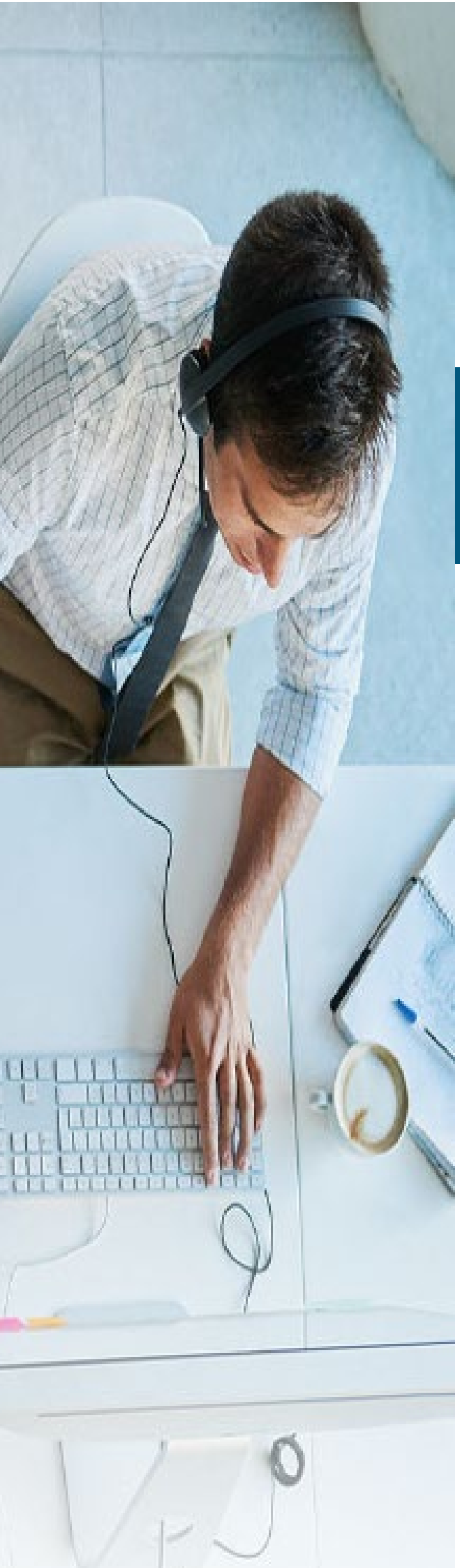

CALL RECORDING

Conversation Analytics 101

Intro to AI Tools

Quick Reference Guide

MOMENTUM

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Table of Contents

1. Overview

Call Recording **Conversation Analytics** turns customer conversations into structured, searchable insights that help teams improve customer experience, coach agents, reduce risk, and grow revenue.

Today, many deployments start with **voice calls** (speech). Call Recording is being developed to expand into **omni-channel** analysis so the same insight framework can apply to **chats, emails, and tickets** when those channels are enabled in your environment.

1.1 What Conversation Analytics delivers

Conversation Analytics helps you answer questions like:

- *Which conversations are "at risk" and need attention right now?*
- *Why are customers dissatisfied, and what topics are trending?*
- *Which objections and competitors are coming up most often in sales calls?*
- *Are agents following the right process and meeting quality standards?*
- *What changed this week, and where should we focus coaching?*

It does this by generating **AI-powered insights** from each conversation and making them available in:

- **Conversation details** (per-conversation insights + explanations)
- **Dashboards** (trends, averages, distributions, drilldowns)
- **Search & filters** (e.g., "CSAT < 3", "Competitor mentioned = Yes")
- **Reports/exports** (where enabled)

1.2 Who benefits

Conversation Analytics is commonly used by:

- **Customer Support & CX leaders**: reduce escalations, understand top drivers of dissatisfaction, track CX metrics.
- **Supervisors & team leads**: coach agents using conversation-level evidence and explanations.
- **QA teams**: scale evaluations with automated QA and structured scorecards.
- **Sales leaders**: identify objections, competitor mentions, deal signals, and next actions.
- **Operations & compliance**: spot risk patterns, ensure policy adherence, and support audits (when enabled).

1.3 What makes Call Recording different

1) Insights are configurable (not one-size-fits-all)

Call Recording supports both:

- **Prebuilt insights** (ready to enable)
- **Custom insights** you define for your business (e.g., Hospitality: reservation dates, nights, VIP status)

2) Insights come with explanations

In addition to a structured value (score/category/date/text), Call Recording can capture an **explanation** that helps humans understand *why* the AI produced that result.

This is especially useful for:

- QA reviews and coaching
- debugging or tuning insight definitions
- building trust with stakeholders

3) Insights flow through the same system surfaces

Once an insight is stored in a structured way, it can be consistently used across:

- dashboards (including clickable buckets for drilldown)
- conversation details
- advanced search and filtering

1.4 Where to go next

If you want a quick mental model of how it works end-to-end, start here:

- Conversation Analytics Lifecycle
- Key Concepts
- Quick Start: First 7 Days

If you are an administrator looking for setup steps and configuration, see the **CR Admin: Conversation Analytics Guide** (separate document).

