CALL RECORDING

Conversation Analytics 101

Intro to AI Tools

User Guide

MOMENTUM

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Table of Contents

1. Overview

Call Recording **Conversation Analytics** helps you understand what happened in customer conversations and why it happened - so you can coach teams, improve customer experience, and spot risks or revenue opportunities faster.

Depending on your deployment and enabled channels, a “conversation” may include:

- voice calls (with transcripts),
- chats,
- emails,
- tickets/threads.

Conversation Analytics turns these conversations into **searchable and reportable insights**, such as:

- summaries and key moments,
- sentiment and topics,
- call/conversation reason and outcome,
- customer experience metrics (for example CSAT, NPS, NES),
- sales insights (for example objections and next actions),
- quality evaluations (Auto QA),
- operational metrics (for example, churn risk, compliance).

Most insights include both: - a **structured value** (score, category, date, etc.), and - a short **explanation** that helps humans understand *why* the AI produced that value.

> **New to the concepts?**
>
> Start with **CR Conversation Analytics (AI) 101**for explanations of transcripts/threads, Custom Fields, AI Tasks, Auto QA, reports, dashboards, and more.

1.1 Who this guide is for

This guide is for day-to-day users, including:

- supervisors and team leads
- Call QA reviewers

1.2 What you will learn

You will learn how to:

- open a conversation and read the transcript/thread,
- understand insight values and explanations,
- use dashboards and drilldowns to find patterns,
- search and filter conversations by insight values (for example “CSAT < 3”),
- follow common workflows (low CSAT review, top issues, sales coaching, Auto QA).

1.3 What this guide does not cover

This guide does **not** cover the system configuration, such as:

- enabling transcription,
- activating insights, like summaries, topics, sentiment,
- enabling/configuring AI Tasks or prompts,
- creating Custom Fields,
- setting filters for AI Tasks,
- tuning and testing AI Tasks,
- creating dashboards or reports.

For Administration/configuration topics, see **CR: Conversation Analytics (AI) Admin Guide**.

2. Getting Started

If you're new to Conversation Analytics, this page shows a quick "first session" path to get value right away.

2.1 10-minute quick start

1. Start with a dashboard

1. Open the **Dashboards** area.
2. Choose a dashboard your organization uses regularly (for example: CSAT, Top Issues, Auto QA).
3. Set a time range (for example: last 7 days).

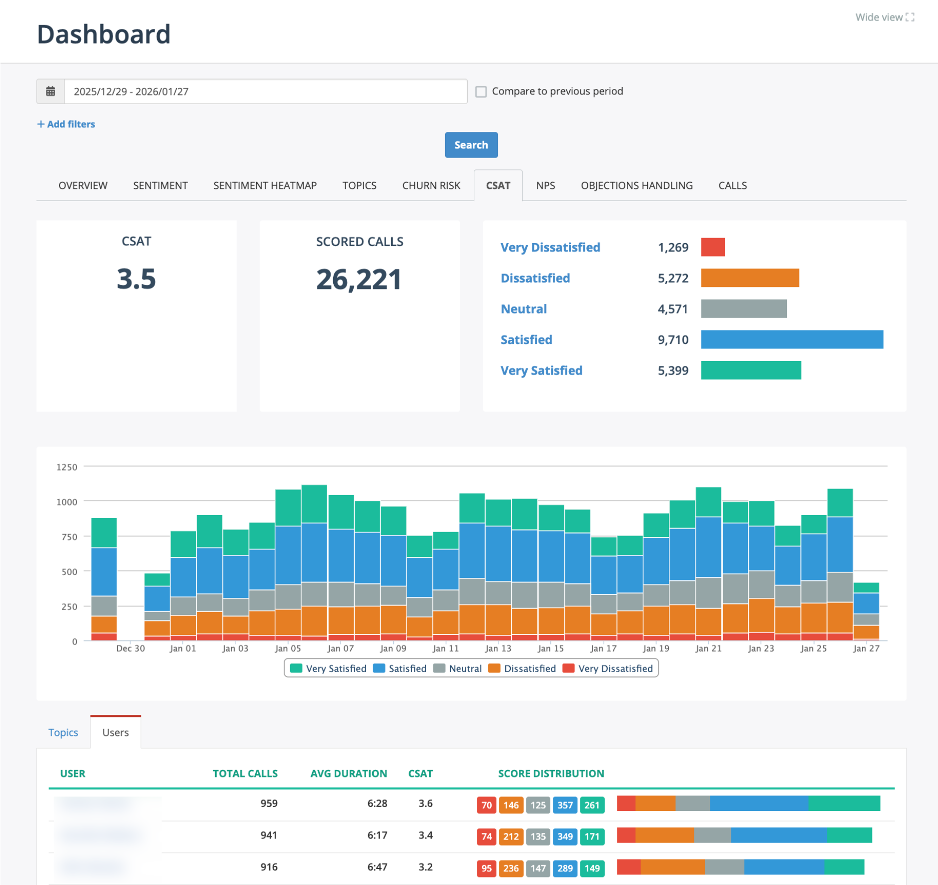


Figure: CSAT Dashboard showing search bar, score distribution, trend over time, and per-user breakdown. Click any bucket to view matching conversations.

What to look for

- Trends over time (up/down changes).
- Distribution “buckets” (for example: satisfied vs dissatisfied).
- Spikes in negative sentiment, escalations, or specific topics.

2. Drill down to the underlying conversations

Many dashboards support drilldowns.

1. Click a bucket (for example: **Dissatisfied**).
2. You should land on a filtered list of conversations that match that bucket.
3. The list shows key insights as columns (for example, Call Reason, Outcome, CSAT score).

> Note: The displayed columns depend on your configuration. Contact your admin if you don't see the expected columns.

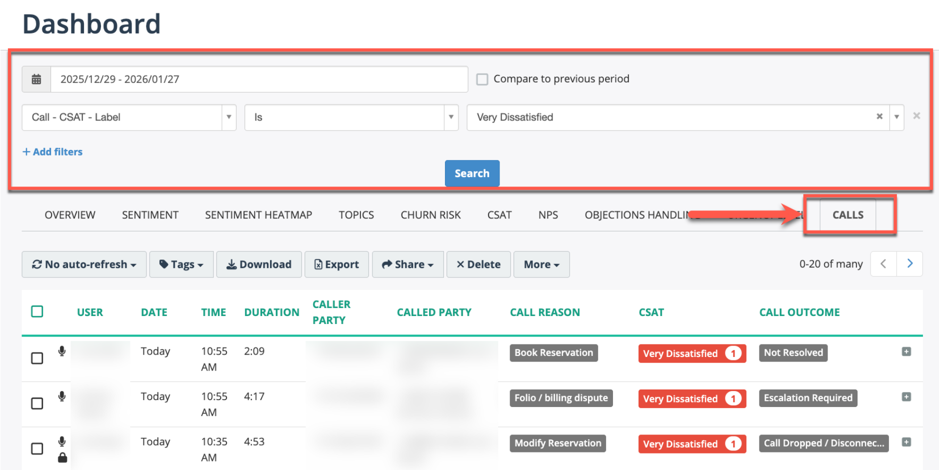


Figure: Dashboard "Calls" tab shown after drilldown from the CSAT Dashboard. It displays a filtered list of conversations matching the selected bucket.

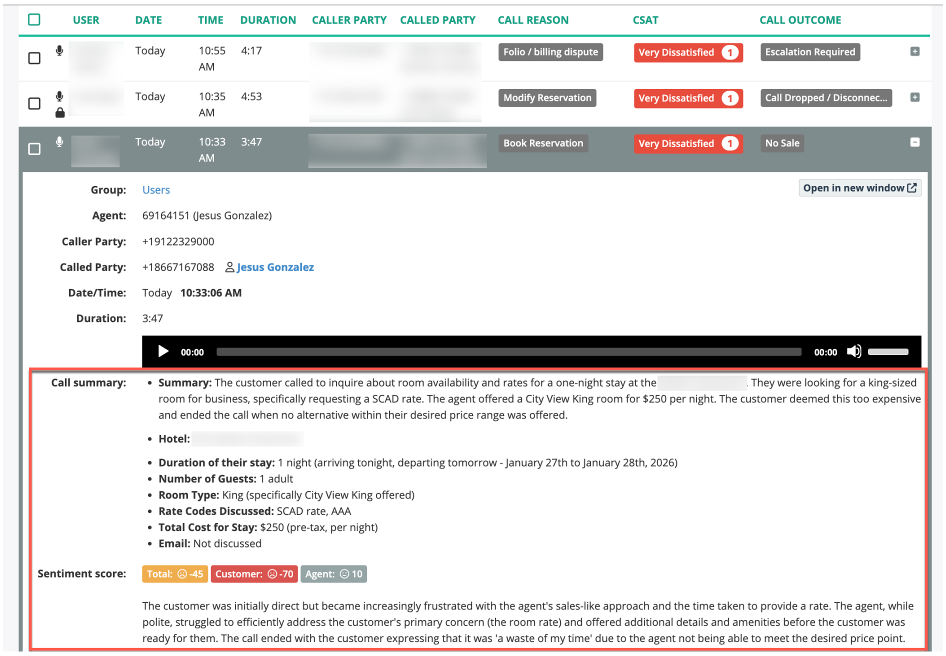
3. Refine with Search

Use Search to narrow down patterns. Examples: - “CSAT < 3 AND Topic = Billing” - “Competitor Mentioned AND Deal Stage = Negotiation” - “Auto QA score < 80 AND Escalation Reason present”

