly which buyers should be optimized for digital purchases and which higher-value callers should be directed to pick up the phone for upsell opportunities.

**Digital leakage:**

See where leads are leaving the digital flow and calling to diagnose and fix the online experience.

**Call insights:**

Learn what your customers are saying and what their needs are to improve messaging. Invoca's conversation analytics AI makes it easy to find common topics and drill down on calls.

# Buyer intent data

It's great if you know your marketing drives calls, but it's even better if you know whether or not they are high-intent leads. Invoca's AI analyzes calls to detect lead intent so you can get a handle on lead quality and optimize your programs accordingly.

**INVOCA CONVERSATION PROFILE**

Search Keyword	"high speed internet"
Google Click ID	542186921
Campaign	Bundle & Save
Web Visitor ID	X854962
Serviceable Address	True
Product in Cart	Internet & TV
Calling Page URL	/checkout
Caller ID	404-464-0231
Interest Driver	Moving
Manager Escalation	False
Outcome	New service activation
Agent	Candace Yen
Mentioned Promotion	True
Call Quality Score	6.6/10.0

Google Adobe Salesforce Five9

- Media attribution at the keyword and campaign level
- Use lead quality and conversion data to create digital targeting/suppression audiences
- Retarget high-intent callers who didn't convert and suppress those that did

You can also use this data to retarget high-intent callers who did not convert to keep the conversation going and improve conversion rates. This data can be streamed to ad platforms, CRMs and analytics to automate your follow-up strategy.

Buyer intent signals include:

### Purchase intent

Is the call a lead or were they calling for another reason like customer service? Use this data to measure the success of your paid media and to retarget and suppress ads.

### Product interest

What products or services were mentioned on the call? Which product pages were visited? Retarget leads that did not convert with precise ads that match their interest.

### Objections

Learn why leads do not convert to better overcome objections like price, availability, and service offerings and then use this data to retarget with promotions.

### Competitor mentions

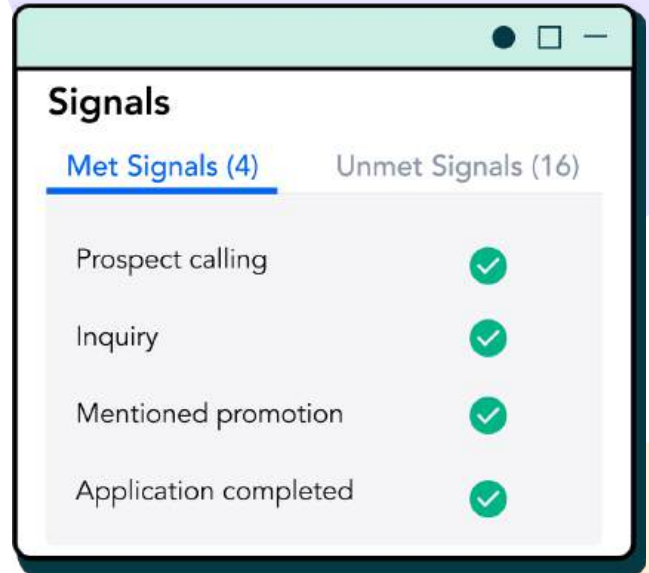
Learn if the competition is getting in the way of closing more sales.

## Call outcome data

When you combine intent data with call outcome data, you can accurately measure lead quality, conversion rates, and revenue. Invoca Signal AI can accurately and automatically detect call outcome events and stream that data to your ad, analytics, CRM and other platforms to enable measurement and next-best actions.

Invoca’s customizable, real-time AI can measure just about any event you can think of, from appointments to quotes to purchases. If you can think of it, you can set up an AI Signal to measure it.

With complete and accurate measurement of the full buying journey, you can optimize every step along the way to drive more leads and revenue.



### RESULTS

**45%**

increase in marketing-driven leads

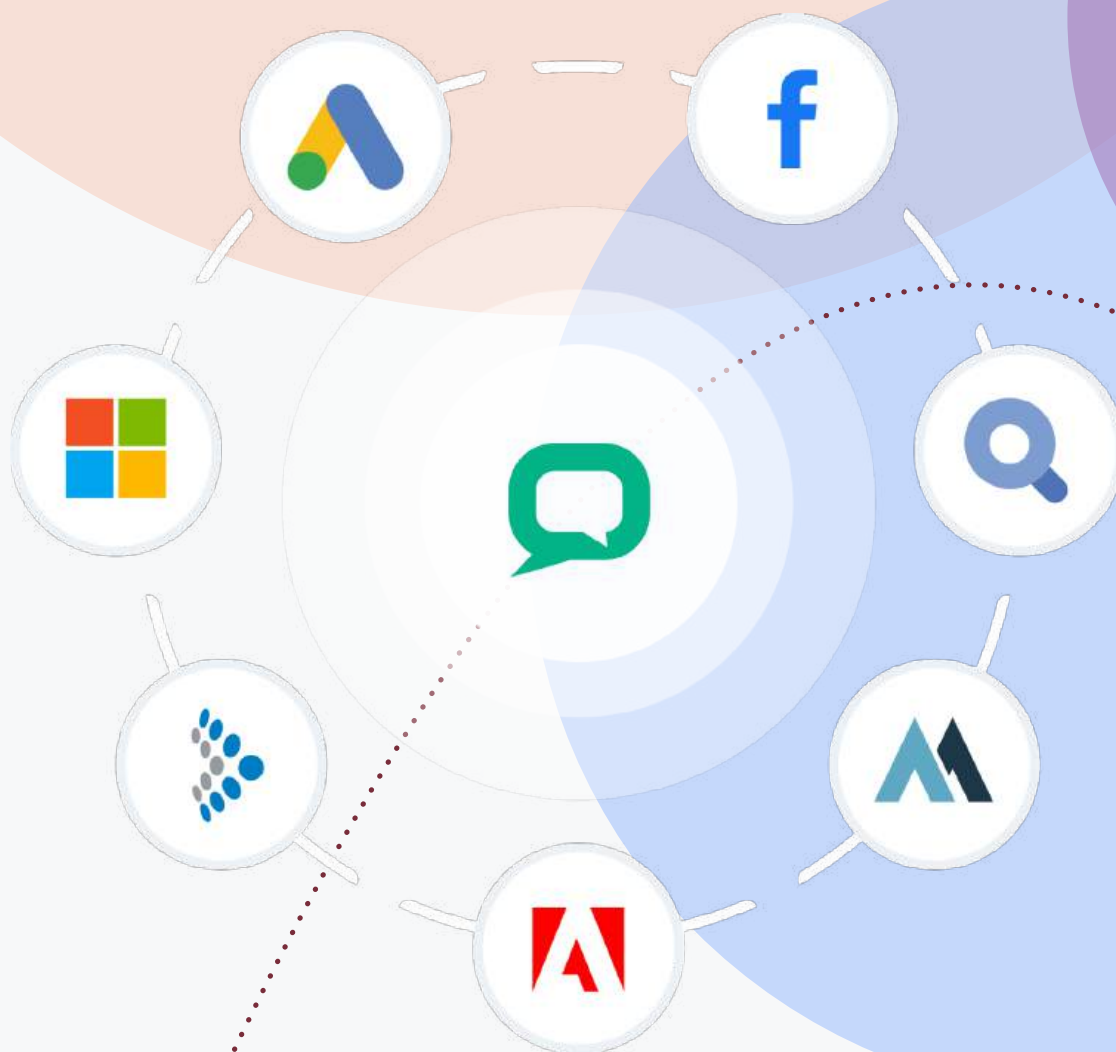
“What’s attractive about Invoca is the AI — it shows us not just how many calls our marketing campaigns drove, but how many of those calls led to booked appointments. On top of that, it was easy for us to train the AI signals and we were able to derive value from it quickly.”

— **David Chase**

Director of Digital Marketing & Consumer Engagement

**PLAY 2:**

# Optimize Paid Media with 1st-Party Data

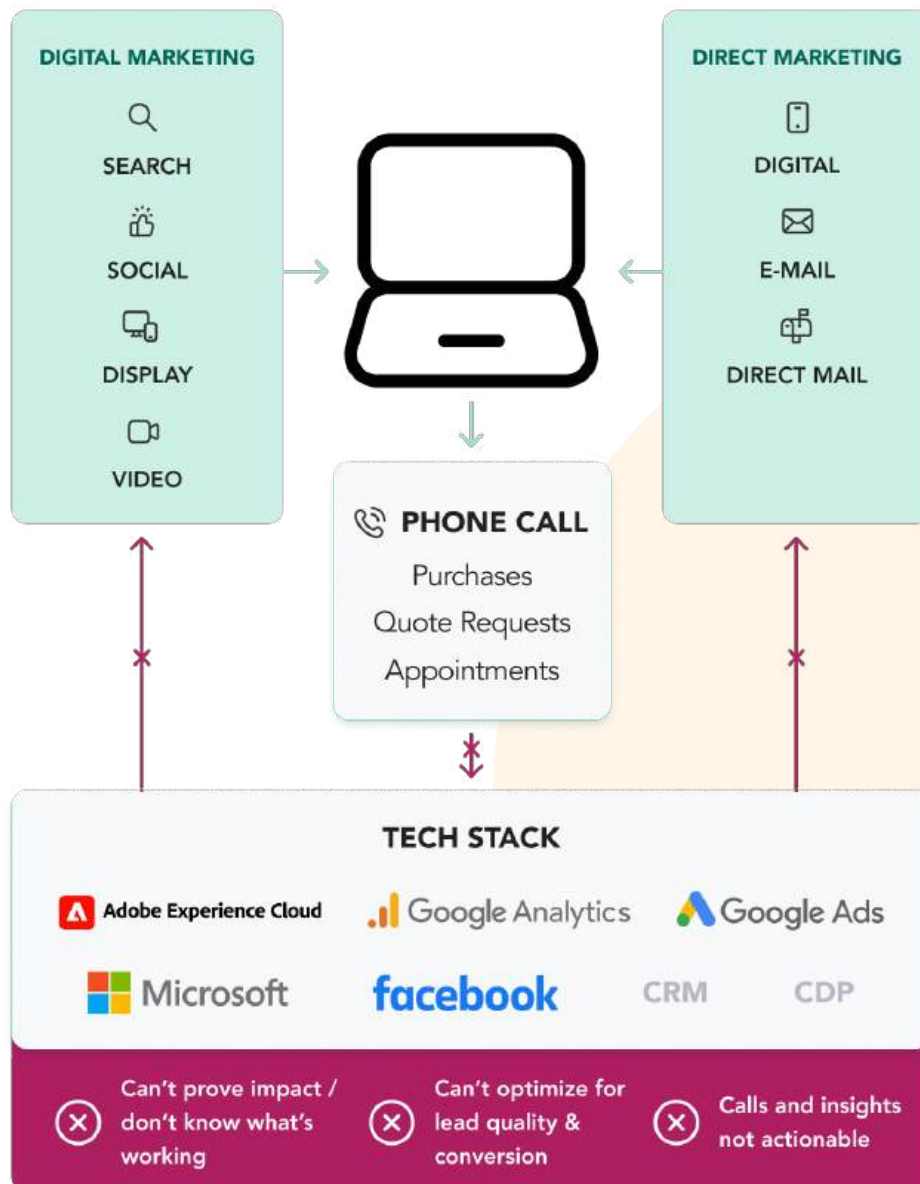


**GO TO PLAY 3**

Today, marketers face stagnant paid media budgets and increasing demands to directly tie media investments to revenue. To drive growth without increasing ad spend, you need complete customer journey data to squeeze every last bit of ROI from your budget and prove your programs drive revenue.

