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A Buyer's Guide to Conversation Intelligence

Everything you need to know about evaluating conversation intelligence solutions to drive revenue and coach teams

How will this guide help you?

It's never been more difficult for businesses like yours to drive systematic sales and quota attainment. With teams working in a remote or hybrid capacity, it's tough to get reps on the same page and help them adapt to breakneck change. Leadership teams need better visibility and evidence from the field. Most businesses don't even know if the sales motions, talk tracks, and best practices they're rolling out are adopted or driving desired business outcomes.

That's why an effective conversation intelligence solution plays a key role in helping you make sense of customer conversations so you can hit revenue goals and address unmet needs.

Whether you're using an existing tool but considering a new approach, or you're just starting to explore options, this guide makes it easy to evaluate conversation intelligence solutions.

You'll find out about:

1 Capabilities that can increase the impact of your programs

2 Pitfalls to avoid

3 Key evaluation criteria to consider

Capabilities that can increase the impact of your programs

What is conversation intelligence?

Conversation intelligence is an AI technology that helps you automatically record, transcribe, and analyze all of your sales calls and web meetings to generate powerful customer insights and coach sales teams.

How does an effective conversation intelligence solution help you?

An effective conversation intelligence approach not only empowers you to get visibility and insights from customer conversations, but also provides you with the built-in training, reinforcement, and practice workflows you need to coach top-performing reps.

Two-thirds of companies feel that their enablement programs fall short. Conversation intelligence is often the missing link, as failed programs are not rooted in real-world customer evidence.

Why the need for conversation intelligence?

Sales leadership and executives can't pinpoint blockers that reduce productivity and have limited visibility into how customers feel about new products and services.

Revenue teams' lack visibility into what happened between customers and reps, making it difficult to collaborate and prepare for specific deals across accounts.

Enablement leaders are unable to demonstrate examples of winning behaviors in their training programs, and can't measure the impact of their efforts on business outcomes.

To help you succeed, we'll address the challenges you can solve, capabilities you need, and the common pitfalls to avoid when evaluating conversation intelligence solutions.

Desired capabilities:

Individualized, high-value analytics and reporting. Nearly every function at your company can benefit from and use conversation intelligence — from sales leadership, to product, marketing, managers, reps, enablement, and operations. Look for a solution that makes it easy for each type of user to find the calls they need and specific moments within them without thinking. Pay attention to transcription accuracy and the usability of charts and graphs. Help your team tell powerful stories with conversation data.
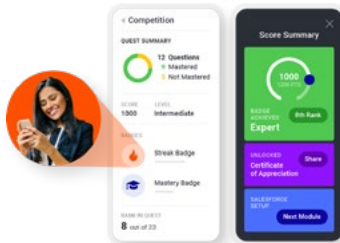
Sales-focused engagement mechanics. Face it: your reps have serious tool fatigue. Instead of throwing another tool at them, make conversation intelligence fun and motivating. Use it alongside other engagement techniques, such as live quizzes and role-plays. Allow them to not only see how they performed, but proactively practice. Celebrate small wins.

Built-in assessments and remediation. Conversation intelligence will undoubtedly shed light on things that need improvement. Don't stop at insight gathering. Look for a solution that helps you assess reps' knowledge and run immediate, personalized coaching and remediation programs.
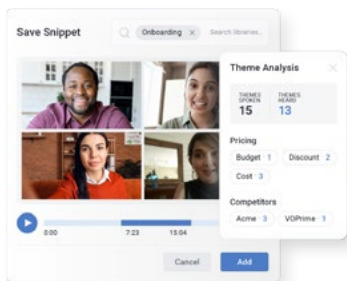
Preparation using conversation intelligence. Rather than spending lots of time looking back at what already happened, focus on the future. Look for a solution that helps your reps collaborate on next steps and action items right within transcripts, as well as securely share call transcripts and snippets with customers, product, and marketing.

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Pitfalls to avoid

There are some approaches that are less adaptable and, thus, less long-lasting and useful. Avoid pitfalls like these:

Focusing on deals more than people. Conversation intelligence provides powerful insights into key deals and accounts. But building a business deal by deal won't scale. Instead, look for a solution that helps you uncover the ideal competencies that lead your top reps to crush quota and achieve sales outcomes. We call those "winning behaviors," and we use data from real conversations to model them out.