4. Open a conversation and review the insights

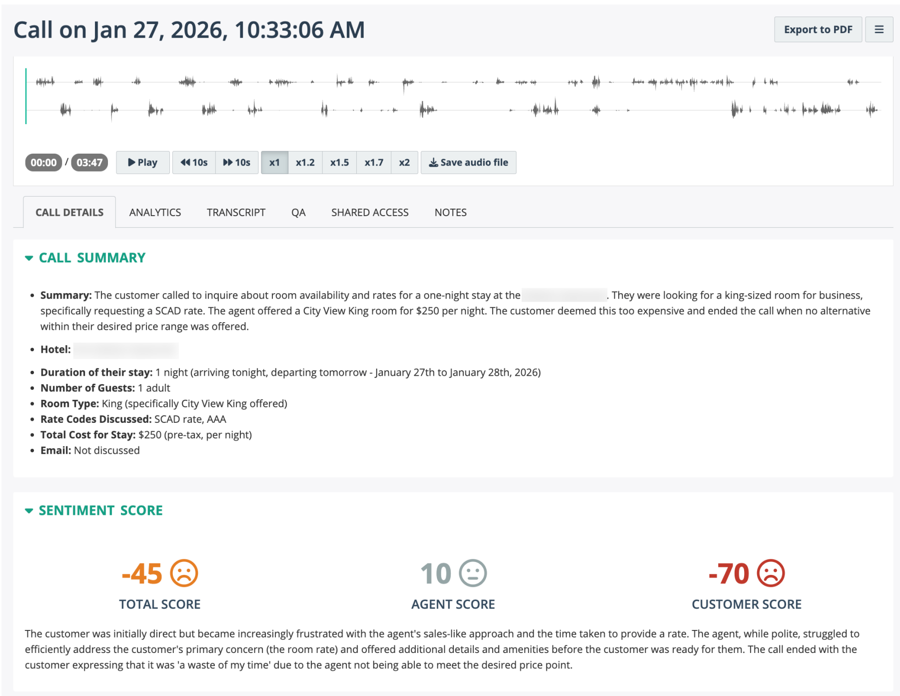
1. Open one conversation from the list by clicking the row

2. Review the summary, sentiment and key insights inline.
3. For more call details, click "Open in new window" or "More details" to see the full transcript/ thread view.

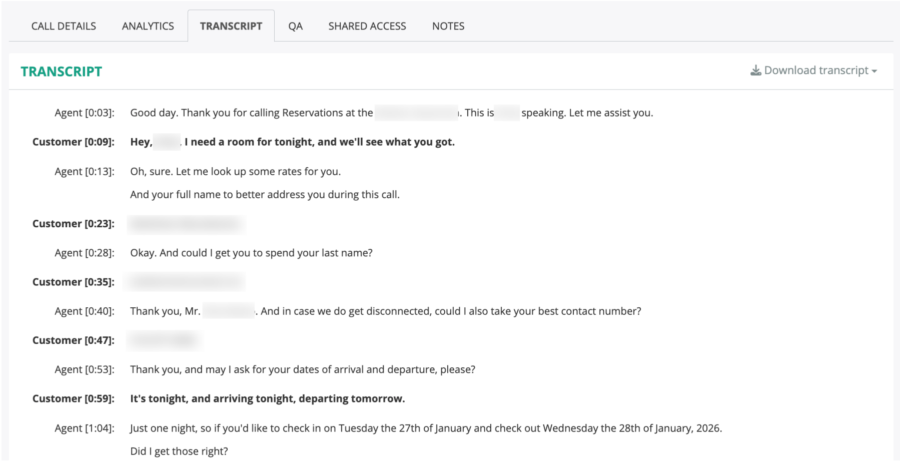


5. Open the full call details (if needed)

1. Click **Open in new window** or **More details** to see the full details and insights.



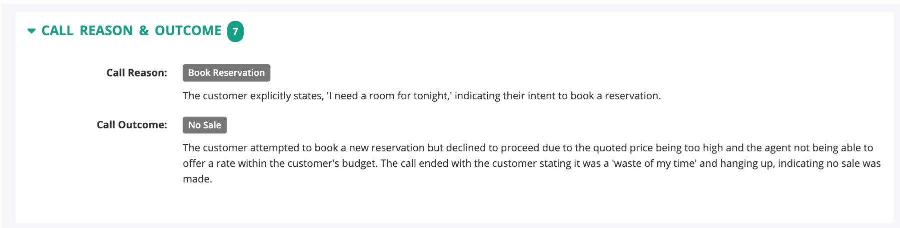
2. Click **Transcript** tab to see the full transcript.



3. Click **Analytics** tab to see the AI insights.

   Depending on your configuration, you may see:

   - CX metrics (CSAT, NPS, NES),
   - Call Reason and Outcome,
   - Sales insights (dollar amount, loss reason, objections and coaching tips),
   - Topics,
   - Custom metrics, like hotel room reservation detrails.



6. Build reports

1. Open the **Reports** area.
2. Create a new report or open an existing one.
3. Set filters and groupings to analyze the data.
4. Export the report as needed (PDF, Excel, etc.).
5. Schedule regular report delivery to your email, if necessary.

Calls by Reason vs Call Outcome

Report Period: Dec 27, 2025 - Jan 26, 2026
Report Timezone: America/Los_Angeles
Run by: gb@miarec.com (Jan 25, 2026, 4:25 PM)
Filters applied
More details

Calls - Total Calls	27,852
Calls - Total Minutes	206,727
# of rows	28

0-28 of 28

Reason for the call	Total Calls	Total Calls / Call - Call Outcome											
		No Sale	Resolved	Not Resolved	Reservation Booked	Follow-up Required	Reservation Modified	Reservation Cancelled	Reservation Confirmed	Escalation Required	Transferred	Other	
Book Reservation	10,379	5,853	271	475	3,167	310	3	3	3	53	37	204	View calls
Modify Reservation	4,834	230	1,178	1,124	189	607	1,190	26	10	170	75	35	View calls
Cancel Reservation	2,411	7	191	542	0	309	6	1,165	2	157	16	16	View calls
Confirm Reservation	2,293	22	867	340	1	111	13	6	855	18	39	21	View calls
General Hotel Information	1,292	206	872	132	0	30	0	0	0	5	30	17	View calls
Third-party Reservation	1,232	21	357	642	0	44	1	0	131	6	26	4	View calls
Folio / billing dispute	1,081	2	236	185	0	487	2	0	0	127	35	7	View calls
Email Confirmation Not Received	783	1	528	39	0	62	5	1	131	6	6	4	View calls
Early Check In	498	9	371	52	0	21	3	0	1	4	31	6	View calls
Complaint or Escalation	447	7	33	131	0	99	0	2	0	121	38	16	View calls
Group / meeting space inquiry	371	19	51	45	0	227	0	0	0	12	17	0	View calls
Late Arrival	365	0	280	21	1	9	27	0	13	1	10	3	View calls
Requested front desk	348	1	49	128	0	21	0	0	0	2	130	17	View calls
Concierge / Guest Service	300	1	83	29	0	156	0	0	0	2	25	4	View calls

Figure: Example report showing Call Reason breakdown by Outcome.

2.2 Recommended habits (small things that help a lot)

- **Read the explanation before you judge the score.** It often points to specific moments in the transcript/thread.
- **Use drilldowns instead of random sampling.** You'll find patterns faster.
- **Look for consistency.** One bad call is an outlier; a bucket trend is a process problem.

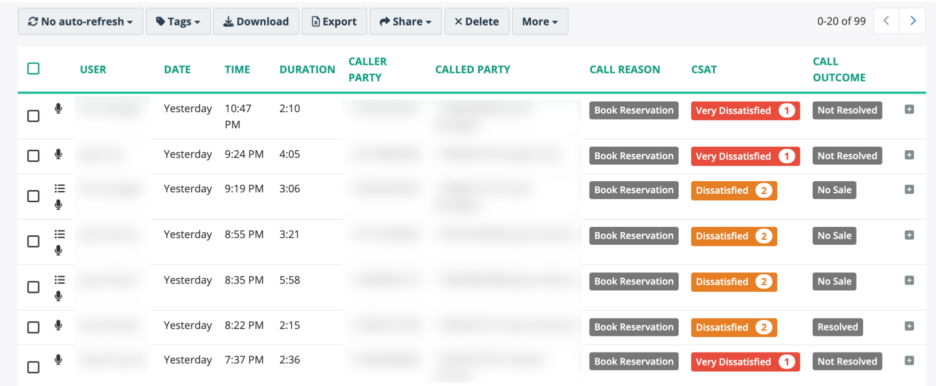
3. Using Conversation Analytics

3.1 Find and Open Conversations

This chapter explains how to find the right conversations to review - by time period, agent/team, and AI insights.