Most B2C marketers experience a big data gap when their paid search, display, and other ads drive customers to call. (We'll cover social media ads in the next play!) In automotive, healthcare, home services, financial services, and other high-touch, high-stakes industries, customers frequently call to set appointments, get quotes, ask questions, or complete their purchases.

In these industries, many leads are converted on the phone. So if you're not measuring it, you can't optimize it or get credit for all the revenue you drive.



# How missing 1st-party call data hurts paid media results



## Call quality

You may know that your ads drive calls, but you don't know if those calls are leads, support calls, or general questions. Without these insights, you'll inevitably miss optimization opportunities and overwhelm the contact center with non-revenue-generating calls.



## Inaccurate audience targeting

It's likely that your highest-quality leads convert over the phone. If you don't know who they are and can't connect that data to your ad platforms, you can't build high-performing audiences that drive sustained growth.



## Underreported performance

Without the ability to tie ad clicks to call outcomes (e.g. conversions), you're likely reporting far fewer leads and less revenue than you're actually driving.



## Poor retargeting performance

Without data on call conversions, you spend budget retargeting customers who have already converted and miss opportunities to retarget unconverted high-value leads.

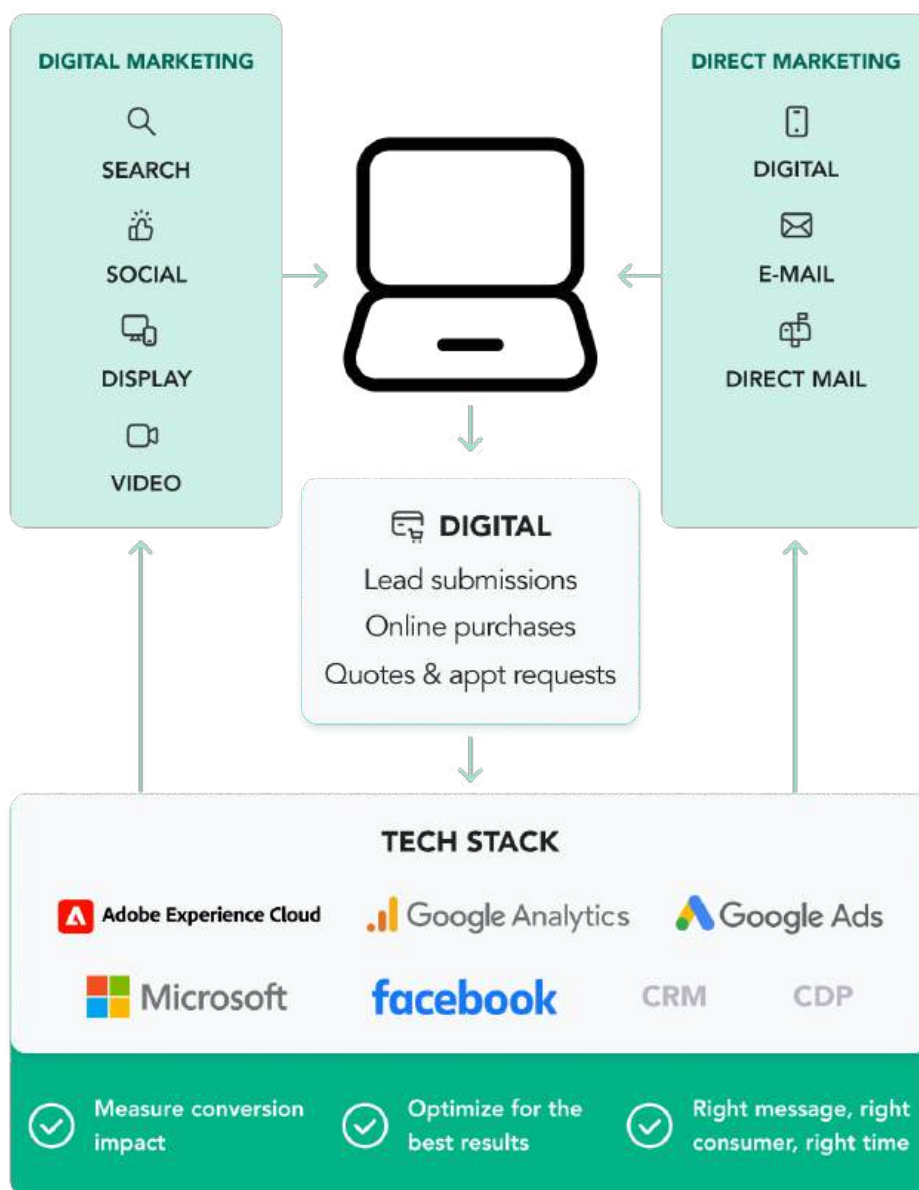


## Wasted budget

If you have to guess which campaigns, ads, and keywords drive phone leads and conversions, you're making bad optimization decisions based on bad data. You waste precious budget on ads and keywords that drive calls that don't convert and don't allocate enough to the ones that do.

# Optimize Paid Media with Complete Buying Journey Data

With Invoca's revenue execution platform, you know exactly what is driving high-intent leads and conversions over the phone so you can improve performance and stop wasting budget on ineffective campaigns. You can automatically detect call outcomes, conversion events, and caller intent and get granular attribution data down to the keyword level. You can also stream call conversion data to virtually any ad platform to automatically optimize for high-intent sales calls across digital platforms.



Here are a few ways to drive more revenue from your paid media—without increasing your ad spend.

# Improve lead quality

The first step to improving your conversion rate is determining the intent and quality of calls your marketing drives. Invoca's AI can detect caller intent so you know what ads, keywords, web pages, creative, and more drive qualified leads to call. Once you determine what drives the highest-value leads to engage with your brand, you can use this accurate, first-party intent and conversion data to optimize your campaigns and target highly qualified audiences that will drive more revenue.

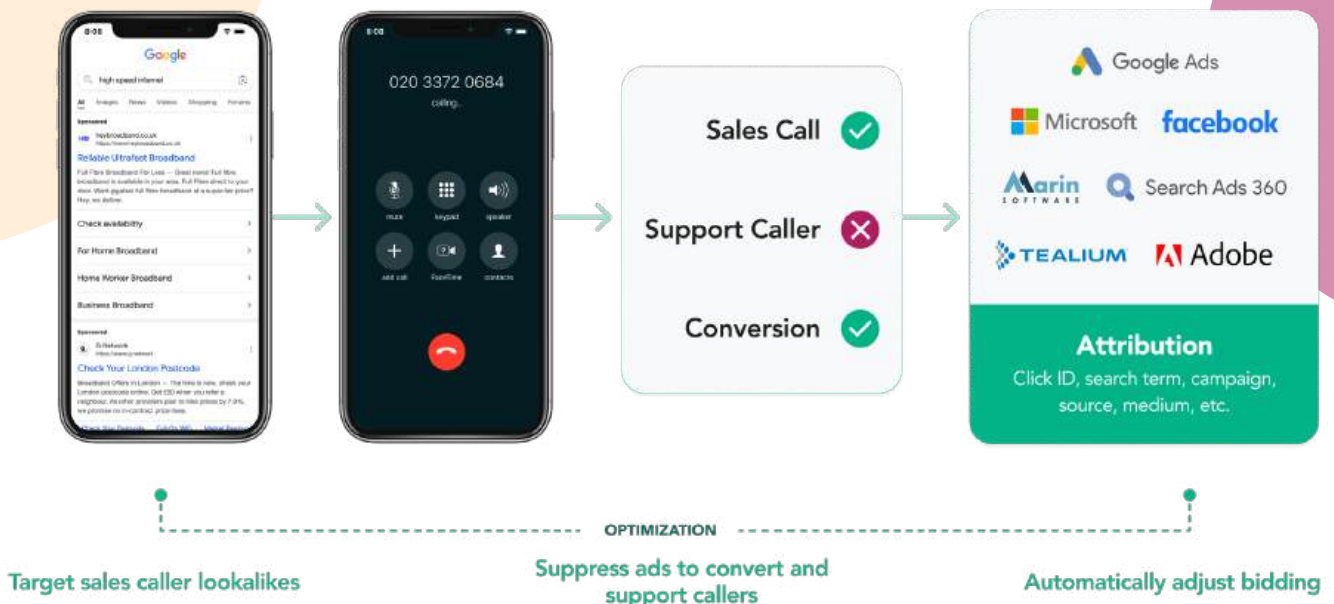
# Retargeting that converts more leads

High-intent phone leads that don't convert create a valuable retargeting opportunity. Caller intent data allows you to detect hot leads who call and don't convert and this data can then be used to retarget them across any channel. For example, if a lead calls after clicking a search ad but doesn't convert, you can retarget them with social media and display ad offers tailored to their specific product or service interest.

# Optimize to Reduce wasted spend

Stop wasting your budget on ineffective ad buys with accurate, privacy-friendly first-party data to power your optimization efforts. Invoca's AI accurately detects caller intent and conversion actions so you know whether your ads are driving sales or non-revenue-generating inquiries like customer service calls.

