

THE ULTIMATE BUYER'S GUIDE

Choosing the Right Conversation Intelligence Platform.



Table of Contents

Introduction	03
Buying CI: What You Need to Know	04
Defining Conversation Intelligence (CI)	04
How can CI help me and my team?	07
Which features & functionalities should my CI platform have?	09
Questions to ask while evaluating CI vendors	10
When is the best time to invest in CI?	14
Why Choose Chorus?	15
6 Reasons to Choose Chorus	16
Conclusion	18

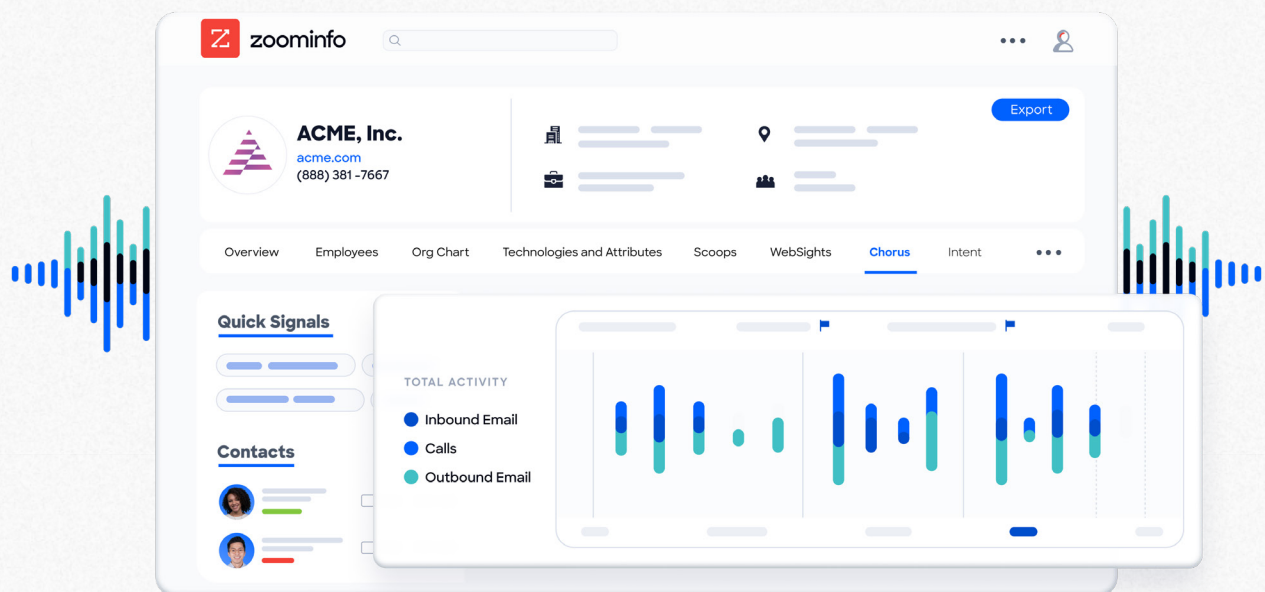
Introduction

Today's go-to-market leaders need every edge they can get to unlock market insights, engage prospects and customers, and grow faster.

And for the top sales and marketing teams, artificial intelligence (AI) tools have quickly moved from experimental to mission-critical. Conversation Intelligence tools can satisfy both imperatives, helping GTM teams identify opportunities, share winning tactics, and close deals more efficiently than ever.

In this guide to choosing the right Conversation Intelligence (CI) platform, you'll learn more about:

- How CI can help you build a predictable revenue engine
- How AI helps deliver CI insights with increasing precision and speed
- Features and functionality to look for in a leading CI platform
- How CI technology can support everyone on your GTM team
- Indicators that it might be time to invest in CI technology



Buying CI: What You Need to Know

Defining Conversation Intelligence

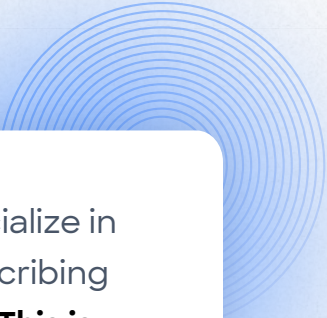
At its most basic, Conversation Intelligence software records and analyzes calls with prospects and customers to derive critical insights into buyer momentum, customer satisfaction, and team performance.

