

# EXPERIENCE: FASTER GROWTH

2026 Guide to  
Driving Revenue through  
Better Phone Call Experience

ServiceScore<sup>®</sup>

# With challenge, comes opportunity.

The landscape continues to change and challenge business owners in new ways, at a faster pace.

From AI advancement to inflation to the changing workforce, the pressures are truly unprecedented.



# The bigger challenge?

With so many demands of our attention, finding the time to grow revenue and profitability is more difficult than ever. In planning for next year, business owners must find new ways to prioritize the activities and investments that will drive growth.

## Let's get started.

We begin with a better understanding of the heart of every business – the customer. By creating value from the very first interaction with the brand, we start the process of creating a customer for life.





# 2026 Business Planning

Savvy leaders are focusing on ways to better understand, measure and leverage the customer experience to drive growth. There are five critical growth goals that can be achieved through a smarter focus on customer experience:



**1. Balancing AI  
and Human  
Experience**



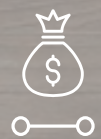
**2. Drive  
Marketing  
ROI**



**3. Harness and  
Leverage  
Data**



**4. Smarter  
Upskilling**



**5. Increase  
Profitability**

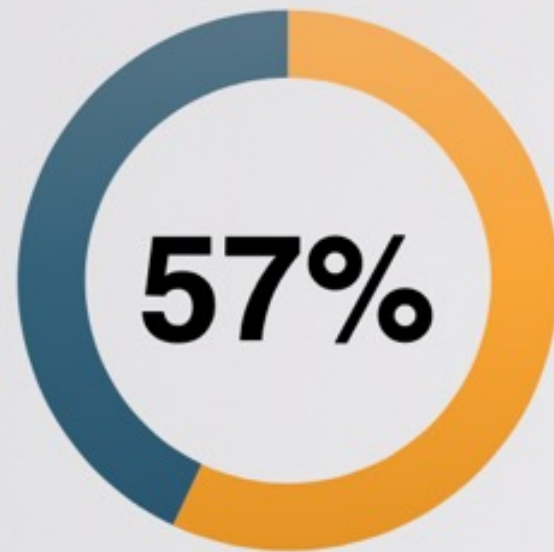
// **Ok, but why are we  
talking about phone calls?**



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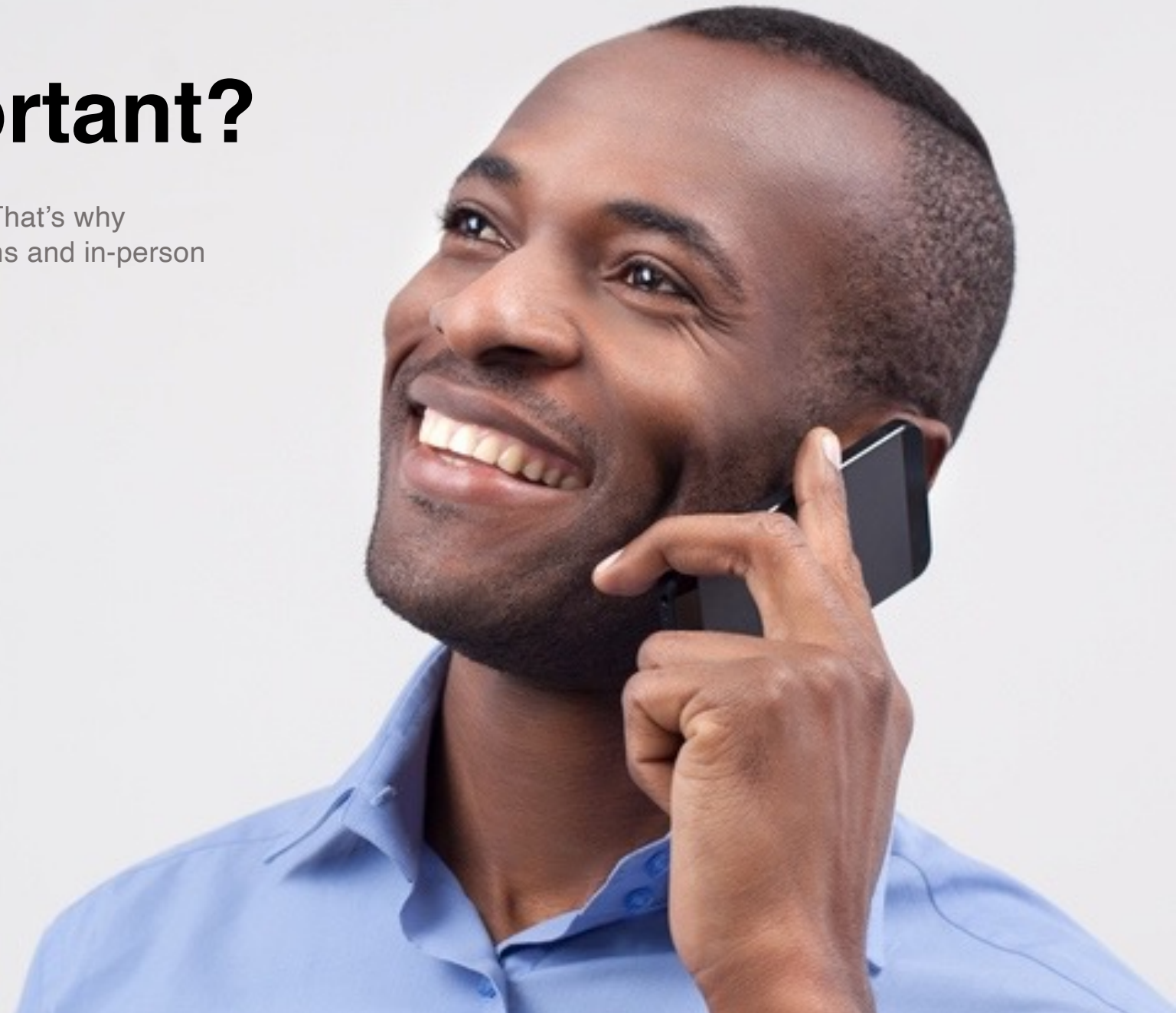
# Are phone calls still important?