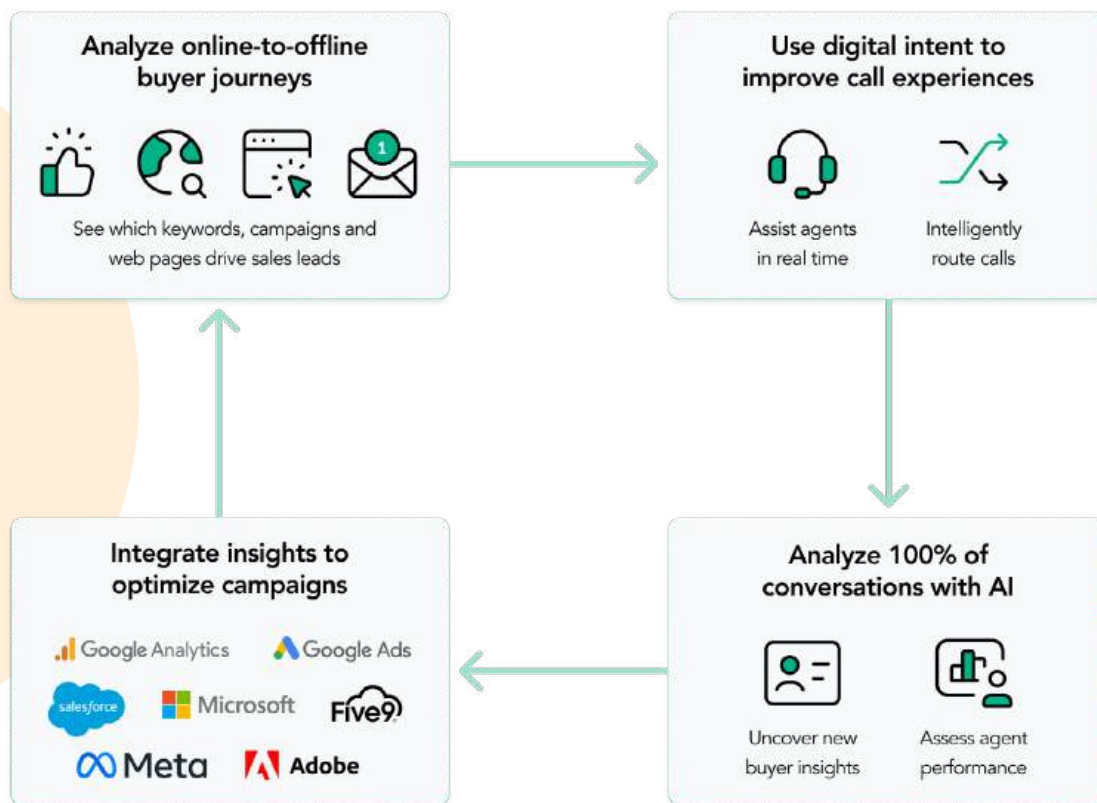
Conversion data can be streamed to ad platforms, DSPs, and CRMs like Google, Meta, The Trade Desk, Adobe, and Salesforce, to automate optimization, bidding, retargeting, suppression, and more. You can also automate ad suppression to recently converted customers and stop wasting budget presenting them with ads for something they already bought.



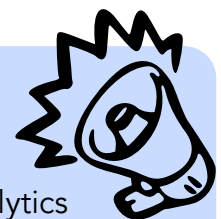
# Get credit for all the revenue you drive

With Invoca, you can finally get credit for every conversion and all the revenue your marketing investments drive. Lead and conversion data can be automatically streamed to analytics platforms like Google Analytics 4 or Adobe Experience Platform with Invoca's no-code integrations. Visualize and easily share complete online and offline data to prove your performance and preserve your budget.

When you can attribute all of the conversions you drive—online and offline—you'll also significantly reduce your reported CPA, show a complete picture of your ROAS, and account for all the revenue you drive.

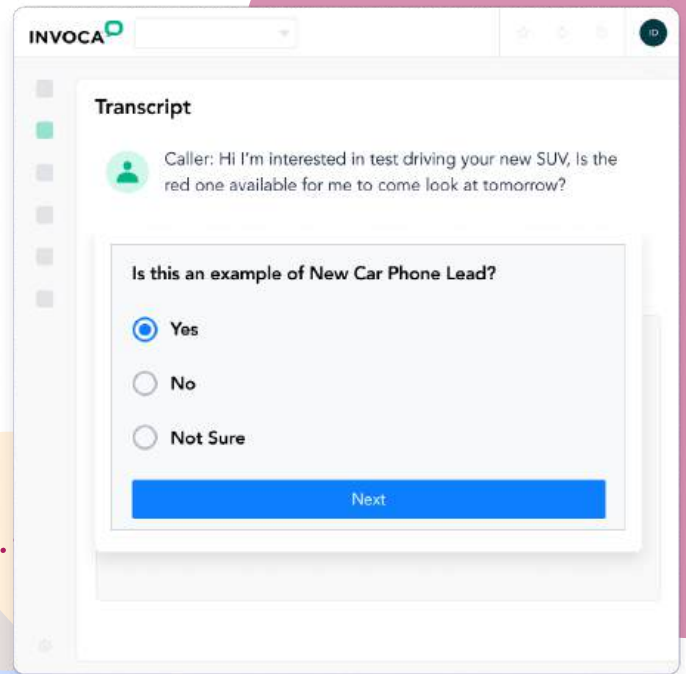


## AI for precise optimization



To get the most out of your optimization strategy, you need conversation analytics AI that's verifiably accurate and tailored to your business needs. Invoca Signal AI automatically analyzes every call to your business, mapping conversations into themes and topics. The AI trains itself to become an expert on your business—expertise it uses to detect the insights you need from calls with unprecedented accuracy.

Unlike “black box” conversation analytics, Invoca’s Signal AI Studio gives you real-time performance dashboards so you can see the accuracy of every AI model. You always know how the AI is performing, and you can easily train any model to improve it. These AI insights provide exactly what you need to drive better outcomes and more revenue.



“There’s nothing I’ve used that’s improved my return on ad spend so quickly, so efficiently, and so quantifiably. I’m no longer shooting in the dark.”

**Charlie Farrell**  
Senior Manager of Search Engine Marketing

**RESULTS**

**82%**

two-year decrease in cost-per-acquisition from Google paid search

**18%**

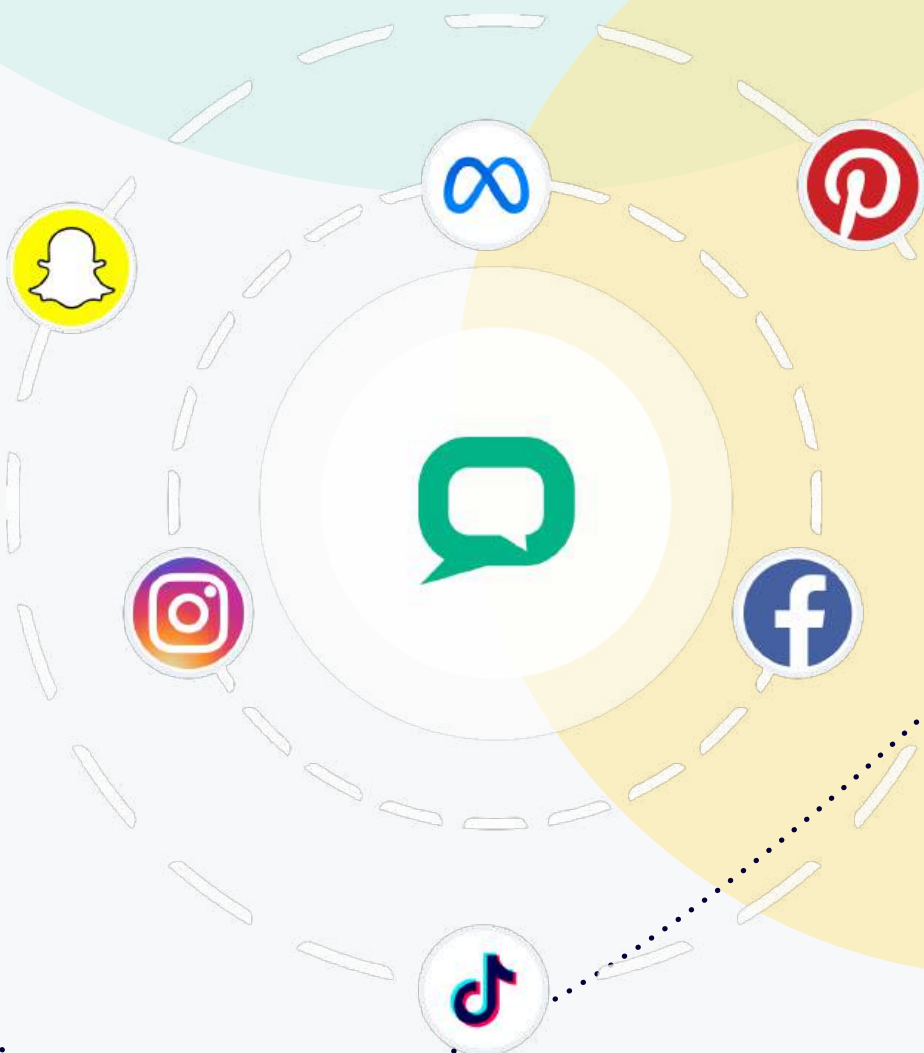
lift in net revenue from paid search campaigns

**2x**

increase in volume of qualified leads

**PLAY 3:**

# Optimize Social Media Ads with 1st-Party Data



**GO TO PLAY 4**

Global social media ad spend overtook paid search last year. Ad spend on Meta alone will surpass traditional TV by 2025. Investment in TikTok ads is accelerating. Social media is on top of the advertising investment heap for good reason — consumers are glued to social platforms.

There's no denying that brands have to invest more in social media advertising to stay relevant and sustain growth without sacrificing paid search success. But that doesn't mean marketers are being handed piles of cash to shovel into the social media ad machine. The reality is, they're facing more pressure than ever to drive bigger returns from their budgets and directly tie their investments to revenue.

This isn't always simple, especially for marketers in healthcare, automotive, home services, financial services, and other industries who rely on social media to drive awareness and as a retargeting channel. These marketers must create social advertising that targets the right ad to the right buyer at the right time, which has become more difficult as third-party cookies are deprecated and other third-party data sources are regulated out of existence.

This balancing act is tricky enough for digital activity, but meeting that challenge is nearly impossible when you're missing a critical component: first-party data from the inbound phone calls your digital campaigns drive.

## How Missing Call Data Impact Social Media Advertising



### Inaccurate measurement

If you can't measure offline conversions that happen in the contact center or business locations, you could be missing half or more of the conversions you drive. This results in inflated CPA and underreported revenue.



### Inaccurate audience targeting

It's likely that your highest-quality leads convert over the phone. If you don't know who they are and can't connect that data to your social media ad platforms, you can't build high-performing audiences.