But top CI solutions go much further than call recording, allowing go-to-market (GTM) teams to capture and analyze customer interactions across platforms and contexts to gain a complete picture of what's happening in your customer relationships.

Capture customer interactions:

Most CI vendors will capture calls, meetings, emails, and support tickets. All of these touchpoints along the customer journey are considered customer interactions.

CI solutions should be able to capture conversations from calls and meetings effectively and provide accurate transcripts, flag next steps, and provide insights into deal velocity. Are key decision-makers still not involved in a late-stage opportunity? Top CI tools can pull that insight out of a long-developing sales motion and quickly highlight the deal risk for everyone involved.



Some vendors specialize in capturing and transcribing calls and meetings. **This is known as call recording**, and some vendors focus solely on this feature. While call recording is incredibly important, it's not the same as CI because it doesn't provide any AI-based insights, analytics, or recommendations. It leaves all the heavy lifting up to you.





Gain a complete picture of the customer relationship:

With one system capturing the entire customer relationship – from the first cold call through renewal – you can enjoy a deeper understanding of each relationship. CI lets you get ahead of opportunities or potential risks and pitfalls by knowing if the right stakeholders are involved in a deal, whether reps are discussing the right topics, and how your customer relationships are evolving over time.

Drive predictable revenue and outcomes at scale:

Generally, CI solutions focus on providing insights across three main categories:

- 1. Team performance insights:** CI can level up your sales team performance by finding hidden improvement opportunities for sales reps – without having to sit through endless call reviews. AI-powered solutions like Chorus can proactively provide sales and enablement managers with coaching recommendations so they can focus their time where it matters most.
- 2. Deal and account insights:** CI solutions can surface unparalleled insights from customer and prospect calls by flagging specific keywords or recognizing discrete deal stages. Want to push it further? Use Chorus Smart Playlists to automatically add fresh calls to your queue based on stage, keyword, and other criteria.
- 3. Market insights:** Embed the voice of the customer into all parts of the GTM operation by using CI to distill the features, competitors, and pain points common to your most critical deals.



Hang on, what about Revenue Intelligence?

Revenue Intelligence (RI) is basically CI, but focused on optimizing deal and account insights for sales teams. You'll miss out on performance and market insights if you only select an RI solution.

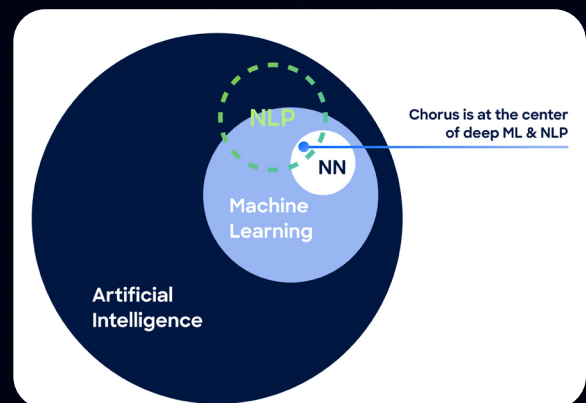
AI: The present and future of sales tech

AI, or artificial intelligence, is suddenly a part of every executive's roadmap – or will be soon. How can it help your go-to-market team today?

There are very basic versions of AI, such as sales tools capturing next steps based on keywords. However, there are also more sophisticated models and algorithms, like machine learning (ML) or natural language processing (NLP), that enable the tech to understand the context of what is being said.

While you're still capturing next steps, NLP (unlike simple AI) could discern the difference between "I'm going to the dentist at 2 p.m." and "I'll set up a follow-up meeting for 2 p.m."

The best platforms are also incorporating generative AI. For example, Chorus' new generative AI meeting briefs turn a call transcript into a detailed summary of action items and key discussion points – sent automatically to meeting participants and even the CRM after the call has wrapped.



How Can CI Help Me and My Team?

Driving team performance

CI can help you increase team performance, sales effectiveness, and process efficiency – and enable your team to focus on revenue-generating activities instead of mundane tasks.

Outcomes you can expect include:

- Identifying and replicating winning behaviors
- Up-leveling team skills
- Reducing new-hire ramp time
- Driving process methodology and adherence

Maximizing revenue & preventing risks

With CI, you'll know whether your team is focused on the right activities. You'll gain visibility into what's stalling or driving your revenue growth, allowing you to forecast more confidently & accurately.