Business phone calls matter more than ever, especially in the purchase phase. That's why marketers rate phone calls as the highest quality lead source, beating online forms and in-person interactions.



of mobile users call a business after searching on their phone because they want to talk to a real person

Source: Google, "The Role of Click to Call in Path to Purchase"



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# Customers have 8 experiences with your brand before they pick up the phone to call.

Source: Salesforce

## A WOW first impression builds trust.

After visiting your website, reading reviews and checking out social media, they're finally ready to talk to you.

A call the builds trust and expertise makes sure that everything you promise online is validated in their first human interaction with the brand – a phone call to your business.



# To fight rising prices, consumers are reaching out to new businesses.

With prices on most everything increasing over the past few years, people are reaching out to new businesses for the first time to get the best value.

While all businesses have this challenge, the smartest leaders are focusing on what's squarely in their control – the customer experience.

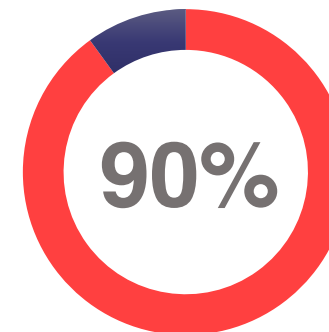


## 1. Balancing AI + Human Experience

# The Future of Great Phone Experiences: Where AI Meets Human Connection

For all the talk about digital transformation, the phone call still holds a unique place in customer experience. It's often the first live interaction a potential customer has with your brand — the moment where trust is built (or lost) in seconds.

Yet in an era when artificial intelligence and automation can answer faster, route smarter, and even anticipate intent, the key question isn't whether to use AI — it's how to combine it with authentic, human engagement that leaves the caller feeling heard and valued.



of callers would ask to speak to a real person rather than AI

Source: OnePoll, 2025, 6000 respondents

# Five Ways to Use AI for Better Human Experience

The best brands don't see AI as a replacement for empathy; they see it as a **force multiplier** for it. When technology handles what it does best — speed, accuracy, and efficiency — your people can focus on what they do best — listening, personalizing, and connecting.

- 1. Use AI to Anticipate the Caller's Needs Before the Conversation Starts:** AI-powered call routing and CRM integrations can identify repeat callers, recognize their recent activity, and automatically surface relevant details to the representative. When the human answers, they're already informed — no need for the customer to repeat themselves. That creates an immediate sense of care and competence.
- 2. Automate the Routine, Humanize the Response:** Let automation handle scheduling, confirmations, and FAQs, but make sure a live person is available the moment a question involves judgment, emotion, or trust. Customers appreciate efficiency, but they remember empathy. The transition between automation and human support should feel seamless, not like a handoff between departments.
- 3. Empower Reps with Better Coaching Tools:** Modern AI can summarize and transcribe calls, making it more effective to create coaching tools to improve outcomes. This doesn't replace training — it enhances it. By providing feedback on actual calls (using recordings, transcripts and focused coaching reports), you create consistency and confidence, helping every rep sound like your best rep.
- 4. Analyze Calls to Improve Both Technology and Team:** AI analytics can identify call patterns, sentiment shifts, and conversion bottlenecks, turning raw conversations into actionable insight. Use that data not just to refine scripts, but to **coach behaviors** — things like pausing before responding, personalizing recommendations, or closing calls with warmth and clarity.
- 5. Build Trust by Being Transparent About AI:** Customers may be comfortable interacting with AI — as long as they know what to expect. If an AI system is assisting or routing their call, say so upfront. Transparency builds trust, and trust builds loyalty. When customers understand that technology is enhancing (not replacing) the human touch, they view your brand as both modern and authentic.