2. Capabilities at a Glance

Call Recording Conversation Analytics can generate a wide range of **AI-powered insights** from conversations. Insights can be **prebuilt** (ready to enable) or **custom** (defined by your organization).

Note: Exact capabilities depend on your deployment and enabled channels/features.

2.1 Conversation understanding

These insights help users quickly understand what happened and why.

- **Conversation (Call) summarization**
- concise summary
- key points and next actions
- **Topics**
- what was discussed (multi-label, trendable)
- **Sentiment**
- overall sentiment and/or sentiment over time
- **Reason and outcome**
- why the customer contacted you (reason)
- what happened (outcome / resolution)

2.2 Customer experience insights (CX)

These insights help quantify customer experience and spot problems early.

Common examples include:

- **CSAT** (Customer Satisfaction) – 1–5 score with explanation
- **NPS / NES** (where enabled)
- **Top issues reported**
- **Issue resolution**
- **Escalation reason**
- **Churn risk** (risk scoring, categories, or rationale)

2.3 Sales insights

These insights help sales teams understand pipeline signals and coaching opportunities.

Examples include:

- **Lead score**
- **Lead stage**
- **Deal amount** (where expressed in the conversation)
- **Competitors mentioned**
- **Top objections**
- **Pain points**
- **Urgency level**
- **Next actions**
- **Sales lost reason**
- **Missed opportunity indicators**

2.4 Quality assurance (Auto QA)

Auto QA supports structured evaluation against a rubric/scorecard, such as:

- compliance / required statements
- script adherence
- empathy and communication skills
- resolution behavior

Auto QA outputs can be used for:

- QA dashboards (distribution, trends)
- coaching workflows
- audit support (where enabled)

2.5 Custom insights for your industry

Beyond prebuilt insights, you can create tenant-specific insights such as:

- Hospitality:
- Room reservation start date
- Total nights
- VIP status
- Healthcare:
- Appointment date/time
- Insurance type
- Follow-up requirements
- Field services:
- Service address
- SLA window
- Parts required

The key idea is consistent:

> **Define what you want to extract → store it in a structured field → use it in dashboards/search.**

2.6 What an “insight” looks like in Call Recording

An insight typically includes:

- a **structured value** (number, date, category, text)
- an **explanation** (short rationale grounded in the conversation)

This pattern supports both: - analytics (dashboards, filtering, reporting) - human review (trust, QA, coaching)

To understand how insights are produced and stored, see: - Custom Fields and Metrics - AI Tasks and Prompts

3. How It Works

3.1 Conversation Analytics Lifecycle

This page explains the end-to-end flow from raw conversations to dashboards and searchable insights.

High-level flow

At a high level, Conversation Analytics follows this pipeline:

```
Conversation content
  ├─ Voice calls → Transcription → Transcript
  └─ Text channels (chat/email/tickets) → Normalized thread text
                ↓
          AI Tasks (enabled)
                ↓
       Custom Fields (stored results)
                ↓
Conversation Details · Dashboards · Search
```

Step 1: Collect conversation content

A **conversation** can include:

- a voice call recording (audio)
- a chat conversation
- an email thread
- a ticket with messages/notes

Call Recording associates the content with conversation metadata (agent, queue/team, timestamps, direction, etc.) so you can filter and segment analysis later.

Step 2: Convert to analyzable text

For **voice calls**, Call Recording uses **transcription** to produce a text transcript.

For **text channels**, Call Recording analyzes the conversation thread directly (when enabled).

> If there is not enough text content, some insights may be skipped or returned as “unknown / insufficient evidence.”

Step 3: Run AI Tasks

An **AI Task** is a purpose-specific analysis definition that:

- reads the transcript/thread text (and optionally metadata)
- applies AI instructions (a prompt)
- produces structured outputs

AI Tasks can be enabled/disabled and can be limited to certain conversations using **filters** (e.g., inbound calls longer than 15 seconds).

See: - AI Tasks and Prompts - Filters and Eligibility

Step 4: Store results in Custom Fields

Call Recording stores insight outputs in **Custom Fields**, such as:

- CSAT (number)
- Sentiment (category)
- Top issue (multi-select)
- Next action (text)
- Reservation date (date)

Because results are stored in structured fields, they can be consistently used across the product:

- dashboards and trend charts
- drilldowns via clickable buckets
- advanced search and filtering

See: - Custom Fields and Metrics

Step 5: Use insights in day-to-day workflows

Once stored, insights become usable signals for different teams:

- CX leaders: trend CSAT and top issues
- supervisors: drill into low scores and coach with evidence
- QA teams: monitor Auto QA distributions
- sales: track objections and competitor mentions

For examples, see: - Use Cases

3.2 Where Insights Appear

Conversation Analytics results show up in several places so different roles can take action quickly.