### Poor optimization

Phone calls provide rich data on exactly which social media advertising efforts drive results. You can't optimize your ad spend to drive the highest-value leads without accurate call data.

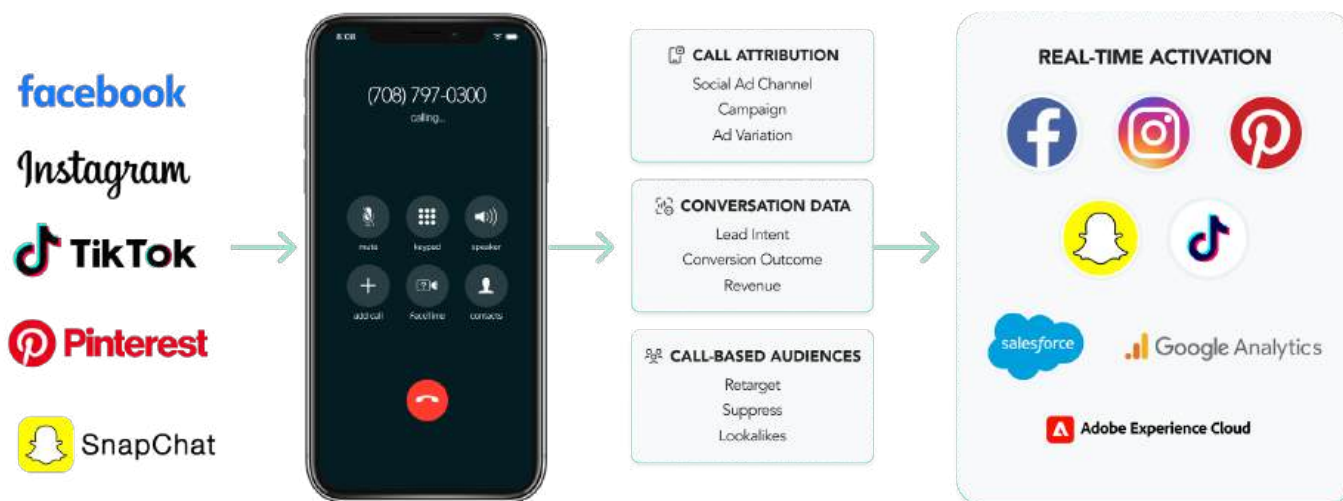


### Poor retargeting performance

Without data on call conversions, you spend budget retargeting customers who already converted and miss opportunities to retarget unconverted high-value leads.

# Optimize Social Media Ads with Complete Buying Journey Data

Invoca's solution uses AI to capture first-party data from phone calls and activate it across your marketing tech stack, including social media platforms, to optimize your social media advertising ROAS, prove your performance, and maximize revenue growth.



We offer more social media integrations than any other revenue execution platform. Some don't even have integrations with Facebook, let alone TikTok, Snap, and Pinterest. Others require that you use third-party software like Zapier for their "integrations" that limit the actions you can take with your data. Our no-code social media advertising integrations include:



Here's how to get more from your social ad investments with Invoca's social advertising integrations.

# Accurately measure online and offline conversions and revenue from social ads

With Invoca's social media ad platform integrations, you can accurately measure 100% of the leads and conversions your social ads drive over the phone. Invoca's AI automatically analyzes every phone call your campaigns drive to determine product interest, lead intent, conversion events, and more. Through the integrations, this data can be streamed to all your social ad platforms, giving you complete visibility into the role social advertising plays in the buying journey.

With this data, you can quickly test and learn which efforts drive the best results and see how your social media campaigns stack up against search and other channels that drive leads to call.

The image shows a mobile app interface for 'INVOKA CONVERSATION PROFILE'. It features a table of call data and three callout boxes. The table includes fields like Search Keyword, Google Click ID, Campaign, Web Visitor ID, Serviceable Address, Product in Cart, Calling Page URL, Caller ID, Interest Driver, Manager Escalation, Outcome, Agent, Mentioned Promotion, and Call Quality Score. The callout boxes highlight key benefits: understanding consumer intent, automatically measuring intent and conversions, and activating data across social ad platforms.

Field	Value
Search Keyword	"high speed internet"
Google Click ID	542186921
Campaign	Bundle & Save
Web Visitor ID	X854962
Serviceable Address	True
Product in Cart	Internet & TV
Calling Page URL	/checkout
Caller ID	404-464-0231
Interest Driver	Moving
Manager Escalation	False
Outcome	New service activation
Agent	Candace Yen
Mentioned Promotion	True
Call Quality Score	6.6/10.0

**Understand consumer intent, lead quality, and campaign attribution**

**Automatically measure intent, outcomes, and conversions to understand best-performing media**

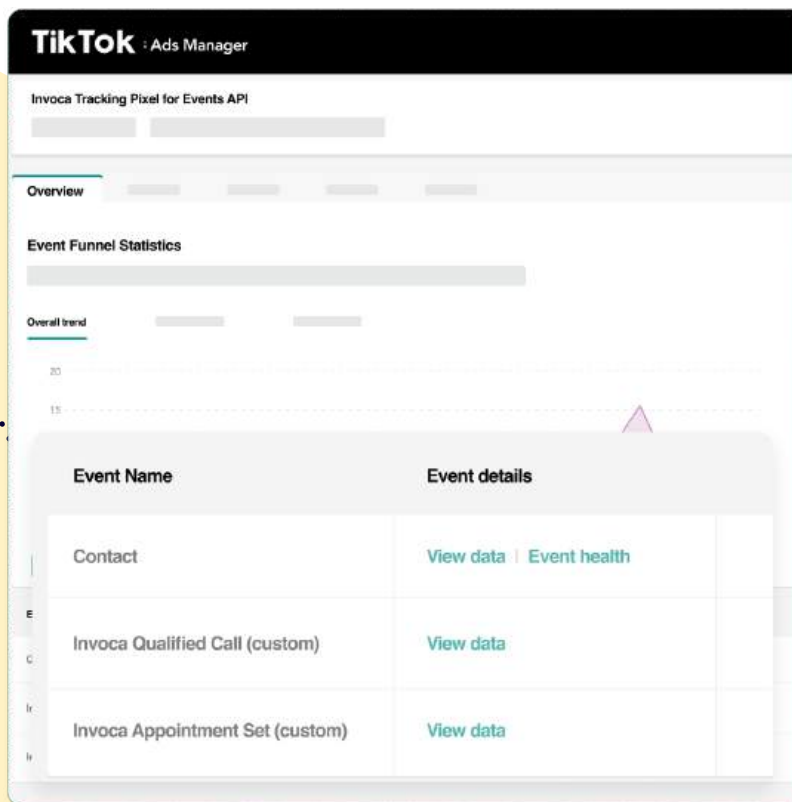
**Activate data across all your social ad platforms**

Best of all, you can finally get credit for every lead and conversion your campaigns drive across all digital platforms including paid search and social media. This means you get accurate ROAS and CPA metrics that you can use to defend your marketing budget. With our available CRM integrations, you also get direct revenue matchback that shows exactly how calls from your social ad campaigns contribute to the bottom line.

# Optimize social ads with call intent and outcome data

When you know which social media ads drive the most leads and conversions online and over the phone, you can optimize every ad to drive the best results and ROAS. Invoca's AI automatically detects caller intent and conversation outcomes, connects that data to revenue generated from the call in your CRM, and activates it all in your social media ad platforms so you can make more informed decisions to optimize for quality leads, conversions, and revenue.

With a complete picture of your performance that includes conversions that happen on the phone (or not!), you can pull back spend from ineffective campaigns and put more behind the ones that drive revenue.



# Improve retargeting and suppression

With Invoca, you can use what callers say on phone calls to retarget the right leads with the right ads across all of your social media ad platforms, increasing your conversion rates and ROAS.

Invoca's AI automatically captures if each caller is a lead, what their product interest is, if they converted on the call and more. Invoca passes that data to your social ad platforms to determine how to engage with each caller based on the intent and outcome of their conversations, including:



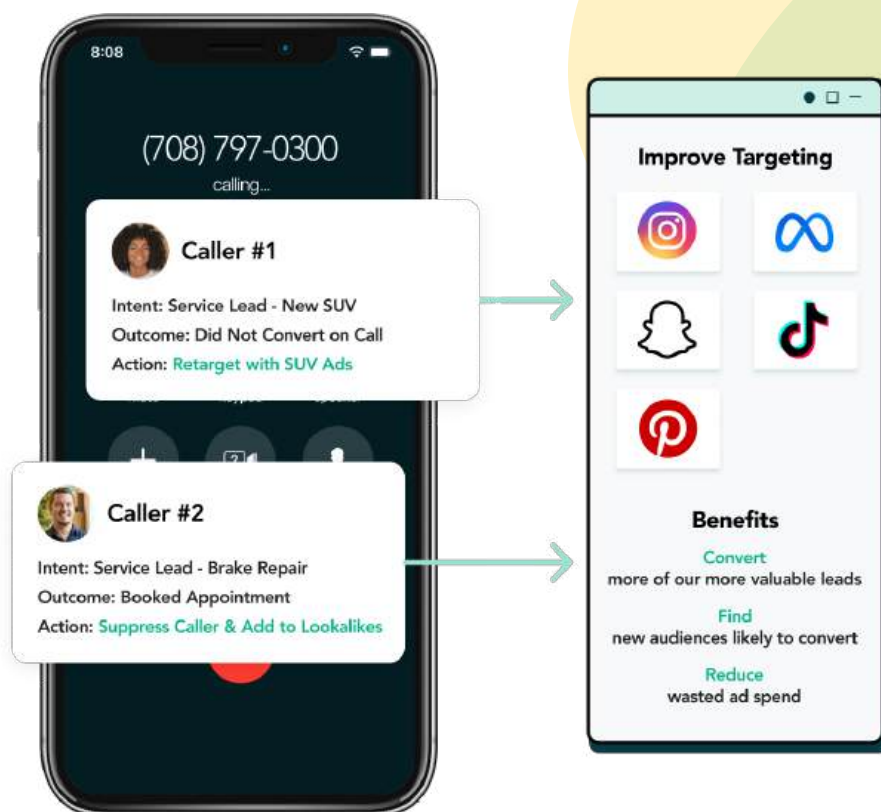
## Cross-Channel Retargeting

If a phone lead doesn't convert, you can use Invoca to automatically retarget them with social ads to get them to re-engage and convert. For example, if someone calls after engaging with your website or other channel and does not convert, you can retarget them with highly personalized social media ads to recapture their attention and get the conversion.



## Suppression

For callers who aren't leads or have already converted, you can exclude them from seeing your search and social ads so you don't waste ad budget targeting the wrong people.