Outcomes you can expect include:

- Mitigating deal or churn risks
- Understanding deal momentum and health
- Guaranteeing relationship continuity
- Getting complete and unbiased CRM data

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When doing deal reviews and pipeline forecasts, I need to feel confident that I'm accurately projecting our closed-won opportunities. Chorus has been a game-changer for me and enables me to confidently position my work to all of our executive leadership.

Michaela Downs

Head of Sales

Operations, Benchling



Making Better Strategic Decisions

CI also lets you bring the voice of the customer (VOC) into every decision you make, so you can validate assumptions and create actionable strategies for revenue growth – and enable customer obsession throughout your organization.

Outcomes you can expect include:

- Understanding shifting market dynamics
- Gaining competitive insights (and getting ahead of other contenders)
- Making data-driven roadmap decisions
- Using the VOC to inform messaging and content

Broad ROI across the CRO's org chart

Depending on which team you sit on and what your goals are, you may focus more on one of the three value drivers outlined above. Here's how we've seen our customers make the most of CI across their entire GTM organization:



Which Features and Functionalities Should My CI Platform of Choice Have?

Now that you understand the importance of CI, how do you actually evaluate the different vendors and solutions out there? Generally, prospective buyers should assess each vendor across the following five areas:

1. AI capabilities and the underlying technology foundation
2. Reporting and analytics capabilities
3. Ability to integrate with your existing tech stack
4. Ability to adapt to the unique needs of your entire GTM team – for example, business development reps (BDRs) vs. account executives (AEs)
5. Professional services and customer support provided

There are also some key features and functionalities you'll want to look out for:

Table Stakes

- Automatic call recording or call importing
- Transcription
- Keyword search
- Keyword trackers
- Activity dashboards
- Filtering (by rep, date, deal stage)
- Speaker identification
- Integrates with CRM systems
- Privacy compliance

Advanced Features

- AI-based trackers that detect topics with precision
- Ability to customize trackers
- Analytics tied back to deal progression and/or outcomes
- Ability to create custom views based on filters
- Same room/same line speaker separation
- Complete view of deal and account relationship
- Custom field and custom object creation in CRM
- Proactive AI-based coaching and deal recommendations
- Ability to view CI insights where you work (CRM)



Questions to Ask While Evaluating Conversation Intelligence Vendors

While this all sounds quite simple, the devil is in the details. That's why we created this handy question bank to help guide you when evaluating different CI vendors.

Understand the underlying technology

Start by understanding each vendor's approach to building their underlying AI layer. Some vendors have built and trained their AI models and algorithms in-house to reduce false positives and increase accuracy. Others have chosen to outsource this crucial step. What's the difference? Typically, outsourced models won't be trained on the same fidelity of data. This means that the AI models can detect next steps, but they might not be able to distinguish between key differences, such as the type of follow-up or nuances about dates and times. Chorus has analyzed over 40 million sales calls to optimize our insights.

Consider asking:

- How are your AI models trained?
- What's the data volume used to train your models?

Know what type of trackers are used

There are two types of trackers commonly used by vendors: keyword and AI-based trackers. Keyword trackers can only recognize exact words or sentences. AI-based trackers can understand the context and surface general themes, such as next steps, pricing discussions, and objection handling. AI-based trackers learn your business language and get smarter over time. Keyword trackers will surface the same results, regardless of how many calls you've logged.

Consider asking:

- Do your trackers rely on keyword mentions?
- How many out-of-the-box trackers are included?
- Can I easily add, remove, and customize trackers?



Ensure your platform will give you actionable insights

Consider which analytics are important for you, then find out what type of analytics are offered by each vendor. There are different approaches. Some vendors focus more on surfacing data points while others go a step further and tie the insights to outcomes. At Chorus, every insight category is tied to an outcome, so you know if a certain skill or topic can be tied to win/loss or deal stage progression. With this, you will know how certain competitor mentions or feature requests are affecting your win rates. Another thing to consider is where you want to consume these insights, which could inform the types of integrations you will want to ask about.

Consider asking:

- Can your platform tie skills and conversation topics to deal outcomes? If so, how?
- What type of analytics categories are available to me?
- Can I personalize my analytics dashboard?
- Will I be able to push these CI Insights into other platforms either via API or direct integration?
- Can topics be tied and automatically toggled to stage progression, not just win rate?