1) Conversation details

For an individual conversation (call/chat/email/ticket), users can view:

- the transcript/thread
- extracted insight values (scores, categories, entities, summaries)
- **explanations** that justify the extracted values

This view is ideal for:

- coaching and QA reviews
- investigating a specific customer issue
- validating whether an insight definition matches your business expectations

> **Tip:** Explanations are designed to help reviewers understand the *why*, not just the final score/category.

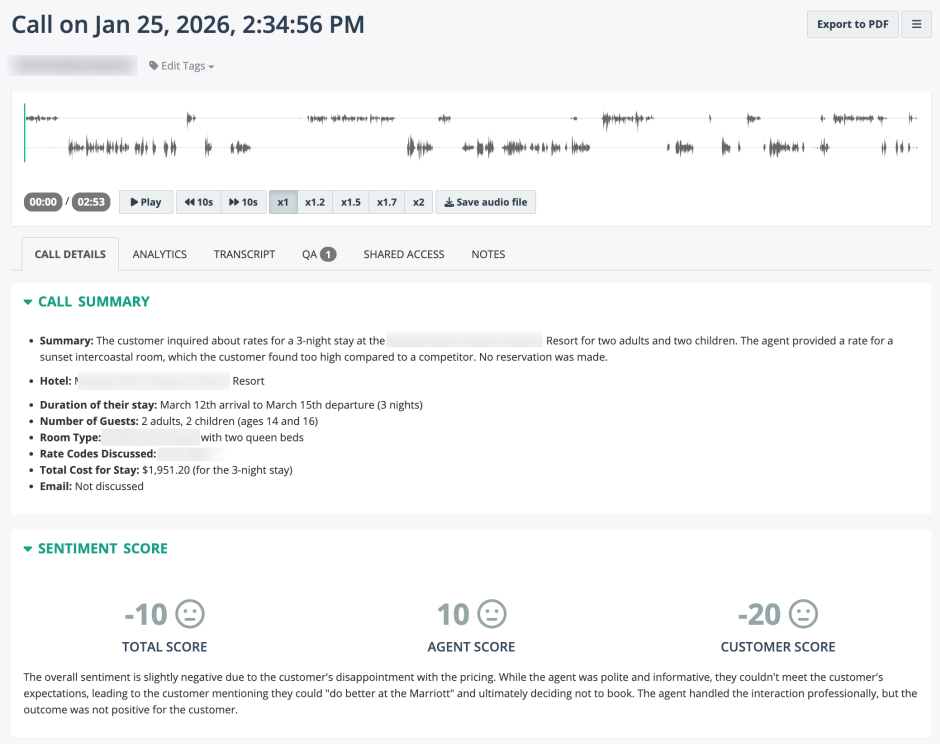

Figure: Call Details view with AI-generated summary. The Analytics tab displays extracted values such as CSAT score and sentiment along with explanations.

2) Dashboards

Dashboards are built from stored insight values (Custom Fields) and typically include:

- trend lines over time
- averages (for numeric metrics like CSAT)
- distributions (e.g., % dissatisfied / neutral / satisfied)
- breakdowns by team/agent/queue (where enabled)

A key workflow is **drilldown**:

- click a bucket (e.g., “Dissatisfied”) to navigate to the conversations behind it
- review a sample of those conversations with explanations
- take action (coaching, process changes, knowledge base updates)