## Build high-intent lookalike audiences

Leads that call your business often become your most valuable customers. With Invoca social ad integrations, you can feed conversion data from all of your calls — no matter what channel they originate from — to your social media platforms to create high-intent lookalike audiences that are more likely to become customers. By targeting high-intent audiences, you can decrease your CPA and significantly increase your social media ROAS.



### RESULTS

**100%**

Increase in attributed revenue from ad campaigns

**16%**

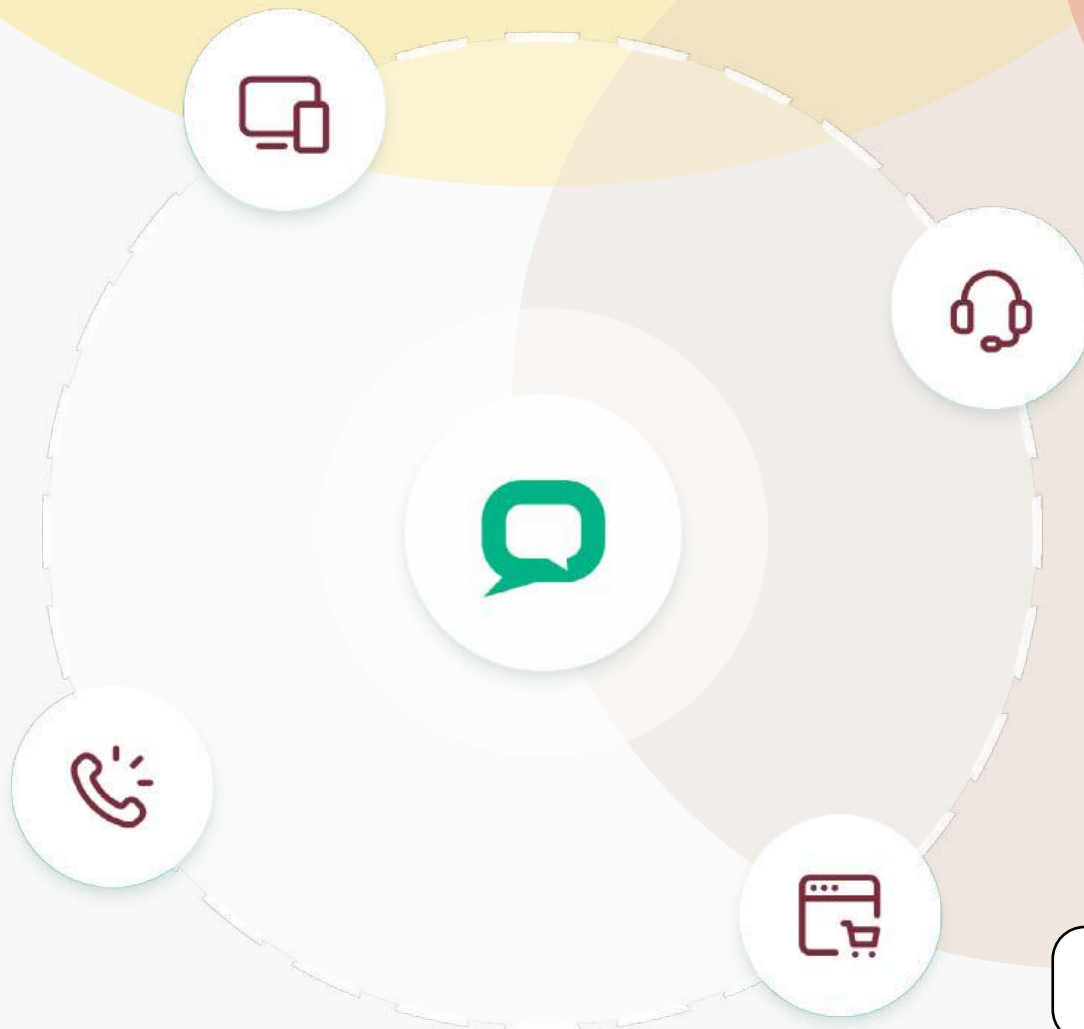
Increase in phone call conversion rate

“Leveraging Invoca’s social integrations has allowed us to gain more insights into campaign performance and consumer trends. With the ability to track KPIs and attribute to phone data, we’ve gained a deeper understanding of our audience across platforms.”

—  
**Taylor Aramburu**  
Digital Marketing Manager

## PLAY 4:

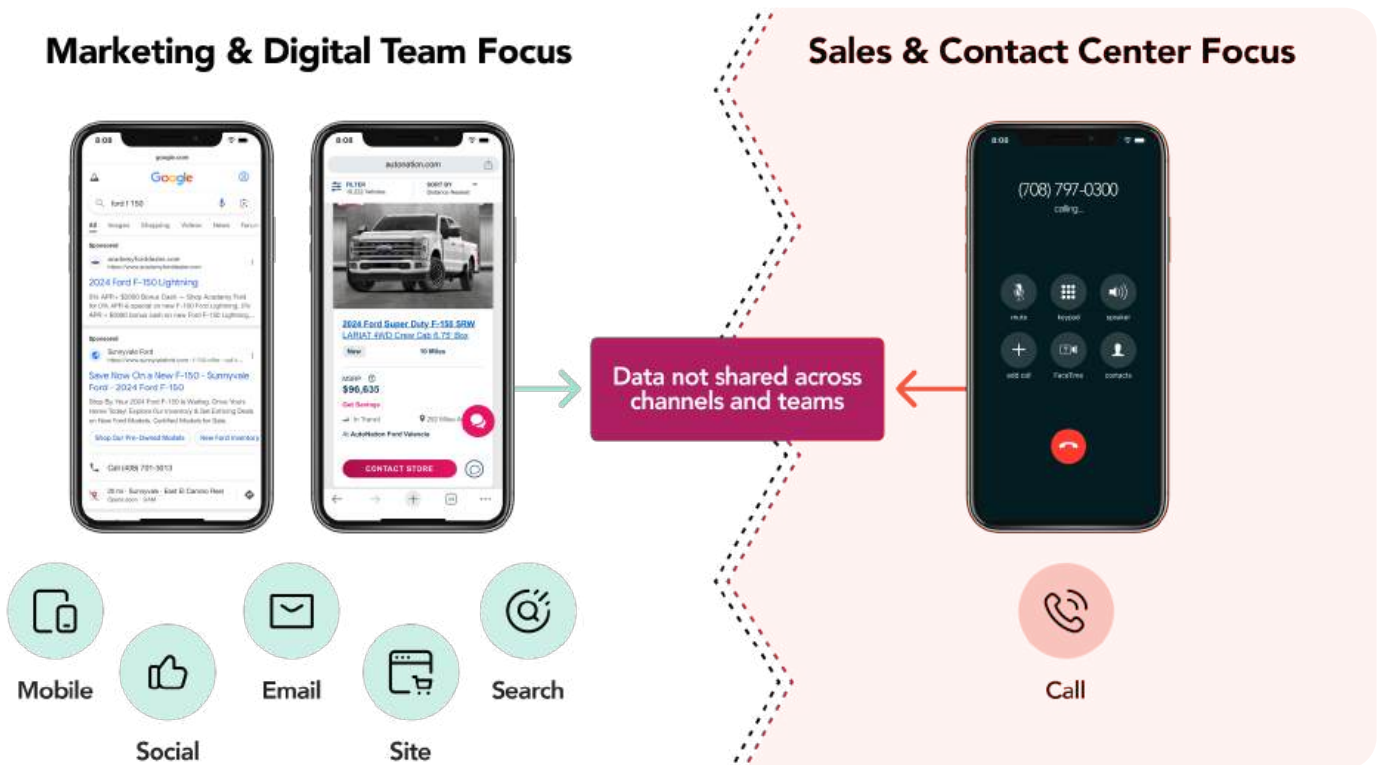
# Create a Seamless Online-to-Offline Buying Experience



[GO TO PLAY 5](#)

Marketing and sales leaders at B2C brands face a significant roadblock to creating buying experiences that drive revenue growth — they lack full visibility of the buying journey. In our recent State of B2C Revenue Execution Report, only 28% of marketing and sales leaders said they're very confident that they understand their customer's full buying journey. This results in a disjointed and frustrating buying experience that reduces conversion rates and revenue.

The problem lies in the inability to connect online engagements to offline actions that happen on the phone. In automotive, healthcare, home services, financial services, and other high-touch, high-stakes industries, consumers do much of their research online, interacting with brands across search, social media, display ads, websites, and more along the way.



Most marketers understand this part of the buying experience well. But when it comes time to set an appointment, get a quote, or make a purchase, many consumers will call to complete the process, creating a gap in data and visibility of the buying journey.

This leaves marketers in the dark. What drove them to call? Was it a bad website experience, or did they just want an expert to walk them through the purchase? Did they convert on the phone or drop out of the buying journey? Were they a hot lead driven away by a poor call experience?

Without the ability to connect the online journey to phone calls, you can't properly optimize any part of the experience.

# How Online-to-Offline Data Gaps Impact the Buyer Experience—and the Bottom Line



## Increased digital abandonment

You may know that your ad campaigns or website visits drive phone calls, and you may even know how many. But do you know why they abandoned the digital experience and called or what the call outcome was? Poor or broken digital journeys drive people who want to convert online to call. This is a bad experience that drives down online conversion rates. It also increases acquisition costs as converting low-value customers on the phone is more expensive than enabling them to buy online.



## Poor call experiences

The experience that customers get on the phone is just as important as the online experience that preceded the call, if not more so. People don't pick up the phone until they're ready to take action. Since this is likely their first point of human contact when making an important and expensive purchase decision, the call must inspire confidence and trust at every turn. Without access to real-time digital buyer journey data, calls are misrouted, transferred, and put on hold more often.



## Confusing marketing messaging

Is your marketing messaging resonating with your customers or confusing the daylights out of them? If you're missing information that customers are looking for online or presenting it in a way they don't understand, it can cause them to call or bounce altogether instead of converting on your website. You get a double-whammy of lost conversions and increased acquisition costs when you can't meet your customers where they are.



## Disjointed online-to-offline experiences

When customers call to complete a purchase, make an appointment, or get a quote, they have already done a lot of legwork online. If they had items in their cart or entered their information online and have to repeat it to the rep who answers the phone, it feels like starting all over again. This frustrates your customers and reduces conversion rates. It also takes more time for the agent to handle the call, reducing the time they can spend with high-value leads.

