

## Using Invoca Signal AI to Maximize Digital Marketing ROI and Improve Caller Experience

### Results at a Glance

**New visibility**  
into hundreds of  
monthly calls resulting  
in patient referrals  
using Signal AI

**3-minute reduction**  
in hold time

**Consolidation**  
of 1000+ campaigns  
into fewer than 100

VITAS Healthcare adopted Invoca's AI-powered call tracking and analytics platform to gain a better understanding of what's happening on calls to boost marketing ROI and help provide superior patient care.



## THE MISSION

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“We are helping people find the right care to preserve a loved one’s quality of life, and this makes phone calls with referring physicians, clinicians, and caregivers the lifeblood of what we do.”

VITAS is the leading provider of end-of-life care in the U.S. with over 40 years of experience in hospice care. Its mission is to provide quality of life for patients who have a limited time to live. To fulfill this mission, VITAS provides outstanding support and service to people, whether referring physicians or family members, who are helping place a patient or loved one in hospice care.

Given the seriousness of end-of-life care, VITAS must deliver a level of customer care and experience unparalleled by nearly any other business. Referring physicians and caregivers who are searching for the right hospice solution deserve a simple, seamless and personalized call experience.

“At VITAS, our marketing solutions must support and reflect the experience and quality of the care we provide,” said Jeff Stewart, assistant vice president of digital communications at VITAS. “We are helping people find the right care to preserve a loved one’s quality of life, and this makes phone calls with referring physicians, clinicians, and caregivers the lifeblood of what we do.” In order to accomplish this, VITAS needed call-tracking software that could provide more granular data and better visibility into campaigns, as well as IVR and custom call-routing capabilities to smooth any bumps in the customer journey.



## THE CHALLENGE

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VITAS' original call tracking solution lacked the granular data necessary to optimize their advertising campaigns and provide insights into the conversations and call experiences of their customers. "Our primary challenge in ROI is determining the success of a phone call through our call centers, as that measure indicates how many referrals we receive and where they originate," said Stewart. The previous platform also required manual call screening to pull out conversion data, which was extremely time-consuming and impossible to scale. With over 90,000 annual calls and growing, this was a big problem. "Our old platform was unreliable, and integrations never worked the way we wanted them to—it was just too hard to get the data we needed out of the platform." HIPAA compliance was also an issue, and resolving it came at a substantial additional cost. "Before we had Invoca, the analytics of our calls were nearly inscrutable."

The paid media strategy is market-based and required analysts to set up campaigns in the original call-tracking platform in a complex and time-consuming process. Each market required its own unique campaign, and any changes to the overarching advertising meant making hundreds of individual campaign modifications.

VITAS needed a call-tracking and analytics platform that could automate call conversion attribution, provide keyword-level attribution data, simplify paid local search campaign structure, integrate with their existing marketing technology, and meet their sophisticated security and compliance needs. "Invoca offered a high-tech, cost-competitive solution to our needs that met our evolving business needs and integrated well with our tech stack," Stewart said.

## THE RESOLUTION

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Using Invoca and Signal AI, VITAS continues to gain a better understanding of caller needs, grow ROI on marketing spend and improve the experience for callers.

### **Using Signal AI to automate call classification and gain new caller insights**

With Invoca Signal AI, VITAS has a clear picture of call activity, including what their families and referral sources commonly say and how they say it, without having to manually listen to calls. Before implementing Invoca, VITAS met with the call center to determine what words and phrases are commonly said on calls that convert to referrals. They set up Signals in Invoca to track those phrases and found that they returned extremely low results after tens of thousands of calls—people weren't saying those things at all. "It was totally different than what the call center had originally told us. For example, the word 'appointment' isn't even used when a referral is made, and we previously assumed that it was," said Stewart. "There's a distinct difference between our hypothesis of what people say on calls and reality, and that's a disconnect we can close now."

Understanding the voice of the customer, whether a healthcare professional, family caregiver, or even job candidate, and knowing the words they use to describe the services they require is key for all of VITAS' marketing initiatives, from identifying high-value SEO keywords and PPC queries to using data to guide their overall copywriting strategy. "Now we're learning more every day, and for us, understanding the voice of the caller is the key to marketing optimization."



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### **Invoca call routing and IVR improved caller experience**

Previously, calls that originated from local Google My Business listings were sent to receptionists who may not be able to reliably answer caller questions. They also found that up to half of the callers' time on the phone was spent on hold, with no updates on what was happening.

While VITAS' call centers undergo all of the training and calibration of any high-performing call center, self-scoring did not extend to transferred calls. VITAS now uses Invoca to record the whole call and create a much smoother experience for callers. By linking timestamp matching and other information from the digital experience, they are now able to match web activity with calls to develop a picture of the true patient experience and what can be done to improve it. "There's a long multifaceted patient story, and a lot of it happens on the phone, and over multiple calls. Now we can tie it all together," Stewart said.