Discover what types of personalized experiences are offered

Understand if a vendor's platform supports the entire revenue team or only parts of it. Some vendors have specifically designed their platform around one group, such as account executives or BDRs. Others have built platforms that support the entire revenue team. Chorus provides users personalized experiences based on their roles and goals.

Consider asking:

- Does your platform have different views and settings depending on the end user's role (e.g. BDR vs. AE)?
- Can I adjust my recordings or deals views to drill into specific teams, deal stages, reps and more?
- Can I track methodology or process adherence through your platform?



Check for integrations with your existing tools

From surfacing competitive mentions to receiving product feedback directly from the voice of the customer, there will be insights and conversations you'll want to share. Make sure to look for a vendor with a bi-directional connection that pulls and pushes data, and has a simple process for sharing customer interactions in order to fully integrate into your existing tools, such as your organization's CRM, email, calendar, dialer, workflow automation, and BI platforms.

Consider asking:

- Can I view CI insights directly inside my CRM?
- Can I easily share call snippets and set relevant permissions for sharing outside my organization?
- What third-party integrations does your platform support?

Understand the usability of your platform

Some platforms are more complex and require additional time to learn how to properly use them. This should not be a barrier for internal adoption. Ensure your revenue team will take advantage of the latest features by understanding the standard onboarding processes and what support you'll receive to prove return on investment with your CI technology.

Consider asking:

- How long does it usually take to onboard a team?
- How will you help me prove the ROI of the platform?



Identify Support Before It's Needed

It's important to work with a vendor that has an established support system. Understand what types of resources are available to you, such as a dedicated customer success manager or a learning platform to ensure your frontline teams can make the most of the system.

Lastly, think about how the vendor will complement your team's overall strategy and culture.

Consider asking:

- Will I have a dedicated CS manager at no extra cost?
- How often are EBRs conducted?
- Does CS build out custom training and adoption plans?

Why does transcription quality matter?

Transcription quality can greatly affect the quality of results you can expect from your CI platform. Consider these two hypothetical transcribed sentences from a sales call:

- "Great! And I'll follow up in two days about setting up a meeting with my colleague Stu, and I'll look into the ABC features you want more info on, too."
- "Great! And I'll flop in two daze about setting up a meeting with my collar stew and look into the a bee see feats ors you wanted morph onto."

If you want your transcriptions to resemble the first example, then you'll want to work with a CI vendor who has built and trained their AI models and algorithms in-house with domain experts. That approach ensures that the AI is trained on sales and customer conversations (not random samples), so that the CI solution can return far more accurate transcripts.



When is the Best Time to Invest in CI?

Most GTM teams decide to adopt CI when they've reached a certain level of maturity, be that their employee count, funding round, or organizational complexity. While there's no hard-and-fast rule for when it's time to invest in CI, we've generally seen teams do so when they hit **two or more of the following criteria**:

- Four or more frontline reps
- Teams spread across at least two locations and/or working remotely
- Various roles to support, including account executives, customer success, sales development reps, or solution engineers
- Experiencing or expecting high growth rates with rapid onboarding needs
- A strong reliance on your CRM system for accurate data and forecasting
- Multiple products and fast release cycles
- A desire to bring the VOC into every part of the organization

Now that you have a better sense of what to look for in a CI solution, and what to expect from a vendor, let's take a look at why Chorus may be the right fit for your GTM team.

Sales enablement analysts at Gartner note in a market guide that adopting CI early is a smart strategy:

“The impact of conversation intelligence is significant and should be implemented when teams grow to four or more sales reps. Between speed to value for sellers and their managers, ease of change management, user-generated best practice playlists, and the capability of closing the enablement feedback loop, invest in conversation intelligence early in a sales team's growth.”

Source: [Sales Enablement Market Guide 2020](#), TOPO, September 2020.



Why Choose Chorus?



6 Reasons to Choose Chorus

The CI space is crowded, and it's getting harder to evaluate vendors. At Chorus, we focus on a few core differentiators and values that drive everything we do.



01. Best-in-Class AI

The Chorus platform is built on a proprietary foundation of unmatched data quality that trains our best-in-class AI models, helping you and your team to start making better strategic decisions informed by accurate and dependable insights. Based on regular testing, our transcription accuracy is consistently 15+% better than the leading cloud service providers and any of our competitors.