Start from the conversation list

Most day-to-day work begins in the conversation list.



Common things you can do from the list:

- change the time range,
- filter by agent/team, call atrributes and key metrics (for example Call Reason, CSAT),
- open a conversation to review details.

Filters you will use most often

Time range

Use time ranges to avoid misleading conclusions.

- For coaching: last 7–14 days
- For trend review: last 30–90 days
- For incident review: a specific date range

Ownership and routing

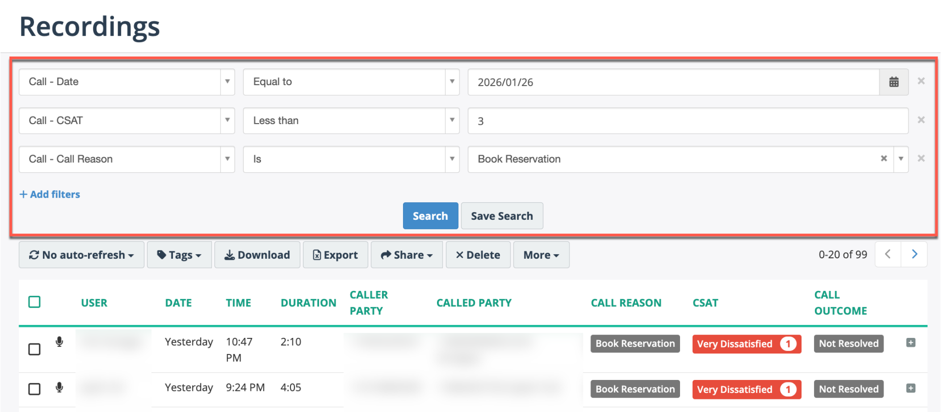
Depending on your deployment, you may be able to filter by:

- agent (references in UI as "user")
- team (references in UI as "group")
- call direction
- Call Reason

AI insight filters (if enabled)

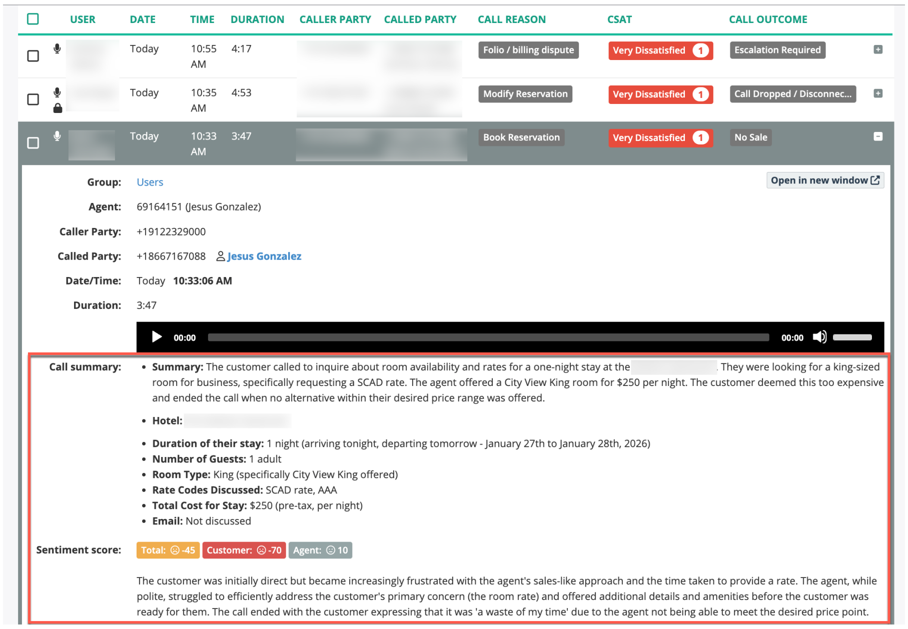
AI insights usually appear as filters (often under “Custom Fields”, “Metrics”, or “Insights”). Examples:

- CSAT < 3
- Sentiment = Negative
- Call Reason = Cancellation
- Call Outcome = Escallation
- Competitor Mentioned = Yes

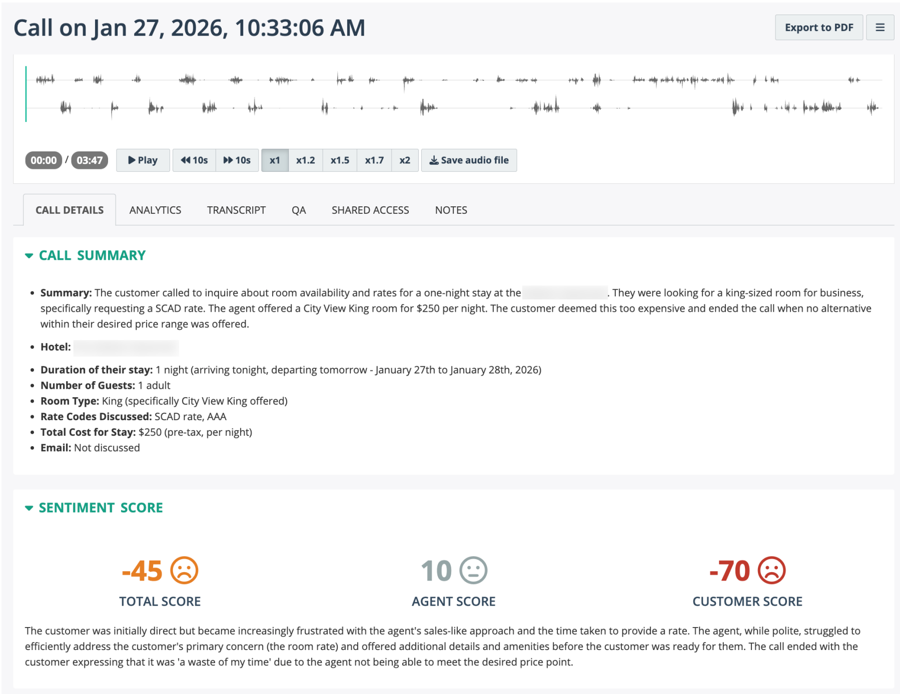


Open a conversation

1. From the list, click a conversation row.
2. Review key metadata (participants, time, agent) inline.



3. Navigate to the call details by clicking "Open in new window" or "More details" buttons.



3.2 Conversation Details

The Conversation Details page is where you review a single conversation end-to-end:

- metadata (time, participants, agent/team),
- transcript,
- conversation summary,
- AI insights.

What you'll typically see

In the conversation details page, you can see:

- Audio player
- Call metadata (date/time, participants, duration, etc.)
- Call Summary
- Sentiment score
- Full transcript
- AI insights (for example, Call Reason, Outcome, CSAT)
- QA scores (if Auto QA is enabled)
- Notes and comments

A recommended review approach

For effective review of the conversation, check these key areas first:

- **Call Summary**. Most of the time, the summary gives sufficient information about the call, without needing to listen to it or read the full transcript.
- **Sentiment score**. Read the explanation to understand *why* the AI assigned that score.
- **Call Reason and Outcome**. They provide information of the reason for the call and how it ended.
- Other AI Insights relevant to your workflow (for example, CSAT, NPS, Sales Lost Reason, Objections).

If you need more context, skim the transcript and/or listen to the audio recording.

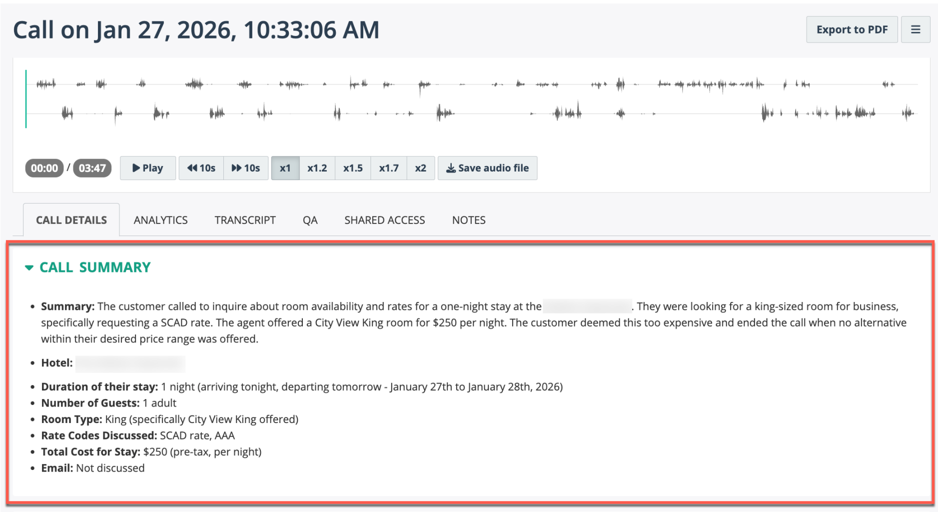
> **Pro tip**
>
> Use the Call Summary and Sentiment explanation to quickly understand the call context and emotional tone before diving into details.
>
> Listen to the audio as a last resort, when you need to validate specific points or gather additional context not captured in the transcript.