**Bottom line:** The most effective customer experience strategies don't choose between AI and people — they design for both. The future of phone calls isn't just smart. It's **smart and human**.

## 2. Deliver Marketing ROI

# Are you getting the most from your marketing investments?

The change of pace in business and technology has dramatically reshaped the role of a marketing executive.

Today's leaders, at every level, need to be analysts, innovators and story tellers.

There's no time to be spent on unproductive data or investments that don't pay off.



**Lead Quality**



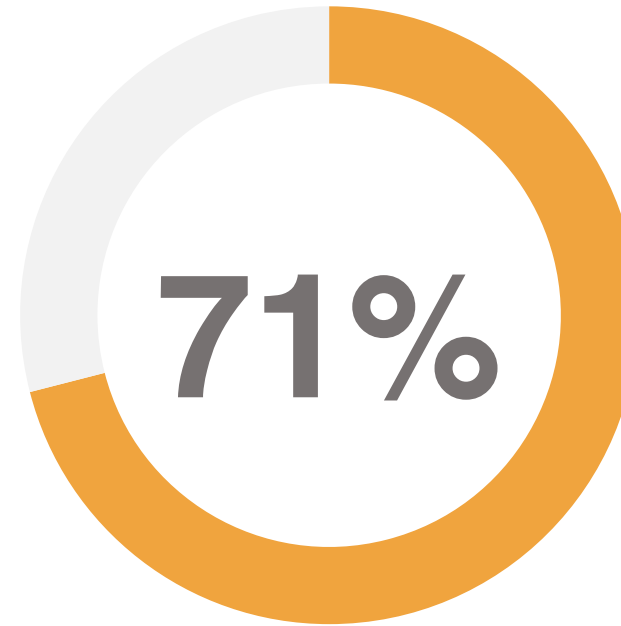
**Differentiation**



**Content Strategy**

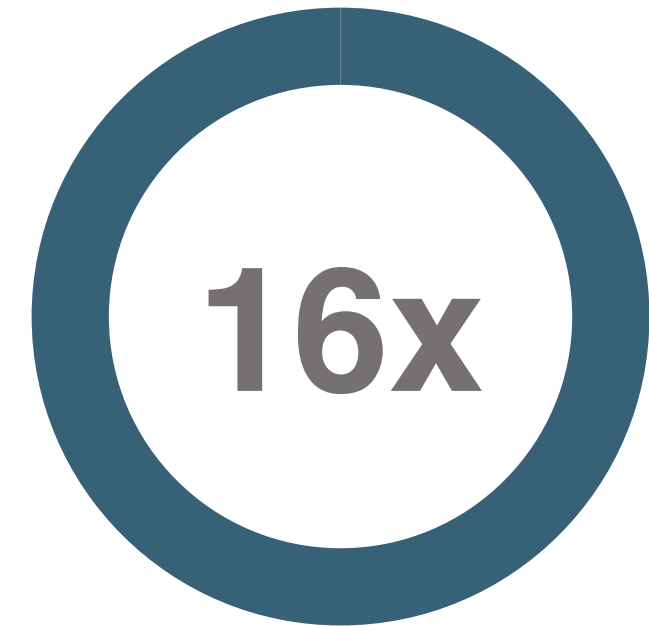
## 2. Deliver Marketing ROI

**Find out  
where your  
best leads  
come from.**



of home services consumers will call to make appointments directly from search ads.

Source: Google



The amount of time average consumer invests on a phone call vs. website interaction.

Source: Invoca

**And do more of that.**

Even though the customer journey usually starts online, most customers still prefer to call after they've done their research. It's just the easiest way to ask questions and take the next step.

For example, in home services, over 70% of consumers want to call to make an appointment after they've found the business online. And after they've done their research and are ready to buy – or at least learn more – they're willing to invest time. A recent study found that consumers spend an average of 16 times longer on a phone call vs. a website interaction.

## 2. Deliver Marketing ROI

**Make sure  
customers  
know why they  
should choose  
your business.**

### **Give callers a reason to buy.**

If a potential customer is calling your business, they likely need your product/service and have enough information about your company to consider doing business with you. But it's just as likely that yours isn't the only business they're calling.

How do you set yourself apart? It starts with asking Power Questions that get customers sharing about their needs or projects, which provides cues to build rapport and match what is unique about your brand to what is most important to your customers.



### 3. Leverage Your Data

## Lead with Data.

If phone calls are important in your customer journey, you probably already have servers filled with recorded interactions. Calls from toll-free numbers, pay-per-click ads and dynamically inserted numbers in digital advertising are usually recorded when a consumer calls or clicks through a website to call your business.