# Optimize the Online Experience with Offline Call Data

Invoca's revenue execution platform connects first-party customer data from phone calls to the digital interactions that drive them. This enables you to use data from calls to optimize the digital experience and diagnose digital abandonment. And that leads to happier customers and higher conversion rates.

## Accurately measure and decrease digital abandonment

With Invoca, you can accurately measure how many users leave the digital experience and convert on the phone or call and don't convert. You can also separate them from those who drop out of the buying journey altogether.

More importantly, you can discover why customers call and abandon the digital experience. You can see if high-value leads are calling to convert, or if your digital experience is driving non-revenue-generating calls like those from existing customers or leads asking questions that should be answered online.

When you can track down the exact pages that drive abandonment, you can optimize those experiences so more customers can self-serve and convert online and encourage high-value leads to call to increase the chances they'll convert.



# Analyze transcripts to diagnose and fix digital experience issues

Analyzing call transcripts and creating AI Signals to capture the words and phrases that flag broken online experiences can help diagnose where and why customers leave the digital buying journey. And while no one likes dealing with someone who just spent the past five minutes rage-clicking, there's a lot to learn from these less-than-happy callers. They may say things like:

“The promo code you sent me isn't working.”

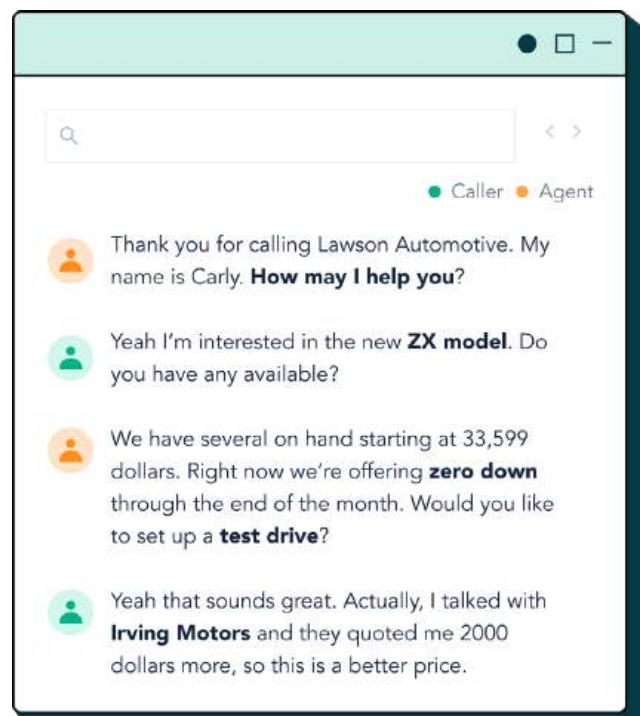
“I'm so frustrated! The link on your site is broken.”

“I keep trying to submit the lead form, but it's not working.”

“I'm ready to refinance, but I need some help with the application.”



For businesses already tracking web experience analytics with platforms like Contentsquare, Decibel, FullStory, and Optimizely, you can use Invoca's integrations to understand the role phone calls play in your digital experiences and quickly identify and fix frustrating website interactions to allow more customers to self-serve and convert online.

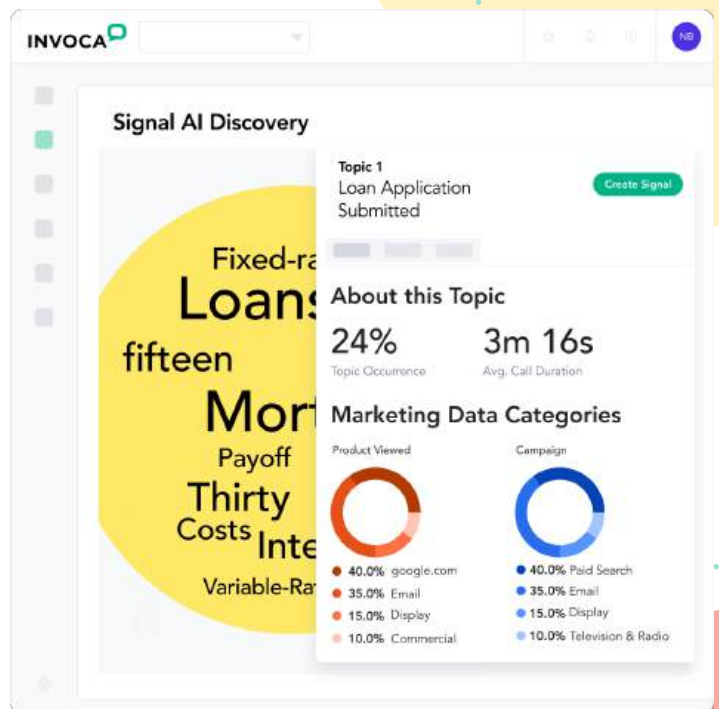


## Fine-tune messaging with voice-of-the-customer data

When your customers call, they tell you exactly what they want in their own words. With Invoca's conversation analytics AI, you can learn what resonates with your customers and what confuses them — all at scale so you can fine-tune your messaging.

You can also use tools like Invoca's machine learning-powered Signal AI Discovery that analyzes thousands of calls to “know the unknown” in your phone interactions.

With the ability to drill down into topics and listen to sample call recordings, you'll see the most common spoken words, find competitor mentions, nail down product interest, and view a wealth of voice-of-the-customer data that helps you create messaging and content that resonates with your customers.



### AI that tunes into the voice of your customers



With Invoca Signal AI Discovery, you can finally understand the macro and micro trends in your customer conversations to uncover customer behavior, motivations, trends, and outcomes. Not only will you validate what's known, but you'll uncover what's unknown in every conversation to troubleshoot, optimize, and improve every interaction and buyer journey. Your Signal AI Discovery insights are a blueprint to optimize marketing efforts and improve your customer experience.

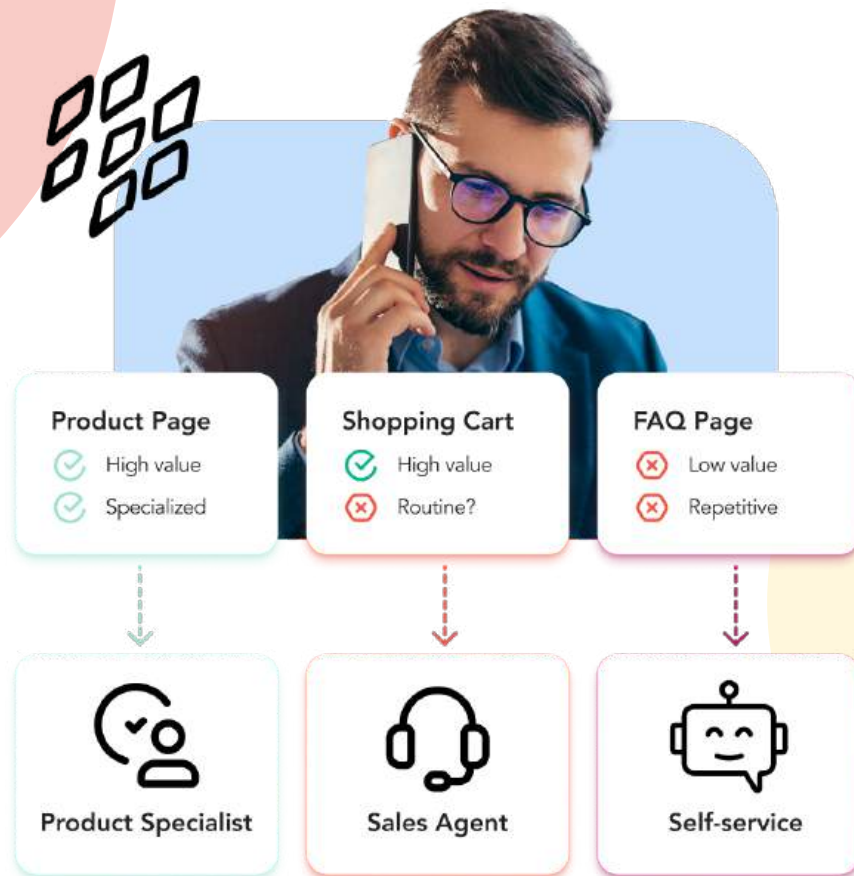
# Create Seamless Call Experiences with Digital Journey Data

Marketers don't think much about what happens once a lead calls, but call handling quality directly impacts your conversion rates and ROAS. With Invoca, the contact center can get a complete view of the digital customer journey to efficiently route calls and provide personalized experiences for every customer.

## Improve call handling with digital intent data

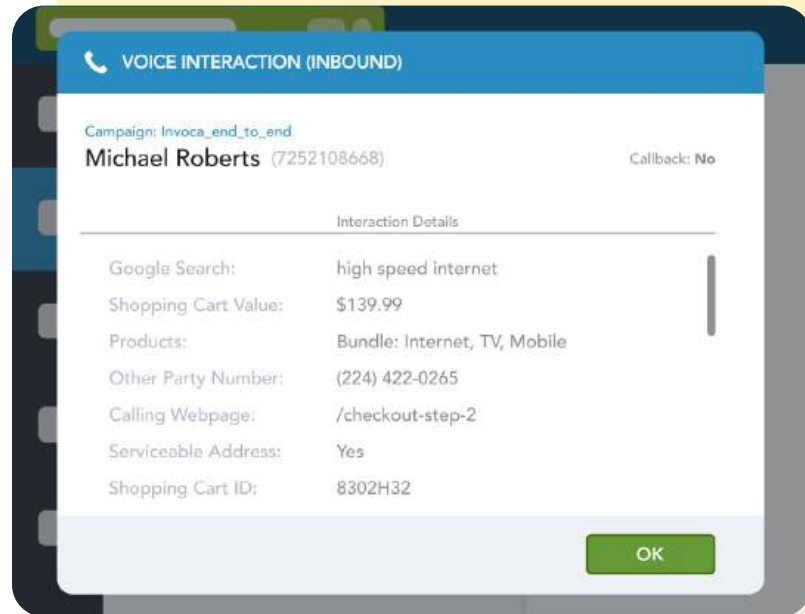
Reduce transfers and customer frustration by using digital journey data to manage customer interactions and route calls to the right agents and locations right away. When the buyer journey moves from digital to a phone call, Invoca's call routing connects the caller to the right place every time, even across multiple call centers or local branches.

For example, you can route calls that show high digital intent — e.g., they have items in their shopping cart — to your most experienced sales agents. Customers who are on a cancellation page can also be routed directly to a retention agent. Low-intent calls can be directed to online or automated resources, and existing customers can be automatically routed to customer service, freeing up sales agents' time and allowing them to convert more high-value customers.