Call Summary

The AI-generated Call Summary provides a concise overview of the conversation, highlighting key points and topics discussed.

With one glance, you can understand the main themes of the call without going through the entire transcript.

It is shown on the "Call Details" tab.

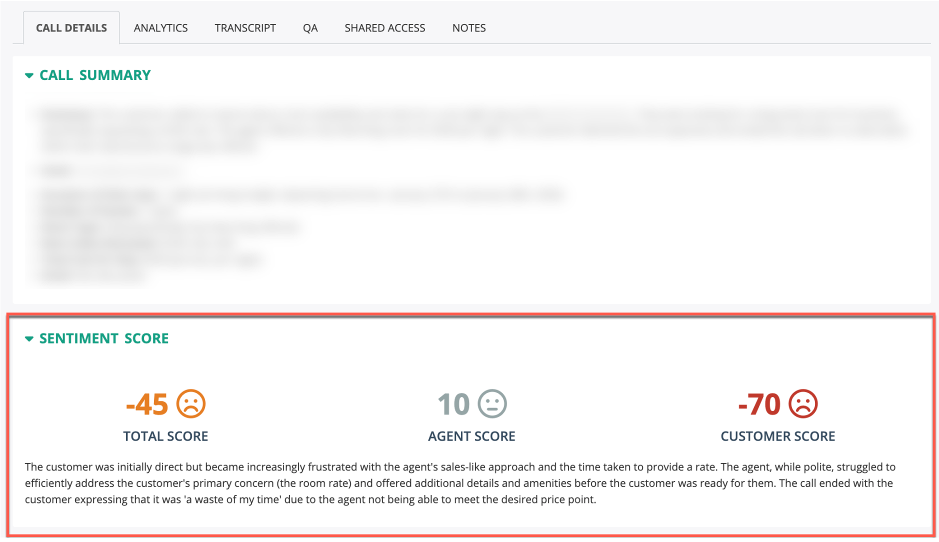


> Note: The format and content of the Call Summary may vary based on your organization's configuration.

Sentiment info

The sentiment score section indicates the overall emotional tone of the conversation, ranging from negative to positive.

Besides a numerical score (from -100 to +100), it includes a detailed explanation that influenced the score.



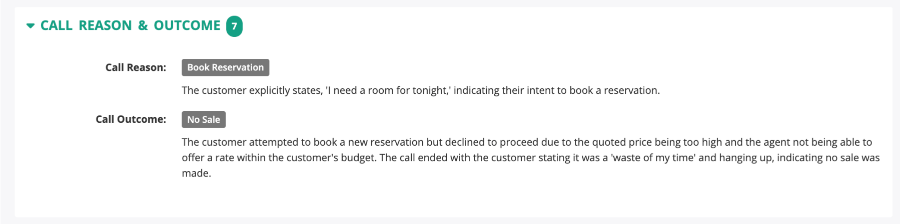
AI insights

Open **Analytics** tab to see all the AI-generated insights for the conversation.

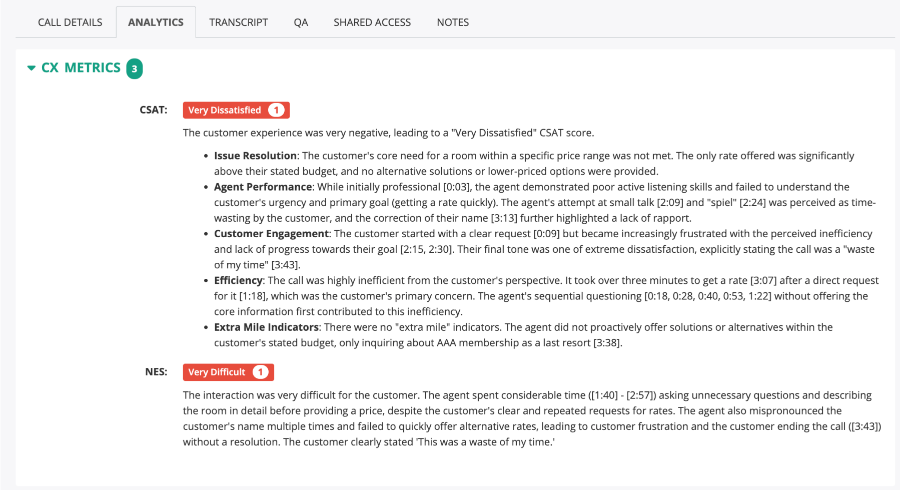
> **Note**: The list of available AI insights depends on your organization's configuration and call type.

Key insights to review include:

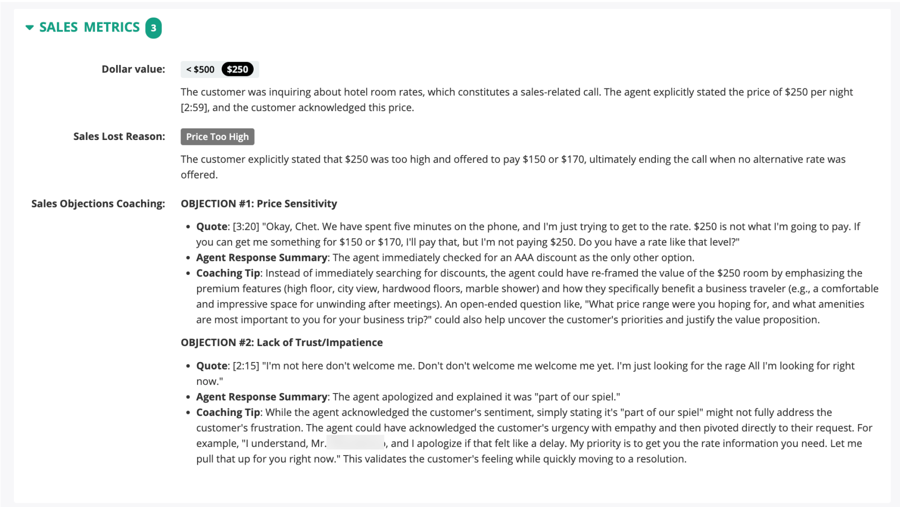
- **Call Reason and Outcome**: Understand why the customer contacted support, and how the interaction concluded.



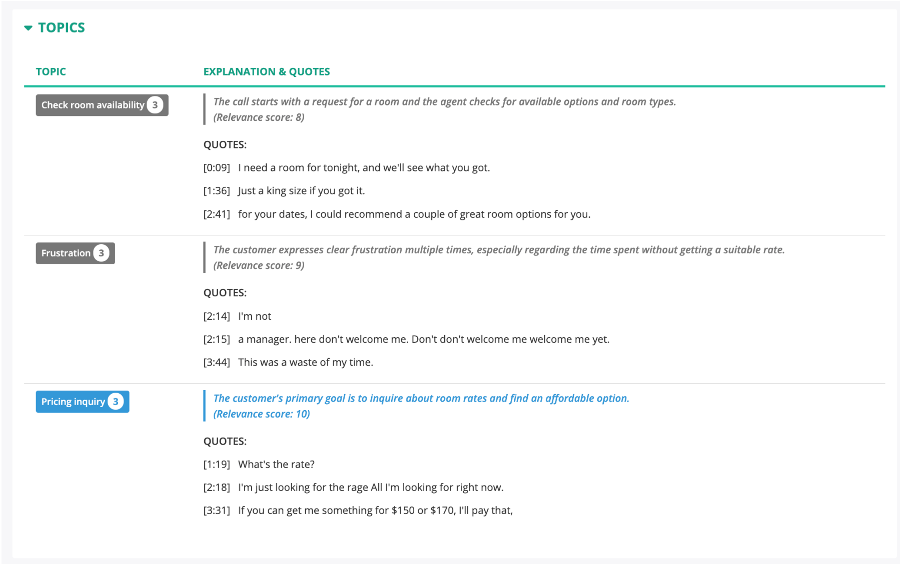
- **CX metrics**: Key customer experience indicators, such as CSAT, NPS or NES.



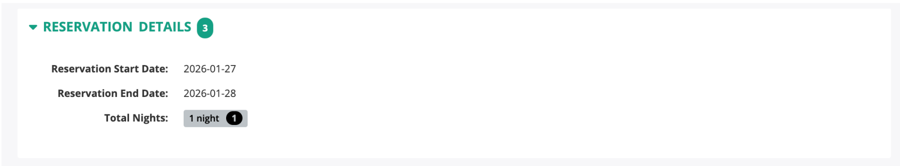
- **Sales metrics**: Sales-related insights, such as Lead Score, Dollar Amount, Sales Lost Reason, Objections handling.



- **Topics**: Main subjects discussed during the call.



- Custom metrics: Any organization-specific insights, such as Reservation Details.