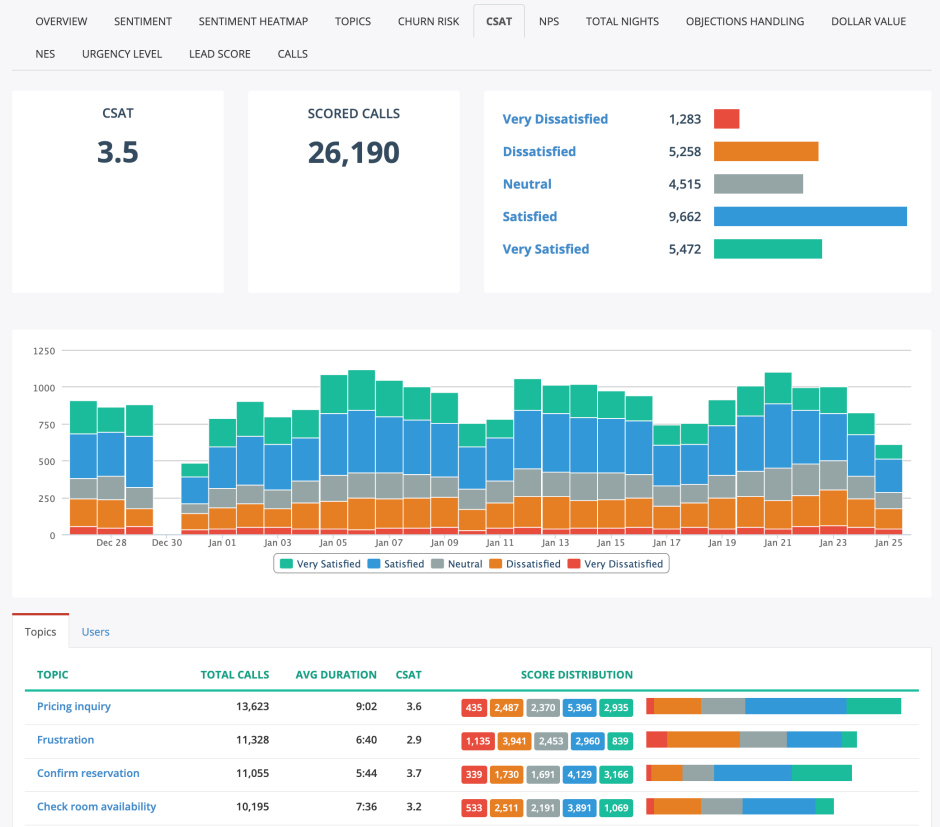

Figure: CSAT Dashboard showing score distribution, trend over time, and per-user breakdown. Click any bucket to drill down to matching conversations.

3) Search and filters

Users can search and filter conversations using insight values, for example:

- **CSAT < 3**
- **Churn risk = High**
- **Competitor mentioned = Yes**
- **Topic contains “Billing”**
- **Sentiment = Negative**

Because insights are stored as structured fields, you can filter precisely (ranges, categories, dates), not just keyword search.

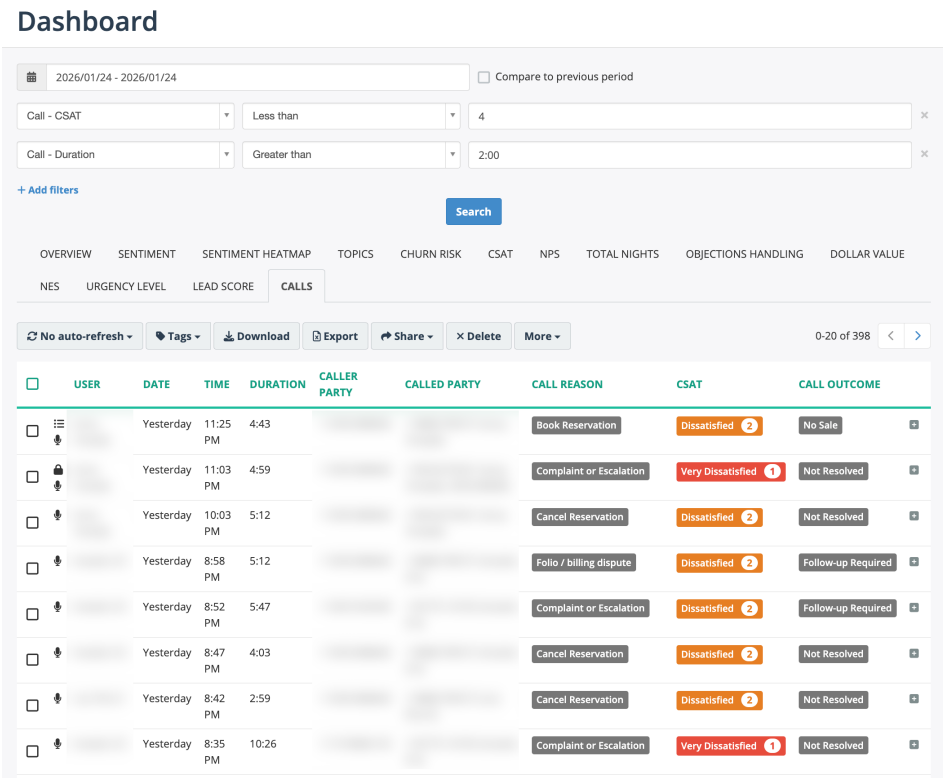

Figure: Search results filtered by insight values. Users can combine filters (date range, CSAT score, sentiment, etc.) to find specific conversations.

4) Reports and exports (when enabled)

Some deployments enable reporting or exporting insights for:

- operational reporting
- downstream BI
- integrations and automation

Reports generally work best when insights are stored in well-defined fields with consistent types and allowed values.

Next: How to interpret and validate results

If you are evaluating or rolling out insights, you'll want to understand quality expectations and best practices:

- Trust, Quality, and Expectations

3.3 Trust, Quality, and Expectations

Conversation Analytics uses AI to interpret human conversations. AI results are powerful, but they are **probabilistic**—meaning you should plan for validation, calibration, and continuous improvement.

This page sets expectations and describes practical ways to build trust in insight outputs.