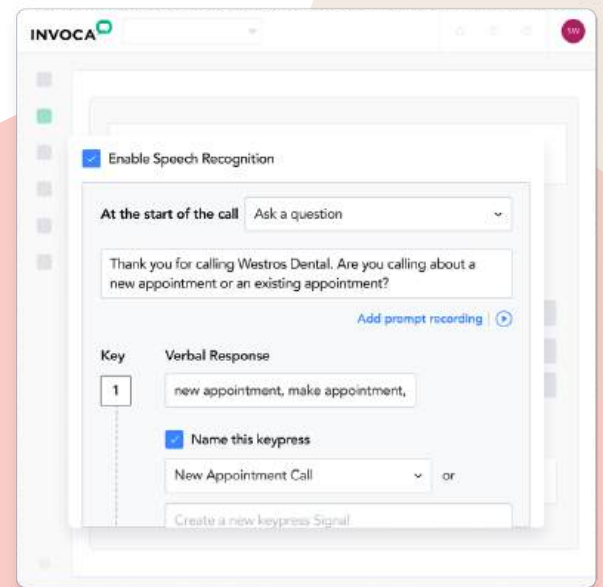
## Give agents digital journey context to provide seamless experiences

Give agents the digital journey context needed to personalize every call with Invoca PreSense. PreSense gives agents digital journey details in a convenient screen pop before the call begins. It enables them to provide personalized, efficient service that wows customers, reduces time-to-resolution, and increases conversion rates. PreSense integrates with modern contact center platforms like Five9, NICE inContact, Genesys, Salesforce, Amazon Connect, and others for seamless data that empowers agents.



## Easily build voice-activated IVRs

Convert more callers to customers by having IVRs route leads to the best agents and locations to assist them. Invoca's IVR software understands both voice and keypress responses, improving caller experiences and reducing abandon rates. Unlike traditional IVRs, you can easily configure Invoca conversational IVRs in minutes with no coding or help from IT. It also works with every phone system, so you can deploy them immediately without disrupting your business.



### RESULTS

**110%**

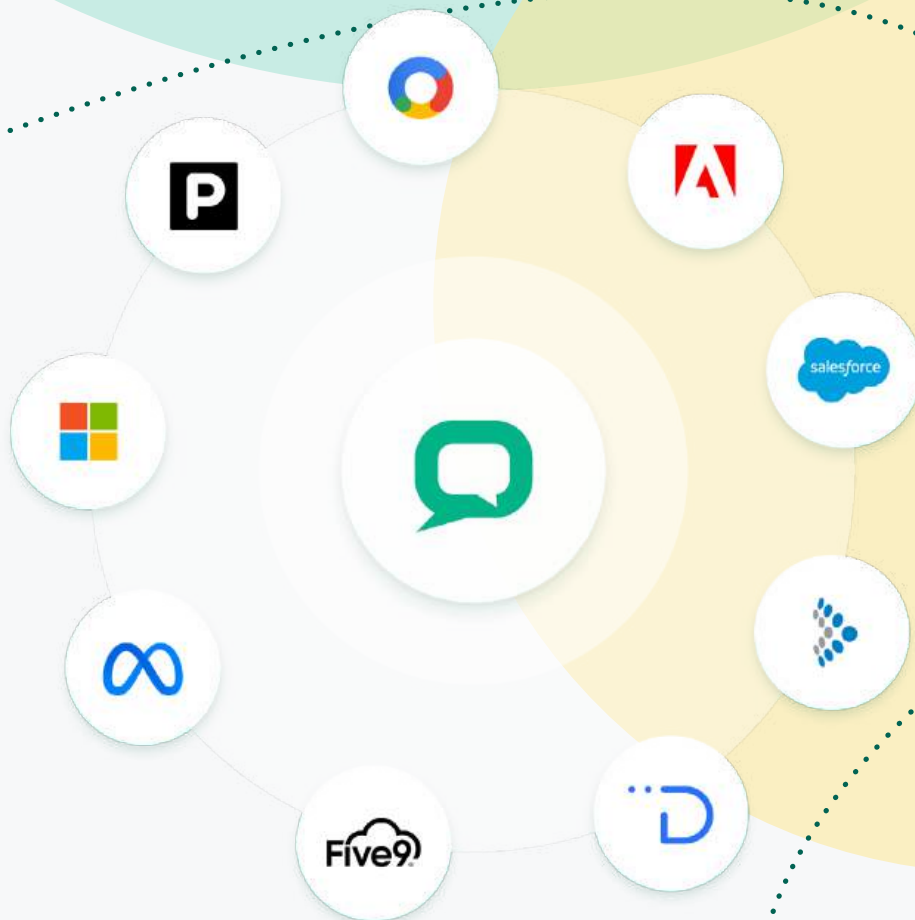
Improvement in sales agent close rates

“Being able to get an omnichannel view of the customer experience is invaluable. With Invoca, we can quickly identify issues in the buyer journey and correct them. It’s had a huge impact on our conversion rate.”

**Mark Loovis**  
Director Of Marketing Technology

**PLAY 5:**

# Integrate First-Party Data Across Your Tech Stack to Automate Results



The ability to access and take action on 1st-party data is more important than ever. The ever-looming end of third-party cookies and increasing regulatory pressure paint a dim picture of the future for third-party consumer data. At the same time, the walls around the data gardens are getting taller at the big adtech companies, reducing the ability for brands to use this data to make direct connections with consumers. Without access to a rich first-party data source, brand marketers are left in the lurch and at the mercy of a handful of advertisers.

The best source of 1st-party and zero-party consumer data brands have is often locked away in the millions of conversations the contact center has with leads and customers. When consumers call businesses, they say — in their own words — exactly why they called, what they want, what they need, and what their interests are. It's a 1st-party voice of the customer (VoC) data goldmine that many marketers can't access because it's locked away in the contact center.

Just having access to VoC data isn't enough, either. That data has to be analyzed at scale and seamlessly integrated across your martech stack to take action on it. We'll go over how Invoca's revenue execution platforms make that possible, but first, let's look at the consequences of letting 1st-party VoC data languish in the depths of your servers.

## What kind of data is it?



### 1st-party data

is collected from your audience via your organization's owned channels. This could include data from CRMs, website visitors, social media followers, email subscribers, transaction records, and phone calls.



### Zero-party data

is willingly and proactively shared by the customer with a company. It's information that the customer provides directly to your company, without any intermediaries or third parties involved.



### 3rd-party data

is purchased from an outside broker that did not play a role in collecting the data. Third-party data brokers often aggregate large-scale datasets from various websites to create consumer profiles.



# Missing 1st-Party VoC Data Reduces the Effectiveness of Your Martech Stack



## Reduced ROI on Tech

Your martech stack is a substantial investment, but the returns are only as good as the data you feed it. You need to stream data from every step of the buying journey across your martech stack to maximize the value you get from it. VoC data from phone calls is particularly important because it contains rich information on buyer intent, call outcomes, conversions, sentiment, and more. This data also comes when consumers are ready to buy — the most important step of the buying journey.



## Inefficient Optimization

Phone calls provide rich data on exactly which marketing efforts drive results. You can't optimize your ad spend to drive the highest-value leads without the ability to stream call data to your ad platforms, CRM, and DSP.



## Inaccurate Measurement

The more buying journey data points you can feed to your martech stack, the more accurate the actions you take on it will be. Without 1st-party data from phone calls, you're missing half of your potential buyer intent and conversion data that can be used to optimize ads, improve messaging, enrich customer profiles, and more. This can result in a disjointed buyer experience, inflated CPA, reduced ROAS, and underreported revenue.

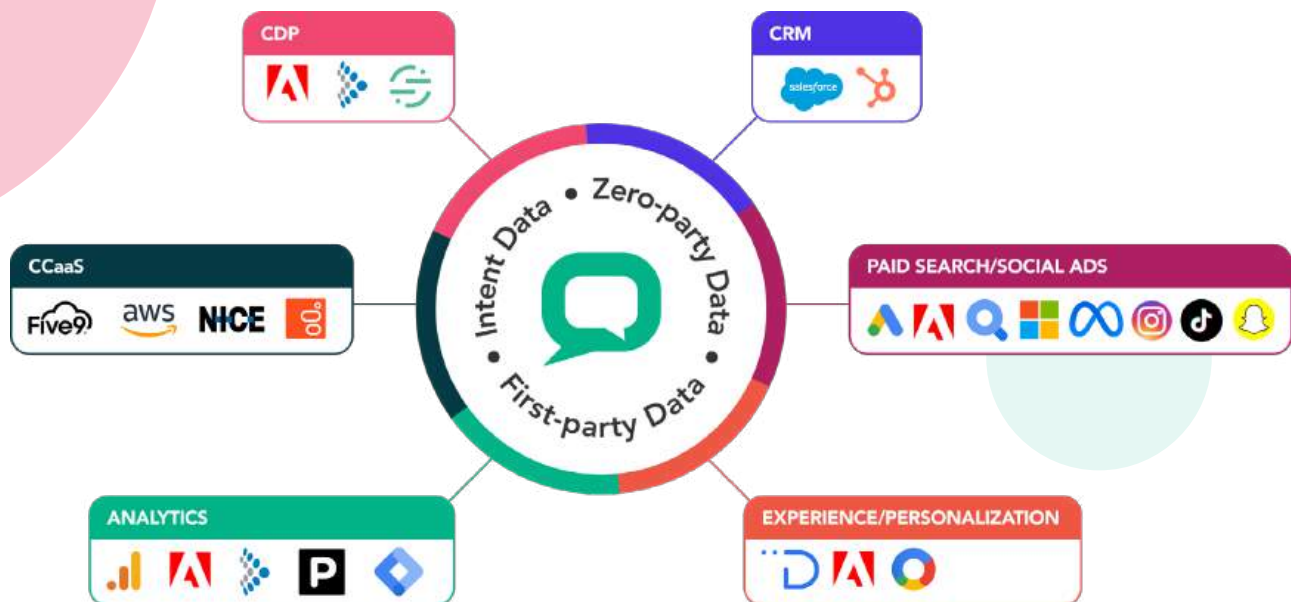


## More Dependence on 3rd-Party Data

Phone calls are your best source of rich 1st-party VoC data. Without it, you increase your reliance on 3rd-party data sources for targeting and ad optimization. Future-proofing the success of your marketing operations and reducing your exposure to data privacy compliance violations requires using all the 1st-party data you have.