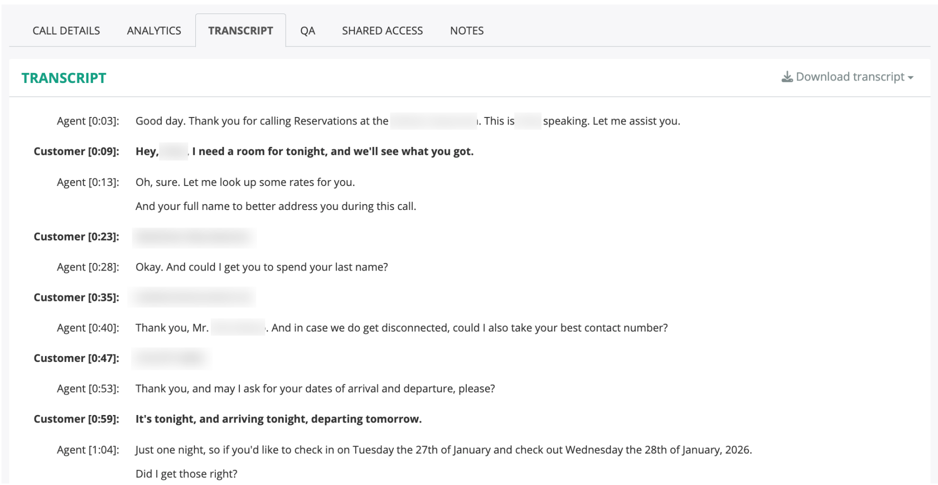


Transcript

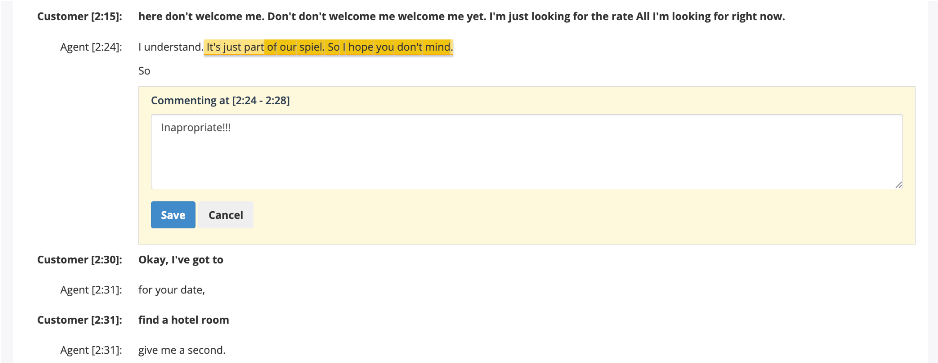
Open **Transcript** tab to see the full transcript.

From this tab, you can:

- Click in the transcript to fast-forward the audio player to that moment in the conversation,
- Download a transcript as a text, if you have permissions

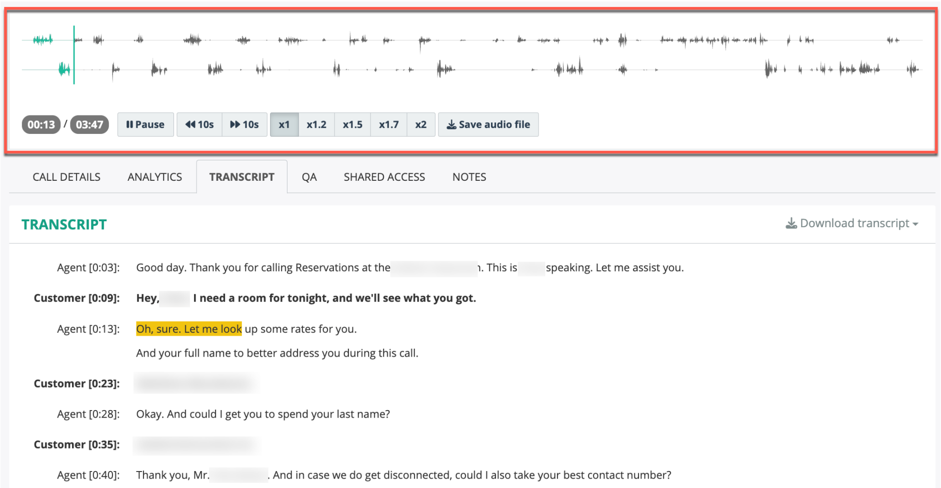


Select the text in the transcript to add the inline comments or annotations, if necessary:



Audio player

The audio player is shown at the top of the Call Details page.

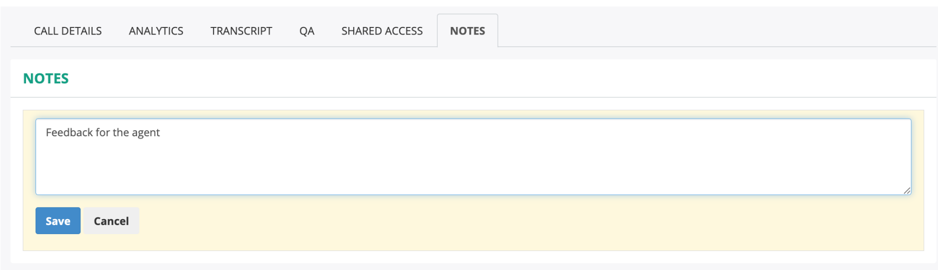


Tips when listening to the audio:

- Open the Transcript tab when listening to the audio. The transcript highlights the spoken words in real-time.
- When scanning the transcript, click any part to jump the audio player to that moment in the call.
- You can increase speed of audio playback (for example, 1.25x or 1.5x) to save time.
- You can download the audio file, if you have permissions.

Notes and comments

Open **Notes** tab to see the existing notes or add your own notes.

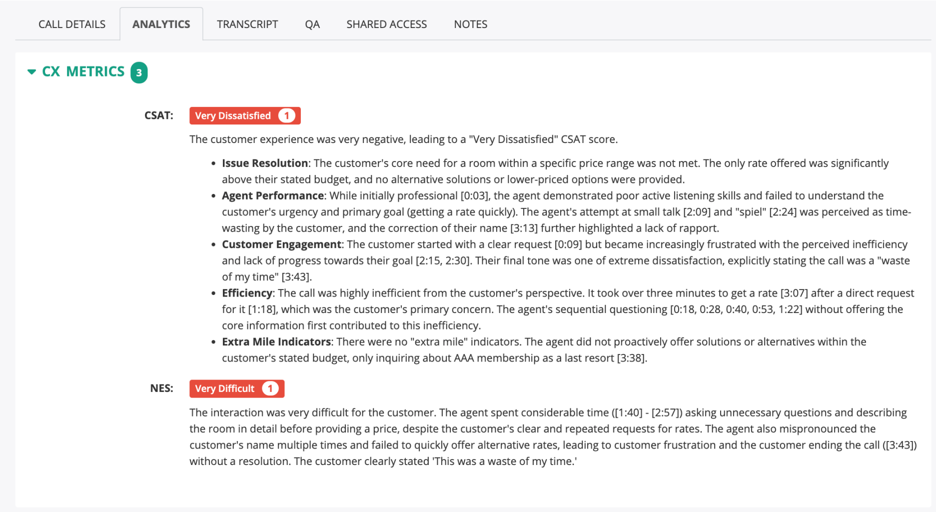


3.3 Understand Insights and Explanations

AI insights in Call Recording typically include two parts:

1) a **value** (score/category/date/text), and
2) an **explanation** (short rationale referencing what happened in the conversation).

The value powers dashboards and search. The explanation helps humans quickly validate and act on the result.



Common insight types

Scores (numeric)

Examples:

- CSAT 1–5
- NPS (detractor/passive/promoter or 0–10, depending on your configuration)
- QA score (0–100)

How to interpret:

- Scores are useful for trends and filtering.
- They're not "facts"—they are **inferred** from the conversation content.

Categories (single-select)

Examples:

- Sentiment: Positive / Neutral / Negative
- Outcome: Resolved / Unresolved
- Lead Stage: Discovery / Negotiation / Closed

How to interpret:

- Category labels come from your organization’s definitions.
- If the category doesn’t match your expectation, check whether the transcript has enough evidence.

Multiple labels (multi-select)

Examples:

- Topics: Billing, Cancellation, Product issue
- Sales objections: Price, Competitor, Timing

How to interpret:

- Multi-label insights can reflect multiple segments of the conversation.
- Explanations should clarify why each label was selected (depending on configuration).

Extracted entities (text/date/amount)

Examples:

- Reservation start date
- Deal dollar amount
- Competitor name
- Next action text

How to interpret:

- Entity extraction depends heavily on transcript/thread quality.
- Confirm with the transcript if precision matters.

How to read explanations

When you review an insight:

1. Read the explanation.
2. Find the referenced moment in the transcript/thread.
3. Decide whether the value is "good enough" for the intended use (coaching, QA, reporting).

> Tip: Explanations are designed to reduce "black box" frustration. Use them first—before escalating a "wrong score" issue.

Handling ambiguity

Sometimes the conversation doesn't contain enough evidence to confidently assign a value:

- the call is too short,
- the call is being transferred to another department and the outcome is unknown.

In these cases, your organization may:

- assign a neutral score/category,
- use an "Unknown / Not enough evidence" bucket (if configured),
- rely more on explanation than on the value.