### **Native integrations make data more actionable**

Under VITAS' previous platform, integrations rarely worked the way they were supposed to, making it difficult to take action on call data. "With Invoca, I feel confident that when a call ends, the data is transferred quickly and accurately," said Stewart. VITAS relies on Invoca to push call data and conversion signals through Kenshoo and Google Analytics to optimize their marketing campaigns. The marketing team also uses Hotjar with Invoca to track activity on the website and link it directly to individual callers. This clarifies the factors leading people to call from the website, including if they are having trouble with a particular webpage, so VITAS can route them to the department that can best assist them with fewer transfers.

### **Reduced campaign complexity**

VITAS was able to consolidate the number of campaigns it was running in its call tracking platform from around 2,500 to fewer than 100. This reduced complexity allows more nimble campaign modification and greater resource efficiency.

## **THE RESULTS**

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### **New visibility**

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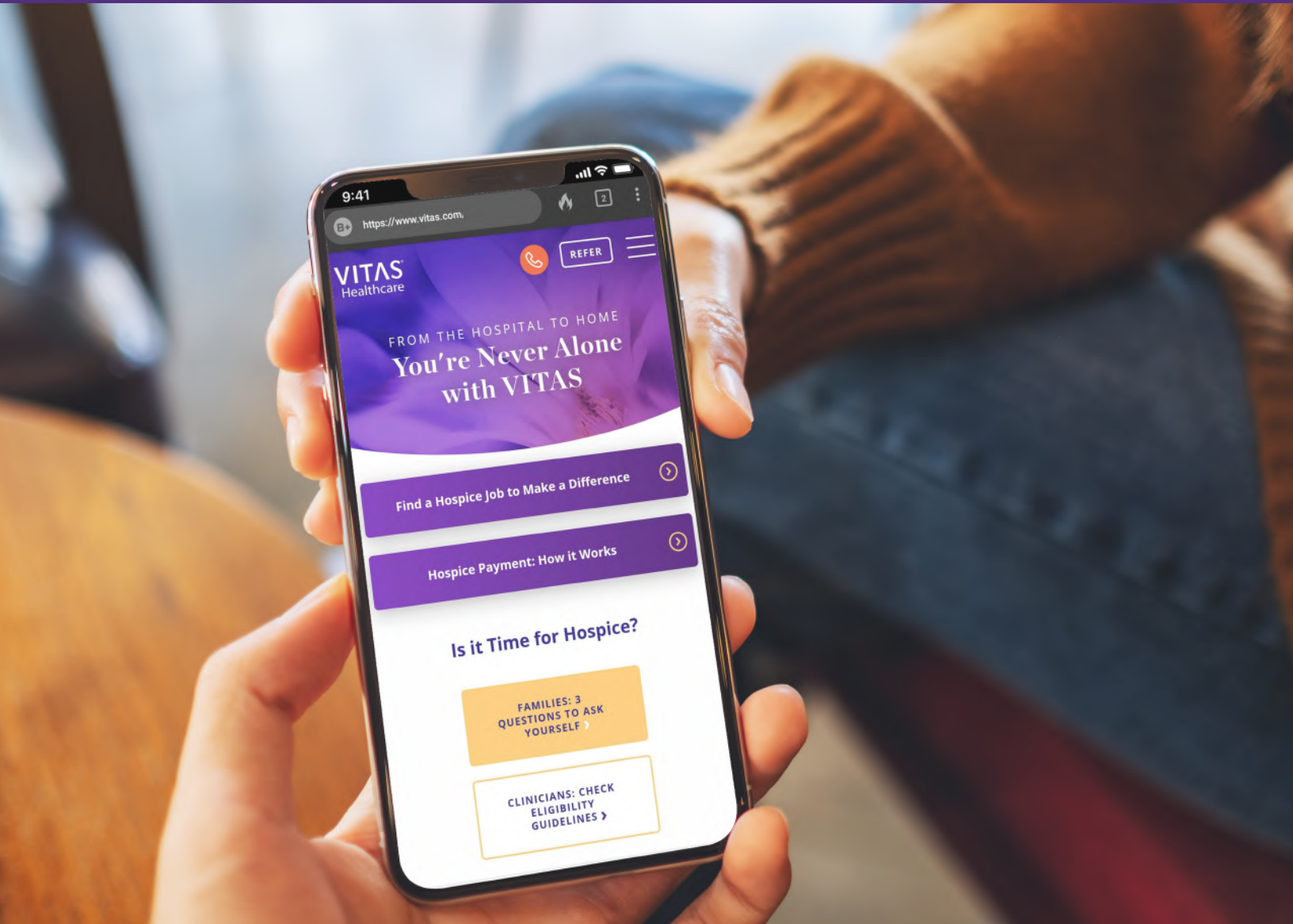
### **3-minute reduction**

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### **Consolidation**

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Learn more about how leading marketers are using AI-powered call tracking and analytics to drive revenue at [invoca.com/customers](https://www.invoca.com/customers).