# Automate Results With Invoca 1st-Party Data Integrations

Invoca's revenue execution platform acts as a hub for all of your 1st-party marketing and customer data. It enables you to gather data from across the digital journey, from search to social media to your website, and unify it with comprehensive data from phone calls. You not only see what channels, campaigns, and keywords drive phone calls, but you can stream the outcomes of those calls back to your martech platforms to automate the next best action.



This gives you a complete view of the buying journey in every platform. With Invoca's comprehensive library of no-code and low-code integrations, you can automatically unify online and offline data to optimize your marketing, create seamless customer experiences, enrich customer profiles, and reach new audiences that maximize revenue.

Here are some of the ways you can integrate all of your 1st-party buying journey data with Invoca's integrations.

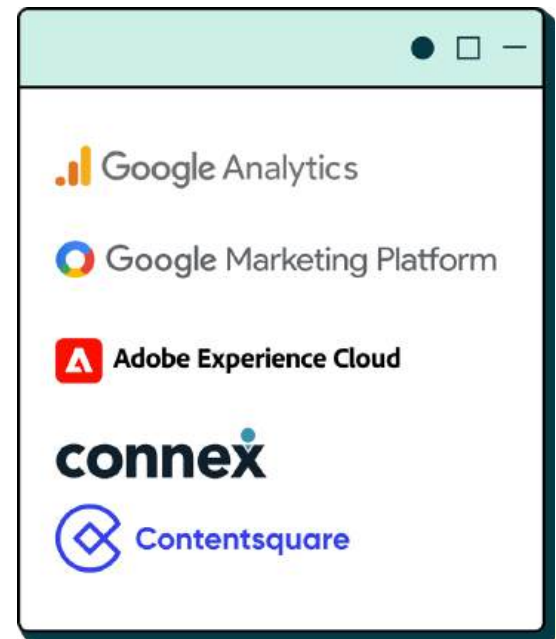
## More accurate analytics

With Invoca, you can finally unify 1st-party call data with digital data in your analytics platform to measure and attribute inbound calls with the same accuracy as online actions.

With Invoca's no-code and low-code web analytics integrations, you get full marketing attribution for every call (and conversion) your budget drives — just like you do for digital conversions. You can also measure other actions and call outcomes that signal buyer intent, product interest, and more.

Integrations with platforms like Google Analytics enable marketers to attribute every phone call conversion to the marketing source that drove it — down to the campaign, ad, and keyword. You get attribution whether a lead calls from an ad or a website visit because Invoca tracks the entire digital journey that drove the call and can stream that data to your web analytics platform.

Invoca has the most current and complete web analytics integrations available, including Google Analytics 4, Adobe Analytics, and Experience Cloud.

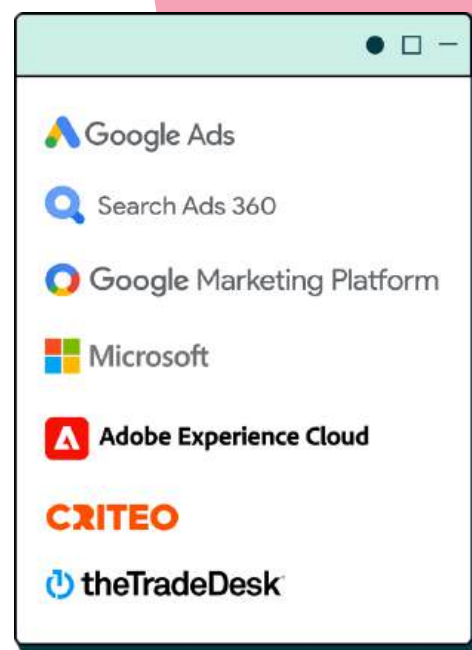


## Drive more ROI from paid media

With Invoca's digital advertising integrations, you can stream call data to virtually any ad platform in real time to get insight into which paid media efforts are working and which aren't.

This helps you spend more effectively, get more conversions, and increase performance across every channel. You can automate and optimize your keyword bidding with call conversion data, create high-value lookalike audiences, and more. Invoca offers integrations with a dozen ad platforms, including no-code integrations with Google Ads, Search Ads 360, Microsoft Ads, and DSPs like The Trade Desk and Criteo.

Google Ads is our most popular integration, and it's often the first one our customers activate — for good reason. By delivering call conversion data to Google Ads and using it with AI-powered, automated tools like Google Smart Bidding, our customers often see impressive results right away.

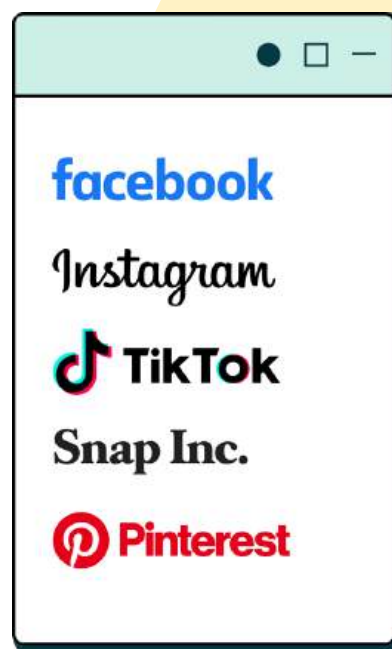


## Drive more leads from social ads

Invoca's revenue execution platform uses AI to capture 1st-party data from phone calls and activate it across your social media ad platforms to optimize your social media advertising ROAS, prove your performance, and maximize revenue growth.

Our no-code social advertising integrations are simple to implement, unlike other providers that make you use third-party software like Zapier, which limits the actions you can take with your data.

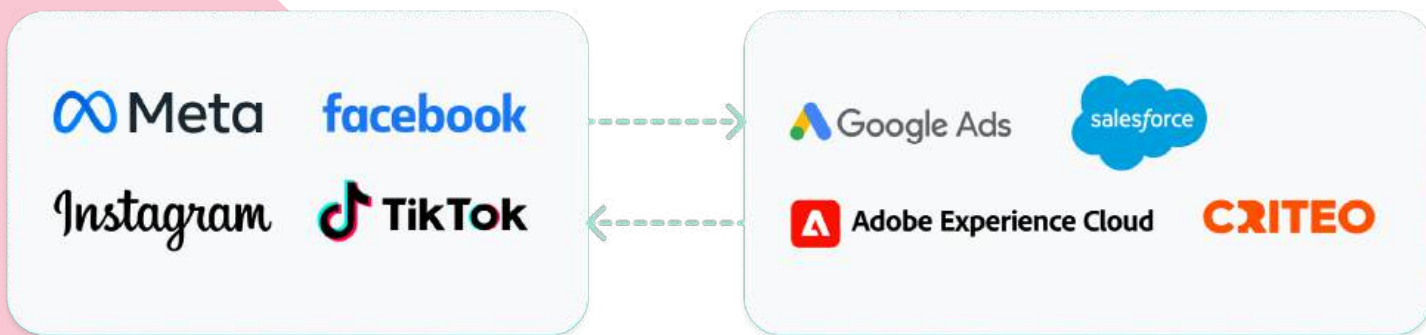
Our no-code social media advertising integrations include Facebook, Instagram, Meta Audience Network, TikTok, Snapchat, and Pinterest.



## Cross-platform optimization

With Invoca, you can use what callers say on phone calls to retarget the right leads with the right ads across all of your ad platforms, increasing your conversion rates and ROAS.

Invoca's AI automatically captures if each caller is a lead, what their product interest is, if they converted on the call and more. Invoca passes that data to your ad platforms to determine how to engage with each caller based on the intent and outcome of their conversations, including:



### Cross-Channel Retargeting

If a phone lead doesn't convert, you can use Invoca to automatically retarget them with ads to get them to re-engage and convert. For example, if someone called after engaging with a social media ad, search ad, display, your website, or other channel and did not convert, you can retarget them with highly personalized social media ads to recapture their attention and get the conversion.



### Suppression

For callers that aren't leads or already converted on the call, you can exclude them from seeing your search and social ads so you don't waste ad budget targeting the wrong people.

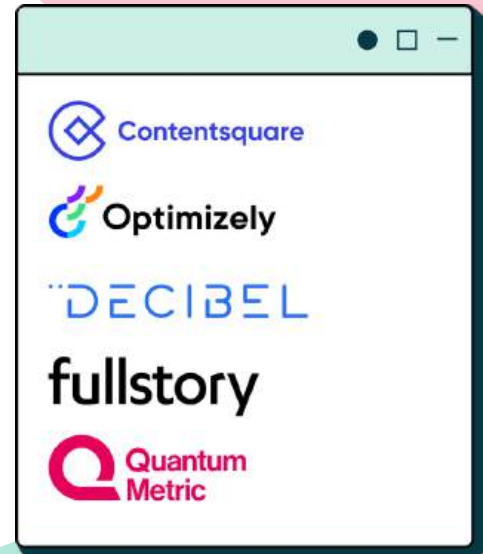
## Improve online customer experiences

If improving the digital buying experience is one of your priorities, you've likely invested in web analytics and experience tools. You can get even more value out of those platforms by integrating them with conversation intelligence data.

For example, to more precisely pinpoint where dropoff is occurring on your website, you can integrate Invoca call data with customer experience analytics platforms like Contentsquare, Optimizely, Decibel, Fullstory, or Quantum Metric. By utilizing web experience tools and features like session replays, you can understand more deeply the purchase paths that drive phone calls.

This enables you to fix breaks in the online conversion funnel and optimize for certain purchases where driving a phone call presents significant revenue opportunities.

The result is that every customer gets the seamless experience they deserve, and you drive more revenue and higher conversion rates.



## Enrich customer data & connect revenue to calls

Your CRM and CDP keep track of every touchpoint and interaction throughout the entire customer lifecycle, but most marketers don't track the most critical touchpoint — phone calls. With Invoca's no-code CRM integrations with platforms like Salesforce and Hubspot, you can automate lead creation and enrich customer profiles in your CRM with customer conversation and phone conversion data. Closed-loop reporting allows you to track leads all the way to closed or lost, so you know exactly which calls are converting for better optimization.

This will allow you to accurately segment prospects into campaigns that align with their interests, nurture and upsell existing customers, and improve your retargeting and ad suppression tactics.

Invoca also offers specialized integrations like Freshpaint for healthcare users and VinSolutions Connect for automotive dealerships.



**Viasat** 

### RESULTS

**74%**

Increase in Call Conversion Rate

“With Invoca, we can integrate and pass conversation data between different systems to close the loop and get a 360-degree perspective of the customer journey, how we reach our customers, and the different touchpoints along the way.”

—  
**David Salcido**  
Director of Digital Marketing

**INVOCA**<sup>®</sup> 

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