AI outputs are structured, but not absolute truth

AI insights (scores, topics, classifications, extracted entities) are generated by analyzing the text of a conversation. Results can vary based on:

- transcript quality (especially for calls)
- missing context (e.g., a follow-up happened outside the conversation)
- ambiguous phrasing
- business-specific definitions (what “resolved” means to you)

The goal is to produce **useful, actionable signals**, not perfect judgments in every individual case.

Why explanations matter

Call Recording commonly pairs a value with an **explanation** that:

- references evidence from the conversation
- summarizes why the score/category was chosen
- helps supervisors and QA reviewers confirm correctness quickly

This supports: - faster human review - more transparent coaching - easier tuning when you need to adjust definitions

Recommended validation approach

A simple approach that works well for most organizations:

1. **Start with a small set of insights**
2. Example: summarization + sentiment + CSAT
3. **Sample and review results**
4. review a handful of conversations per team/queue
5. check both the value and explanation
6. **Calibrate definitions**
7. adjust thresholds, allowed values, or insight rules if needed
8. **Roll out gradually**
9. expand to more teams once you trust consistency

Handling “unknown” or insufficient evidence

Some conversations do not contain enough evidence to compute an insight reliably (too short, unclear, missing transcript). When this happens, it’s often better to return:

- **Unknown / Not enough evidence**
- or omit a value (depending on your configuration)

This prevents misleading analytics.

Tips for consistent, trustworthy insights

Even without deep AI expertise, administrators can improve consistency by:

- keeping scoring scales and definitions explicit (e.g., CSAT 1–5)
- using clearly defined dropdown options for classifications
- setting filters to exclude conversations that should not be analyzed (e.g., < 15 seconds)
- validating before enabling insights broadly

Where to find configuration steps

This document is conceptual by design. For step-by-step configuration and testing workflows, see:

- **Conversation Analytics – Administration Guide** (tenant configuration)
- **Conversation Analytics – Platform Setup & Operations Guide** (platform/operator configuration)

Next: Key concepts

If you want a deeper understanding of the core building blocks:

- Custom Fields and Metrics
- AI Tasks and Prompts
- Filters and Eligibility

4. Key Concepts

4.1 Conversations and Data Sources

In Call Recording, a **conversation** is a single customer interaction that can be analyzed to produce insights. Depending on your deployment, a conversation may be:

- a **voice call**
- a **chat** conversation
- an **email** thread
- a **ticket** with message history

> In some parts of the product UI, you may still see “call” used for voice-specific views. The broader term “conversation” is used here to support omni-channel analytics.

What makes a conversation analyzable

To analyze a conversation, Call Recording needs:

1. **Content**
2. voice calls: a recording that can be transcribed
3. text channels: message/thread text
4. **Metadata** (recommended)
5. time and duration
6. direction (inbound/outbound), where applicable
7. agent/team/queue identifiers
8. tags and other business context

Metadata enables segmentation and filtering in dashboards and search.

Common data sources (examples)

Call Recording deployments often integrate with:

- contact center platforms (voice recordings and call metadata)
- chat platforms (messages, timestamps, participants)
- ticketing systems (ticket threads, status changes)
- email systems (thread text and headers)

> The exact connectors and ingestion methods depend on your environment and are described in the Platform Setup & Operations Guide (for operators) and the Administration Guide (for tenant admins).

Why “conversation” is the right unit

Using a common unit across channels provides consistency:

- the same insight (e.g., topic, sentiment) can apply to calls, chats, and tickets
- dashboards can show trends across channels
- search filters work the same way (e.g., “High churn risk”)

Next: transcripts and threads

To understand how Call Recording turns content into analyzable text:

- Transcription and Text Threads

4.2 Transcription and Text Threads

Conversation Analytics needs text to analyze. For voice calls this comes from **transcription**; for text channels it comes from the **message/thread text**.

Voice calls: transcription

For calls, Call Recording converts audio into a **transcript**:

- a time-ordered text representation of what was said
- often including speaker turns (agent vs customer)
- sometimes including timestamps (depending on configuration)

Why transcription quality matters

AI insights depend on what the model “sees” in the transcript. Common factors that influence quality include:

- background noise or poor audio
- overlapping speech
- accents and domain-specific vocabulary
- incorrect speaker attribution

If the transcript is incomplete or inaccurate, insight quality may degrade.

Multi-lingual support

Call Recording supports conversations in multiple languages:

- **Transcription engines** support multiple languages and can auto-detect the spoken language
- **AI models (LLMs)** are multilingual and can analyze transcripts in their original language
- **Optional translation** to English is available for reviewers who prefer to read transcripts in English

When the source language differs from the reviewer's preferred language, the system can translate both the transcript and the AI-generated insights (such as summaries and explanations).