02. Enterprise-Grade Platform

Whether you already are a global enterprise or aspiring to become one, it's imperative to have a solution that complies with all the latest security and compliance rules while also giving the flexibility to set rules and permissions based on your team's location and role. This is why Chorus has invested in building an enterprise-grade platform that will pass all your requirements with ease.



03. Personalized Experiences

Our personalized experiences offer flexibility to meet your team's unique needs to drive adoption and impact. Unlike other solutions, Chorus is built with your entire GTM team in mind, from BDRs to account managers. It also won't take long for your frontline reps to start reaping the benefits of Chorus – it begins with their very first call.





04. Actionable Insights

Chorus surfaces actionable insights that can be personalized to meet the specific needs of your team and business and maximize your limited time. While many solutions only provide activity insights, Chorus includes skills and topic analytics tied to deal stage progression or outcome. Now that you no longer need to sift through hundreds of calls and mountains of notes to get insights, everyone can devote more time to higher-value activities for the business.



05. Connected CI Philosophy

We pride ourselves on our connected CI philosophy. We can empower your organization to harness CI insights where your team already works. Whether it's seeing those insights directly in your CRM or sharing a snippet from a customer conversation via Slack, we're here to help maximize the value of your captured customer interactions with flexibility and scalability to hit your goals.



06. Trusted Partnership

At Chorus, we believe in building lasting relationships with our customers that are built on trust. To us, a trusted partnership means celebrating your wins with as much excitement as if they were our own. Chorus works to ensure our customers have continued success in using our technology – or and we welcome their input on how to keep improving it.

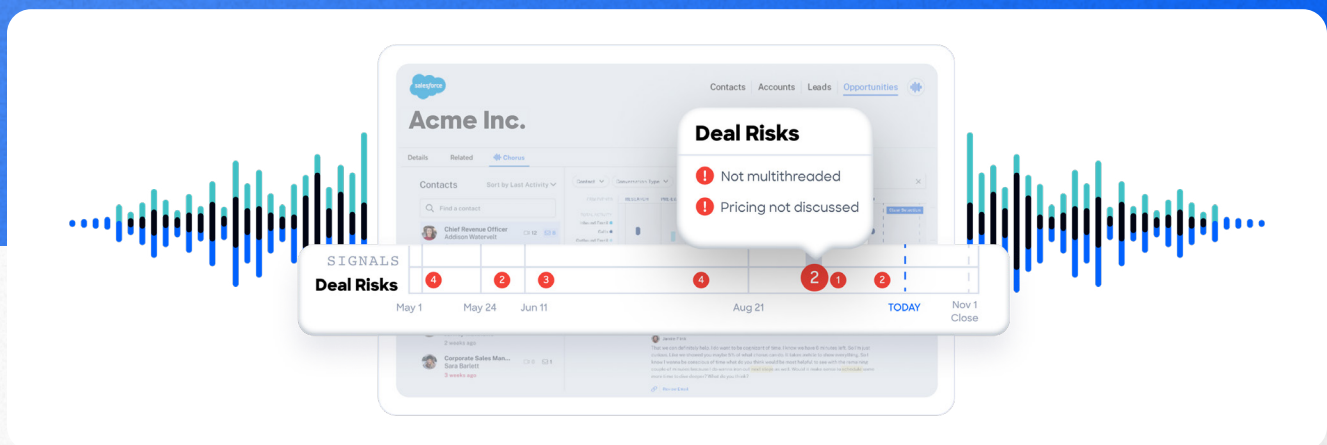


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**Our company strives for best-in-breed with our tech stack.
Chorus is definitely best-in-breed.**



Jim Johnson,
Enterprise Account Executive,
Xactly Corp



Listen, learn, win and repeat.

Conversation Intelligence is a major investment in the future of your GTM success. That's why the highest performing teams trust Chorus and ZoomInfo – two powerful solutions that work together seamlessly to blend your frontline team's performance and real-time signals with a wide array of contact data, intent data, proprietary research, automated outreach, and repeatable, customizable workflows.

Your GTM team doesn't exist in a vacuum, and your most critical tools simply can't be one-off solutions.

With Chorus and ZoomInfo, you get an unmatched combination of technical innovation, world-class business data, and next-generation technology platforms that allow you to unlock insights, engage customers, and grow faster.



Ready to find out more?

Get a demo