What to do if you disagree with an insight

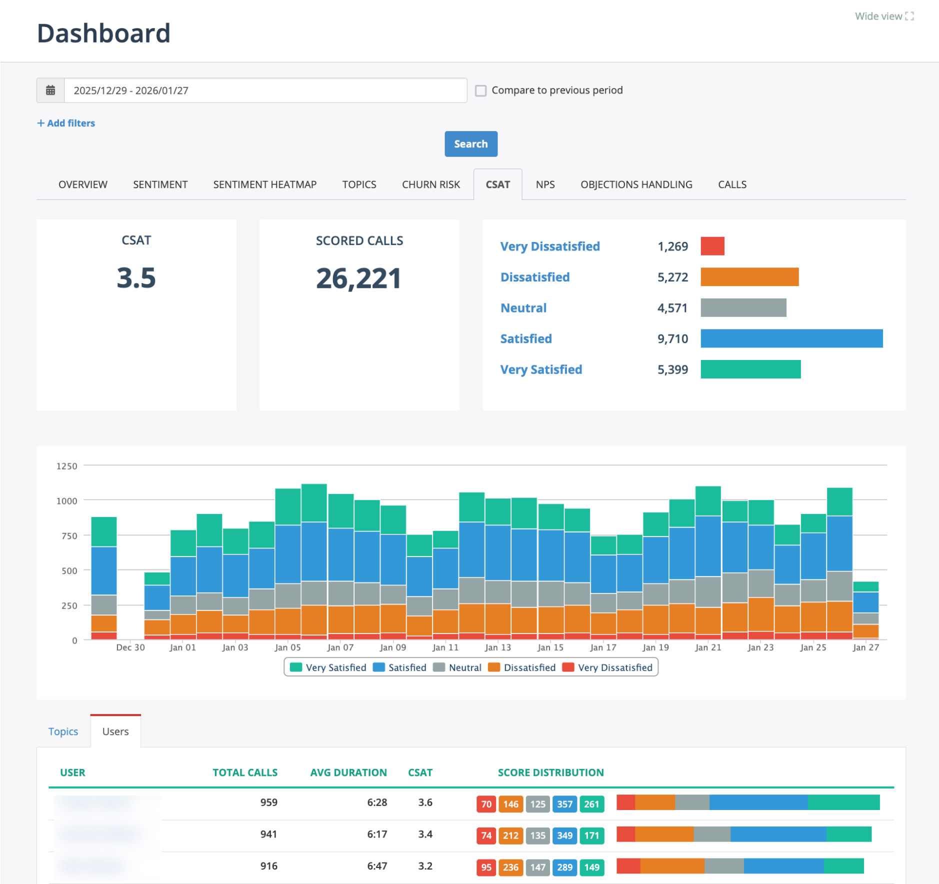
- If the explanation is clearly inconsistent with the transcript, capture:
- the conversation link/ID,
- the insight value,
- the part of the transcript that contradicts it.
- Share it with your admin team. They may tune:
- prompt definitions,
- filters (exclude short calls),
- or thresholds/buckets.

4. Dashboards

4.1 Dashboards

Dashboards help you spot patterns across many conversations—fast:

- trending changes over time,
- distributions (buckets),
- comparisons across agents/teams.



Dashboards vs Reports

Dashboards in Call Recording are pre-configured visual summaries of key metrics and insights, designed for quick overviews and trend analysis.

For detailed, customizable data analysis and export, user the **Reporting** functionality.

Common dashboard parts

Time range

Allows you to set the time window for the data shown in the dashboard.

KPI metrics and distibution buckets

Examples:

- average score,
- disbution of scores into buckets (for example: Satisfied, Neutral, Dissatisfied).

Buckets are often clickable:

- click a bucket → jump to the list of conversations in that bucket.

Trends over time

Trends show whether a metric is improving or worsening.

Breakdown by Topic and Agent (user)

Breakdowns help you compare performance across different dimensions, such as:

- Conversation Topics,
- Agents (users).

4.2 Search and Filters

Search lets you move from “I think something is happening” to “Here are the exact conversations”.

Search is available in the following modules:

- Conversation list,
- Dashboards,
- Reports.

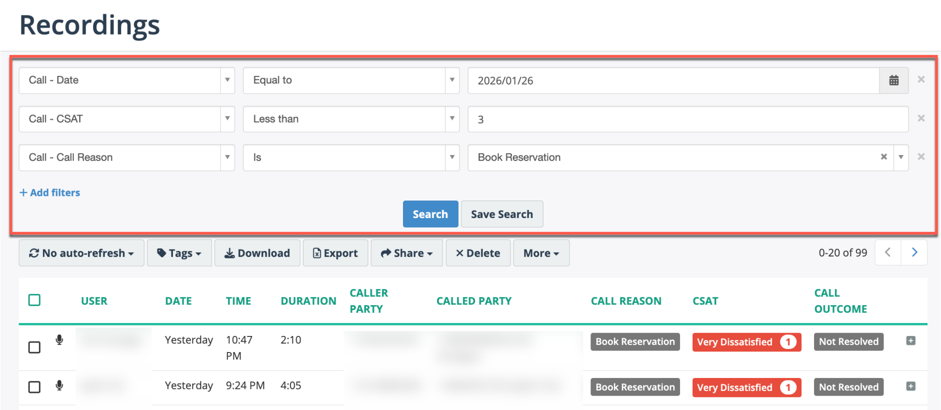


Figure: Conversation list with search filters applied.

Common search patterns

Find dissatisfied conversations (CSAT < 3)

Example query:

- CSAT **less than** 3

Then optionally add:

- Call Reason = [specific reason],
- Call Direction = Inbound,
- Agent = [specific agent].

Find conversations about a specific issue

Example query:

- Topic contains “Cancellation”
- Sentiment = Negative

Find sales risk conversations

Example query:

- Competitor mentioned = Yes
- Lead stage = Negotiation
- Sales lost reason is present

Find QA failures (Auto QA)

Example query:

- QA score < 80
- Question “Verification” = Failed

5. Workflow Examples

5.1 Investigate Low CSAT and Detractors

This workflow helps you move from “CSAT dropped” to “here’s what caused it and what to fix.”

Goal

Identify the drivers of dissatisfied conversations and take action (coaching, process improvements, escalation handling).

Step-by-step workflow

1) Start with the CSAT dashboard

- Set a time range (for example last 7 or 30 days).
- Look for:
- an increase in “Dissatisfied” buckets,
- a downward trend in average CSAT.

2) Drill down to dissatisfied conversations

- Click the bucket (for example **CSAT ≤ 2**).
- You should land on a list of matching conversations.

3) Review a sample (5–10 conversations)

For each conversation:

1. Open the conversation details.
2. Review the CSAT value and **explanation**.
3. Confirm the evidence in the transcript/thread.

4) Categorize root causes

Create a simple tally while sampling:

- long hold/transfer loops,
- unresolved issue,
- policy limitation,
- agent empathy/communication issue,
- product defect/outage,
- billing/price confusion,
- other recurring topics.

5) Take action

Examples:

- coaching: share 2–3 examples with the agent/team lead
- process: update scripts or knowledge base
- escalation: flag a product/policy issue for leadership
- monitoring: create a saved view for “CSAT ≤ 2” and review weekly

Tips for higher-quality CSAT reviews

- Don’t overreact to a single call—look for patterns.
- If calls are very short, CSAT may be less reliable. Use explanations to confirm.

Example: CSAT Dashboard drilldown

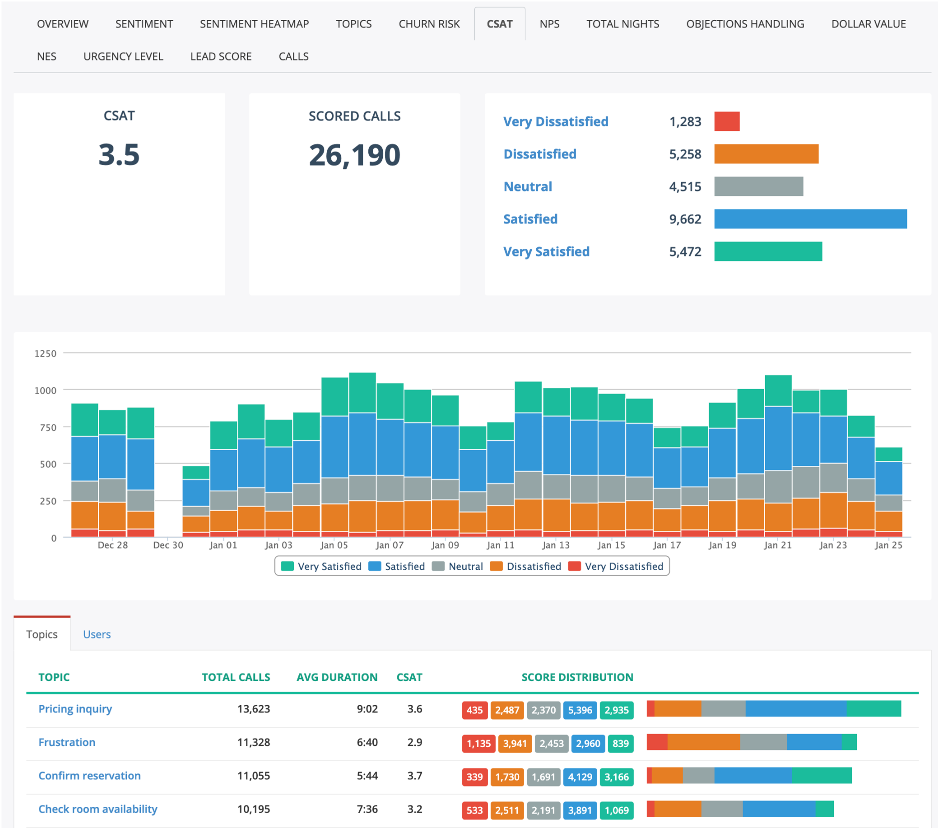


Figure: Start from the CSAT Dashboard and click a bucket (e.g., "Dissatisfied") to drill down to matching conversations.