Text channels: threads and messages

For chats, emails, and tickets (when enabled), Call Recording analyzes the text directly:

- chat messages in order
- email thread content
- ticket messages/notes

For accurate analysis, it helps to preserve:

- who said what (agent vs customer)
- message ordering and timestamps
- relevant metadata (queue, tags, status)

Minimum content requirements

Some conversations may be too short or lack enough evidence for certain insights. In those cases, Call Recording may:

- skip running a task (if filters exclude it)
- produce “unknown / not enough evidence”
- produce partial insights (depending on the task)

Next: how results are stored

Once AI extracts insights from text, results are stored in structured fields:

- Custom Fields and Metrics

4.3 Custom Fields and Metrics

In Call Recording, **Custom Fields** are where insight results are stored. Storing insights in structured fields is what enables:

- dashboards and trend charts
- drilldowns (click a bucket → see matching conversations)
- precise search and filtering (e.g., CSAT < 3)
- consistent reporting

What a Custom Field represents

A Custom Field can store one piece of information about a conversation, such as:

- **CSAT score** (number)
- **Sentiment** (dropdown category)
- **Top issue** (multi-select category)
- **Next action** (free text)
- **Reservation start date** (date)

Most organizations use Custom Fields for both:

- **human-entered data** (manual tags, dispositions)
- **AI-extracted data** (AI insights)

Common field types (and when to use them)

Choose the field type based on how you want to analyze and filter the data.

- **Number (integer/decimal)**
- best for scores, amounts, durations, counts
- supports ranges and thresholds (buckets)
- **Choice / dropdown**
- best for classifications with a controlled vocabulary
- supports consistent dashboard grouping and filtering
- **Date**
- best for extracted deadlines, booking dates, follow-ups
- **Text**
- best for summaries, free-form notes, extracted phrases
- can be searchable but is harder to aggregate than structured types

Thresholds and buckets (for metrics like CSAT)

Numeric fields can include **thresholds** that convert raw values into labeled buckets with colors.

Example for CSAT (1–5):

- 1 → Very Dissatisfied
- 2 → Dissatisfied
- 3 → Neutral
- 4 → Satisfied
- 5 → Very Satisfied

These buckets can power dashboards like:

- distribution by bucket
- drilldowns: click “Dissatisfied” → view those conversations

Display groups (where fields appear in conversation details)

Custom Fields can be grouped for readability in the conversation details view, for example:

- CX Metrics (CSAT, NPS, churn risk)
- Sales Metrics (lead score, competitors)
- QA (Auto QA results)

This helps users find relevant insight values quickly without scrolling through an unorganized list.

How Custom Fields connect to AI Tasks

AI Tasks can write values into Custom Fields. The mapping is explicit:

- the AI Task outputs an attribute (e.g., `csat`)
- Call Recording stores the value in the chosen Custom Field (e.g., “CSAT”)

See: - AI Tasks and Prompts

Next: how insights are extracted

To understand how Call Recording produces values (and explanations) from conversations:

- AI Tasks and Prompts

4.4 AI Tasks and Prompts

An **AI Task** is the unit of AI analysis in Call Recording.

Think of an AI Task as:

- a specific “job” that analyzes a conversation (e.g., summarize, score CSAT, detect topic)
- a definition of what the AI should extract and how results should be stored

What an AI Task contains (conceptually)

An AI Task typically includes:

1. **Prompt**
2. instructions telling the AI what to do
3. expected output format (often JSON for structured results)
4. **Output mapping**
5. which extracted attributes are stored into which Custom Fields
6. **Filters (optional)**
7. which conversations the task should apply to (e.g., inbound only, duration > 15 seconds)
8. **AI engine selection**
9. which model/provider runs the task (varies by deployment)

> Administrators enable and configure AI Tasks. End users consume the results in dashboards, search, and conversation details.

One task, one purpose (recommended)

AI Tasks are most maintainable when each task does one focused job, such as:

- CSAT scoring
- sentiment classification
- topic extraction
- call reason and outcome categorization
- conversation summarization

In some cases, a single task may output multiple related fields at once (e.g., reason + outcome + resolution notes).

Output format: values + explanations

A best practice in Call Recording is to extract:

- the **value** (score/category/date/text)
- plus an **explanation** that helps a human reviewer understand why

Example (conceptual):

```
{
  "csat": {
    "value": 2,
    "explanation": "Customer expressed frustration and the issue was not resolved in the call."
  }
}
```

The value powers dashboards/search; the explanation supports QA and coaching.

Filters: controlling relevance and cost

Filters ensure the task runs only when it makes sense. For example:

- do not score CSAT for calls shorter than 15 seconds
- apply a sales insight only to sales queues
- skip internal/test conversations

See: - Filters and Eligibility

Testing and tuning (conceptual)

Before rolling out an insight broadly, administrators typically:

- test it against real conversations
- review both values and explanations
- tune the prompt and filters until outputs match the business definition

The detailed testing workflow (Playground, “save and test”, validation checklists) is described in the **Conversation Analytics – Administration Guide**.