Having too many tools and siloed workflows. Without simple, cohesive, and integrated workflows, insights are hidden in siloed solutions. Instead of "frankensteining" your sales tech stack, look for a solution that uses conversation intelligence as an engine that fuels everything else. For example, use the insights you get from customer conversations to inform other workflows within your sales content management system, sales enablement tool, or CRM. Or, better yet, ensure your conversation intelligence tool is part of a comprehensive sales readiness platform that unifies all these capabilities into one single interface.

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Key evaluation criteria to consider

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Mindtickle capabilities checklist

Below is a comprehensive checklist of items you'll need in order to put a best-in-class conversation intelligence solution in place.

Capability	Exists today	Roadmap
Deal Coaching		
Sentiment analysis	●	
AI-powered call scoring	●	
Email analysis		●
Next step and action item detection	●	
Mobile app	●	
External call sharing	●	
Core Capabilities		
Automatic, highly-accurate recording and transcription	●	
Call and web conference analysis	●	
Call themes and trackers (out-of-box and custom-built)	●	
Keyword search	●	
Snippets and libraries	●	
Individual and team reports	●	
Deal coaching and collaboration	●	
Call stats and insights	●	
GDPR compliance	●	

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Capability	Exists today	Roadmap
Skills Coaching & Remediation		
Recommended content and training programs based on calls, including missions and snippets		●
Remediation for skill gaps and gamified sales challenges, including role-plays, challenges, quizzes, and assessments	●	
Built-in coaching tools and workflows	●	
"Coach the coach" manager analytics	●	
Integrations and Data Export		
Salesforce integration	●	
Freshworks integration		●
Zoho integration		●
Pipedrive integration		●
Data export	●	
Support & Professional Services		
150+ enterprise customers	●	
Dedicated CSM	●	
Onboarding, training, and best practice playbooks	●	
Unlimited call and transcription storage	●	
Multi-thousand user deployments	●	
Customized product configurations	●	

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Why Mindtickle?

Instead of settling for insights that don't actually change rep and manager behaviors, modern sales organizations use Mindtickle to put insights to work. With Mindtickle, every call and program is constantly evaluated against results, ensuring that the whole team is driving toward business outcomes and that reps are set up for success. That means:

- **Chief revenue officers, leadership, and operations** can get access to customer insights, performance reports, and dashboards in one place. Rather than focusing on deals, they can get a macro view of how every program and person in the sales organization is performing. Then, they can empower teams to act immediately on those insights through built-in AI-driven coaching, reinforcement, and practice exercises.

- **Enablement leaders** can tie real-world evidence from calls into enablement programs to get a true picture of rep readiness. Now, they can measure the impact of their programs and inform new curriculums with voice-of-customer insights. At the same time, they can bring these insights into other platforms like CRM or sales content management systems.

- **Sales managers** can quickly ramp and coach reps more effectively in the field by using call scores to measure performance against winning behaviors. Then, they can focus their remediation efforts through built-in quizzes, assessments, role-plays, and challenges. They can also inspire self-coaching and peer coaching, as well as collaborate on specific deals and accounts – right within call transcripts.

- **Sales reps** can get access to all of the transcripts and collaboration tools they need to better prepare for deals. At the same time, they can participate in highly engaging AI-driven enablement programs that are personalized to their individual needs.

What is Call AI?

Call AI, Mindtickle's conversation intelligence solution, is a part of the Mindtickle Sales Readiness Platform, which helps revenue teams be ready to engage the market with purpose and close deals with confidence. Mindtickle combines multiple solutions — including sales enablement and training, sales content management, conversation intelligence, sales coaching, and analytics — to create a unified approach to readiness.

> The recordings and transcripts provided by Call AI are a prime piece of business intelligence for me. This allows me to coach my team to more wins and emphasize what's working for us. We've been able to increase quota attainment by 200%."

Greg Myers
Regional VP of Sales, Turing Video

> With Call AI, our entire team is a part of important customer conversations. We share snippets from important calls internally, which helps us improve our product, enable the team on new pitches, and get advice on how to move forward on a deal. We have been able to onboard our new reps 20% faster and improve our win rates on complex deals."

Richie Khandelwai
Co-founder, PriceLabs