> **Tip:** Use the Notes feature on individual conversations to track your findings and coaching actions.

5.2 Identify Top Issues and Escalations

This workflow helps you identify the most common customer issues and understand why escalations occur.

Goal

Answer questions like:

- What are customers contacting us about most often?
- Which issues drive escalations or dissatisfaction?
- Where should we focus coaching or process changes?

Step-by-step workflow

1) Start with Topics or "Top Issues" dashboards (if available)

- Choose a relevant time range (30–90 days is often useful).
- Identify:
- top recurring topics/issues,
- topics trending upward,
- topics correlated with low CSAT or negative sentiment.

2) Drill down into a specific issue

- Click the topic/issue bucket to see the underlying conversations.
- Sample 5–10 conversations.

3) Review explanations to understand drivers

For each conversation, look for:

- what triggered the issue,
- whether the issue was resolved,
- whether the customer's expectation matched the outcome.

4) Add escalation analysis (if enabled)

If your org tracks escalation reasons:

- filter to conversations with “Escalation Reason is present”
- group by escalation reason
- drill down and identify patterns (policy limits, long wait, missing info, etc.)

5) Take action

Common actions:

- update knowledge base and scripts
- coach on handling common objections or policy explanations
- fix product/process issues driving repeated contacts
- adjust routing/triage rules (if applicable)

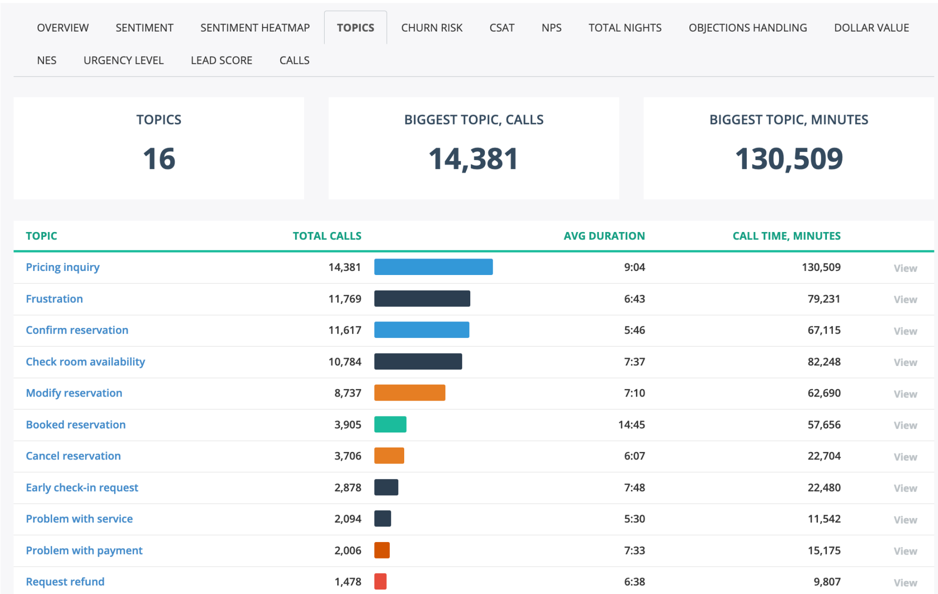


Figure: Topics dashboard showing distribution of conversation topics.

5.3 Sales Coaching (Objections, Competitors, Next Actions)

Conversation Analytics can help sales teams review calls faster and coach with evidence:

- what objections were raised,
- which competitors were mentioned,
- what next actions were agreed,
- whether urgency was present,
- why deals were lost (when captured).

Goal

Improve win rates and consistency by focusing coaching on real customer signals.

Step-by-step workflow

1) Start with a sales-focused dashboard or saved view

Common starting points:

- “Competitors mentioned this week”
- “Top objections (last 30 days)”
- “High-value deals with negative signals”

2) Filter to a segment you care about

Examples:

- lead stage = negotiation
- deal amount > threshold
- lead score < target
- competitor mentioned = yes

3) Review a sample of conversations

For each conversation:

1. Read the summary (if available).
2. Review objection/competitor/next-action insights.
3. Read explanations and validate key moments in the transcript.

4) Coach on patterns, not one-offs

Look for repeated patterns such as:

- weak discovery questions,
- missed urgency signals,
- poor competitor handling,
- unclear next steps.

5) Turn findings into playbooks

- Update objection handling scripts.
- Create example clips/transcript excerpts (if your org supports sharing).
- Define “good next actions” and reinforce in training.

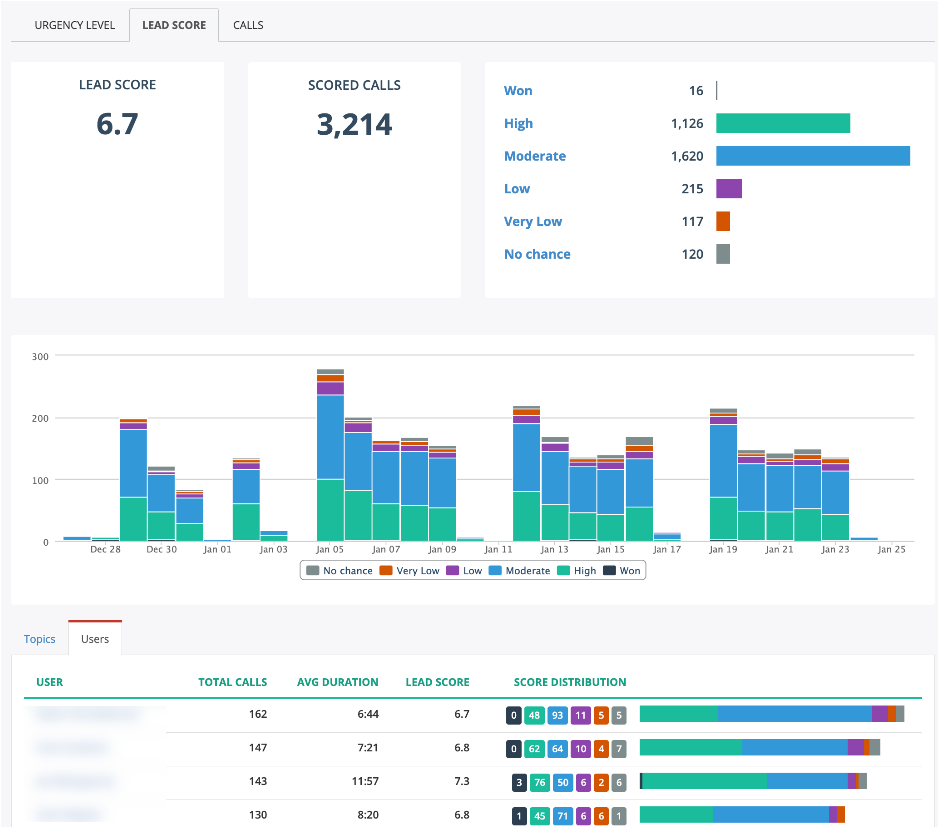


Figure: Lead Score dashboard showing score distribution and trend.

5.4 Quality Reviews with Auto QA

Auto QA helps QA teams review more conversations by scoring them against a **QA scorecard** (sections and questions).

Goal

Use Auto QA to:

- find low-scoring conversations quickly,
- understand which questions are failing most often,
- coach teams using consistent criteria.

Step-by-step workflow

1) Start with the QA dashboard (if available)

- Set a time range (last 7–30 days).
- Identify:
- average QA score trend,
- distribution of scores,
- any spikes in failures.

2) Drill down to low-scoring conversations

- Click the low-score bucket (for example “QA < 80”).
- Review a sample set of conversations.

3) Review question-level details

In each conversation:

- review the overall QA score,
- review section/question outcomes (pass/fail/score),
- read explanations for why a question was scored that way (if shown),
- validate against transcript/thread.

4) Identify systemic issues

Look for recurring failures such as:

- missing verification steps,
- missing disclosures,
- improper closing,
- policy or compliance misses.

5) Coach and track improvements

- share examples with team leads,
- update coaching materials,
- watch trend changes over time.