Next: when tasks run (eligibility)

To understand why an insight may appear for some conversations but not others:

- Filters and Eligibility

4.5 Filters and Eligibility

AI insights are not always generated for every conversation. This is usually intentional.

Call Recording supports **filters** and **eligibility rules** to ensure insights are:

- relevant
- accurate
- cost-effective

Why filters exist

Filters help avoid running tasks on conversations where an insight would be unreliable or meaningless, such as:

- extremely short calls (“Hello?” … hang up)
- internal/test conversations
- conversations outside the task’s scope (e.g., sales insight on support calls)

Common filter examples

Depending on your deployment and configuration, filters may include:

- **Direction**: inbound only or outbound only (voice calls)
- **Duration**: only conversations longer than a threshold (e.g., > 15 seconds)
- **Channel**: voice vs chat vs ticket (when enabled)
- **Queue/team**: only apply to specific business units
- **Tags/metadata**: apply based on custom business labels

Eligibility prerequisites (even without filters)

Some tasks require basic conditions:

- transcript/thread text must exist
- enough content must be present to infer the result
- language support (where applicable)

If prerequisites are not met, the task may be skipped or return “unknown / insufficient evidence.”

What to do if an insight is missing

From a user perspective, common reasons include:

- the conversation was too short
- the conversation did not match the task’s filters
- the transcript/thread is missing or incomplete
- the insight is not enabled for your organization

If missing insights are a recurring issue, an administrator should review:

- filters (are they too strict?)
- data quality (are transcripts available?)
- whether the insight is enabled

Next: practical use cases

To see how teams use filtered insights in real workflows:

- Customer Support and CX
- Sales Coaching and Revenue Insights

5. Use Cases

5.1 Customer Support and CX

Conversation Analytics helps CX and support teams understand customer needs at scale and focus coaching and process improvements where they matter most.

Problems this solves

Support organizations often struggle with:

- inconsistent visibility into why customers are contacting you
- slow identification of emerging issues (“we didn’t notice until it became a crisis”)
- manual QA and limited sampling
- difficulty linking coaching to measurable outcomes

How Conversation Analytics helps

Common CX workflows include:

1) Track CX metrics over time

Examples: - CSAT distribution and average - churn risk trends - issue resolution rates (where enabled)

Dashboards make it easy to see: - what’s improving vs getting worse - which teams/queues need attention

2) Drill down into dissatisfied conversations

Example workflow: 1. Open a CSAT dashboard 2. Click the “Dissatisfied” bucket 3. Review conversations and explanations 4. Identify common drivers (topics, process failures, policy issues) 5. Take action (coaching, documentation updates, escalation playbooks)

3) Identify top issues and escalation drivers

Topic and reason/outcome insights can highlight: - top drivers of contact volume - spikes in certain issues - common escalation reasons

What to look for

When using CX insights, teams often focus on:

- **trend changes** (week-over-week shifts)
- **concentration** (a few issues driving many low scores)
- **coaching opportunities** (patterns of missed empathy or resolution steps)
- **systemic issues** (policy/process gaps)

Related concepts

- Custom Fields and Metrics
- Where Insights Appear
- Trust, Quality, and Expectations

5.2 Sales Coaching and Revenue Insights

Conversation Analytics helps sales teams capture pipeline signals from conversations and scale coaching beyond anecdotal call reviews.

Problems this solves

Sales organizations commonly face:

- limited visibility into what prospects actually said (beyond notes)
- inconsistent identification of objections and competitor mentions
- difficulty measuring whether reps follow discovery best practices
- manual call review that doesn't scale

How Conversation Analytics helps

1) Surface common objections and competitor mentions

Insights can capture: - top objections (pricing, integration, security, timing) - competitors mentioned - product gaps or pain points

These can be trended in dashboards and segmented by team/rep.

2) Identify next steps and urgency signals

Conversation Analytics can extract: - next actions - urgency level - timelines and scheduling cues

This helps ensure follow-up actions are consistent and timely.

3) Support coaching with evidence and explanations

Instead of "I think this call was weak," managers can review: - structured insights - explanations that point to evidence - patterns across a rep's conversations

Example workflow

1. View a dashboard for “Competitors Mentioned” or “Top Objections”
2. Drill down into the most common category
3. Review a handful of conversations with explanations
4. Build targeted coaching and enablement content

Related concepts

- AI Tasks and Prompts
- Search and Filters

5.3 Quality Assurance (Auto QA)

Quality assurance programs need consistency and scale. Conversation Analytics can help by turning QA standards into structured, reviewable results.

What Auto QA is (high level)

Auto QA applies a structured scorecard/rubric to conversations, such as:

- required statements and compliance checks
- process adherence
- empathy and communication behaviors
- resolution steps and customer handling

Outputs can be used to: - prioritize manual reviews - track trends and coaching impact - support auditing (where enabled)

> Auto QA configuration details (scorecards, tasks, rollout) are covered in the Conversation Analytics – Administration Guide.

How QA teams use Conversation Analytics

1) Increase coverage

Instead of sampling a small percentage of conversations manually, teams can:

- review outliers and high-risk conversations
- monitor performance across all teams
- focus human effort where it adds the most value

2) Improve consistency

Structured results help reduce reviewer variance and provide consistent standards.

3) Coach using evidence

Explanations (and question-level outputs, where available) help managers coach specific behaviors.

Recommended approach

- start with a limited scorecard (high-confidence questions)
- validate on a representative sample
- roll out gradually and refine over time

Related concepts

- Trust, Quality, and Expectations
- Where Insights Appear

5.4 Compliance and Risk

Many organizations use conversation analytics to reduce risk and support compliance and audit workflows.

> **Note:** Compliance capabilities depend on your deployment, data policies, and enabled features.

Common compliance and risk goals

Teams often want to:

- identify conversations that may require follow-up or escalation
- ensure agents follow required disclosures or scripts (where applicable)
- surface high-risk topics (e.g., cancellations, disputes, threats, regulated language)
- support audits with consistent evidence and reporting

How Conversation Analytics helps

1) Structured identification of risk signals

AI insights can classify conversations into risk-related categories and make them searchable and reportable.

2) Faster investigation and triage

Dashboards and search filters help compliance teams quickly find:

- conversations matching specific criteria
- outliers and spikes in a category

3) Evidence-based review

Explanations can provide context for why a conversation was categorized a certain way, which helps reviewers assess validity quickly.

Recommended practices

- align insight definitions with your policies and legal guidance
- validate outputs with a representative sample before relying on them operationally
- ensure appropriate access controls and retention policies in your environment

Related concepts

- Filters and Eligibility
- Trust, Quality, and Expectations

6. Quick Start (Example)

6.1 Start Small: First 7 Days

This section offers a **conceptual rollout plan** designed for new customers and evaluators. It avoids UI details so it can be used as a quick "what success looks like" guide.

For more detailed setup instructions, see the **CR Conversation Analytics Administration Guide**

Day 1–2: Confirm data readiness

- Ensure your environment is receiving conversation records (calls, and/or enabled text channels).
- For voice calls, confirm **transcription is enabled** and transcripts look reasonable.
- Identify 2–3 teams/queues to pilot first.

Success criteria - You can open a conversation and see a transcript/thread and core metadata.

Day 2–3: Enable a small set of insights

Start with a "starter pack" that provides fast value:

- Conversation summarization
- Sentiment
- One metric (CSAT is a common starting point)

Success criteria - Insights begin to appear for pilot conversations (not necessarily all conversations—filters may apply).

Day 3–4: Validate and calibrate

- Review a sample of conversations across pilot teams.
- Check both **values** and **explanations**.

- Note edge cases and clarify definitions (what “resolved” means, what “dissatisfied” looks like in your org).

Success criteria - Stakeholders agree outputs are directionally correct and explanations are helpful.

Day 4–6: Roll out dashboards and saved searches

- Create dashboards for the pilot insights (e.g., CSAT distribution and trend).
- Create saved searches for operational use:
- “CSAT < 3”
- “Negative sentiment”
- “Escalation reason = …” (if enabled)

Success criteria - Supervisors can drill down from a dashboard bucket to the underlying conversations.

Day 6–7: Expand and operationalize

- Expand to additional teams/queues.
- Add 1–2 additional insights based on what the pilot revealed.
- Define a weekly review cadence:
- top drivers of dissatisfaction
- trending topics
- coaching themes

Success criteria - Conversation Analytics becomes part of weekly operational routines.

Next: rollout checklist

- Rollout Checklist

6.2 Rollout Checklist

Use this checklist to plan a smooth rollout of Conversation Analytics.

This checklist is written for evaluators, admins, and stakeholders. Detailed configuration steps live in the **Conversation Analytics – Administration Guide** and **Platform Setup & Operations Guide**.

Data readiness

- Conversations are flowing into Call Recording (voice calls and/or enabled text
- channels) For voice: transcripts are present and readable
- Metadata is available (team/queue, agent, timestamps)
- Test conversations and internal calls are identified (so they don't skew metrics)

Insight rollout

- Decide initial use cases (CX, QA, Sales)
- Select 2–3 starter insights (e.g., summarization, sentiment, CSAT)
- Define business definitions:
- CSAT scale interpretation (1–5)
- what counts as "resolved"
- approved dropdown categories for classifications

Validation and trust

- Sample and review results across teams/queues
- Verify explanations are helpful and grounded in the conversation
- Identify "unknown/insufficient evidence" handling expectations
- Adjust filters to exclude non-actionable conversations (too short, internal tests)

See: - Trust, Quality, and Expectations