Auto QA results view

Auto QA results are displayed on the **QA** tab in conversation details, showing:

- Overall QA score
- Section-by-section breakdown
- Question-level pass/fail results with explanations

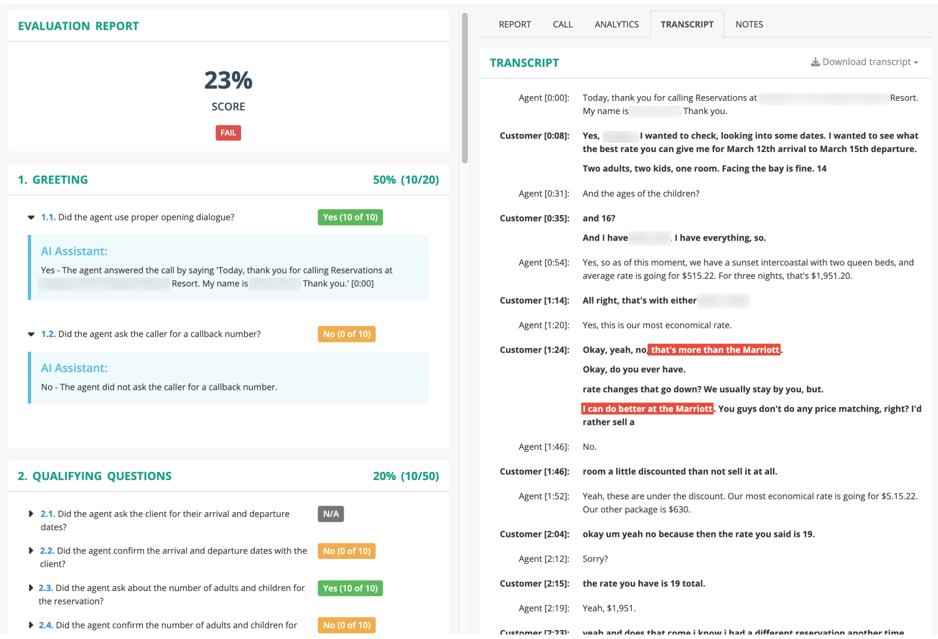
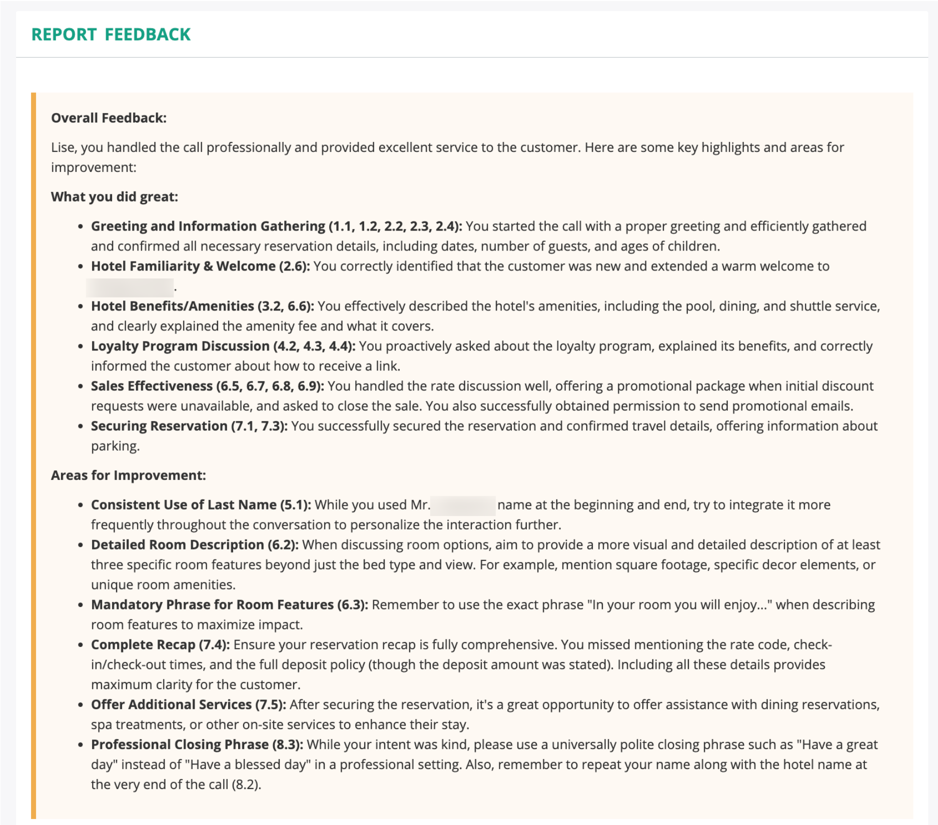


Figure: Auto QA report showing scorecard results alongside the conversation transcript.

Providing feedback

If you disagree with an Auto QA result, you can provide feedback:



REPORT FEEDBACK

Overall Feedback:

Lise, you handled the call professionally and provided excellent service to the customer. Here are some key highlights and areas for improvement:

What you did great:

- **Greeting and Information Gathering (1.1, 1.2, 2.2, 2.3, 2.4):** You started the call with a proper greeting and efficiently gathered and confirmed all necessary reservation details, including dates, number of guests, and ages of children.
- **Hotel Familiarity & Welcome (2.6):** You correctly identified that the customer was new and extended a warm welcome to [redacted].
- **Hotel Benefits/Amenities (3.2, 6.6):** You effectively described the hotel's amenities, including the pool, dining, and shuttle service, and clearly explained the amenity fee and what it covers.
- **Loyalty Program Discussion (4.2, 4.3, 4.4):** You proactively asked about the loyalty program, explained its benefits, and correctly informed the customer about how to receive a link.
- **Sales Effectiveness (6.5, 6.7, 6.8, 6.9):** You handled the rate discussion well, offering a promotional package when initial discount requests were unavailable, and asked to close the sale. You also successfully obtained permission to send promotional emails.
- **Securing Reservation (7.1, 7.3):** You successfully secured the reservation and confirmed travel details, offering information about parking.

Areas for Improvement:

- **Consistent Use of Last Name (5.1):** While you used Mr. [redacted] name at the beginning and end, try to integrate it more frequently throughout the conversation to personalize the interaction further.
- **Detailed Room Description (6.2):** When discussing room options, aim to provide a more visual and detailed description of at least three specific room features beyond just the bed type and view. For example, mention square footage, specific decor elements, or unique room amenities.
- **Mandatory Phrase for Room Features (6.3):** Remember to use the exact phrase "In your room you will enjoy..." when describing room features to maximize impact.
- **Complete Recap (7.4):** Ensure your reservation recap is fully comprehensive. You missed mentioning the rate code, check-in/check-out times, and the full deposit policy (though the deposit amount was stated). Including all these details provides maximum clarity for the customer.
- **Offer Additional Services (7.5):** After securing the reservation, it's a great opportunity to offer assistance with dining reservations, spa treatments, or other on-site services to enhance their stay.
- **Professional Closing Phrase (8.3):** While your intent was kind, please use a universally polite closing phrase such as "Have a great day" instead of "Have a blessed day" in a professional setting. Also, remember to repeat your name along with the hotel name at the very end of the call (8.2).

Figure: Feedback option to flag incorrect Auto QA results for review.

6. FAQ and Troubleshooting

6.1 FAQ

What is an "AI insight" in Call Recording?

An AI insight is a structured piece of information extracted from a conversation transcript/thread (for example: summary, sentiment, topic, CSAT). Many insights also include a short explanation to support human review.

Why do I see an explanation?

Explanations are designed to make AI output more transparent. They help you confirm why the AI assigned a value and find supporting evidence in the transcript/thread.

Can I change how the AI works?

Most users cannot. Changes to prompts, filters, and enabled insights are handled by your organization's administrators. See the **Conversation Analytics – Administration Guide**.

Why does a score not match what I personally think?

AI insights are inferred from conversation content and can be affected by:

- transcript quality,
- limited evidence (short conversations),
- your organization's scoring definitions,
- changes in prompts or thresholds over time.

Use the explanation and transcript evidence as your first check.

Why can't I see certain dashboards or fields?

Access is usually controlled by role/permissions. If you believe you should have access, contact your Call Recording administrator.

6.2 Why Data Might Be Missing

If you don't see insights (or dashboards look empty), it usually means one of these conditions is true.

Quick checks (start here)

1. **Check the time range.**

Dashboards and lists often default to a recent window.

1. **Check filters.**

You may have filters applied (agent/team/channel) that exclude the data you expect.

1. **Open multiple conversations.**

If only one conversation is missing insights, it may be a content/quality issue.

Common reasons insights are missing

1) No transcript/thread available

For calls, AI insights require a transcript. If transcription failed or is not enabled, insights may not run.

2) Processing delay

Insights are often generated by background processing and may not appear immediately after a conversation ends.

3) The insight is not enabled for your organization

Some insights are optional and must be enabled by an administrator.

4) Eligibility filters exclude the conversation

Admins can set filters for insights (for example: only inbound calls longer than 15 seconds). If a conversation doesn't match, it won't be analyzed.

5) Permissions/visibility restrictions

Your role may not allow you to view certain fields, dashboards, or conversation details.

What to do next

- If **one conversation** is missing insights: review transcript quality and length.
- If **many conversations** are missing insights: contact your administrator with:
- example conversation IDs/links,
- date range,
- which insight(s) are missing.

Your admin can check:

- whether the relevant AI Tasks are enabled,
- whether filters are excluding conversations,
- whether processing is healthy.