There's a tremendous opportunity to leverage these powerful service interactions to support staff coaching and marketing research.

Armed with insights, data and strategic recommendations based on actual phone calls, your brand can achieve breakthrough results in driving revenue, profit and an outstanding customer experience.



**Strategic  
Insights from  
the Customer  
Journey**

### 3. Leverage Your Data

# The easiest way to get five-star reviews? Outstanding customer service.

A recent study by Yelp showed that reviews that mention “Customer Service” were 15 times more likely to be five star than one star. This is the highest correlation between any aspect of the customer experience and five-star reviews than any other factor.

Customer service mentions in reviews cut both ways. While 75% of reviews that referenced good customer service were five stars, 76% of reviews that referenced bad customer service were one star.

## Customer Service Quality Influences Ratings

Ratings on Yelp reviews that mention good vs. bad customer service\*



\*Reviews that refer to customer service positively (e.g. “awesome customer service” or “exemplary customer service”) qualify as good customer service reviews. Those that reference it negatively (e.g. “terrible customer service” or “awful customer service”) qualify as bad customer service reviews.

Source: Yelp Chart: The DataFace

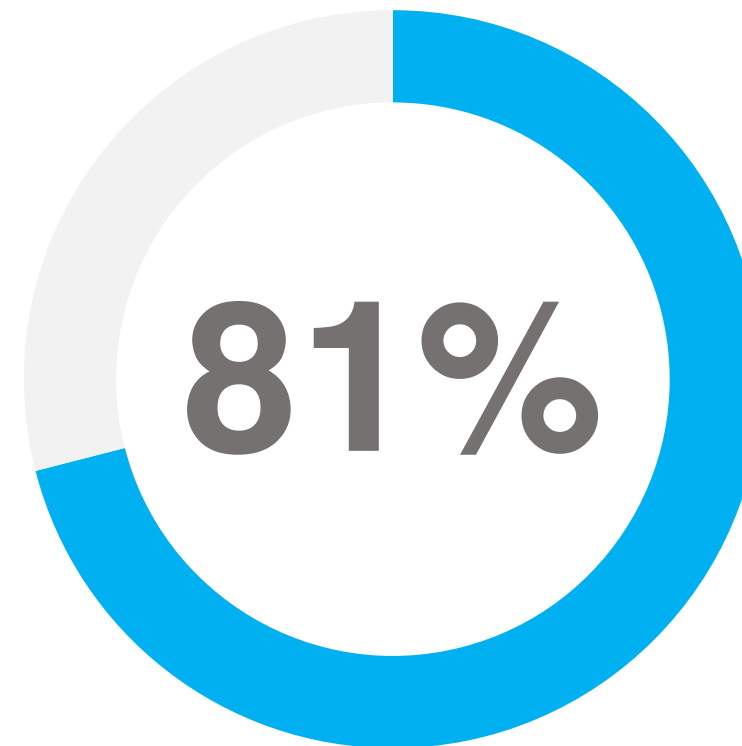
#### 4. Smarter Upskilling

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## Upskill to Up Your Results.

Upskilling is training that enhances a person's performance in their current role and prepares them to progress at their jobs. This approach gives employees the skills they need to take on new responsibilities within their position.

To drive better results, better retention and higher job satisfaction, savvy employers are investing more resources into helping existing employees grow in their roles.



Of employees say upskilling and training has boosted productivity at work.

Source: The State of Upskilling and Reskilling Training Survey

## 4. Smarter Upskilling

# Invest in upskilling where it matters most.

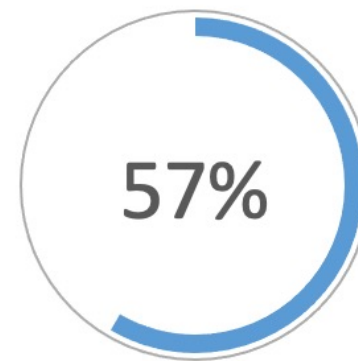
When it comes to “Customer Service”, there’s a million opinions on the millions of ways to do it “right”.

The better question to ask is what skills are holding you back from achieving the results you want from phone calls?

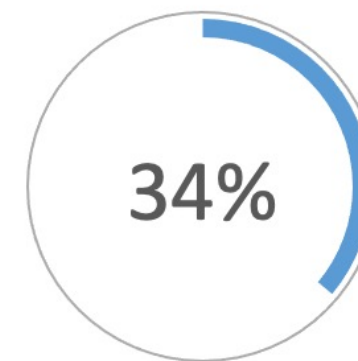
It starts by having objective measures of your conversion rates, including how often front-line team members are asking for the next step (appointment, sale) and how often that outcome occurs.

Then, dive deep into the objective reasons why calls aren’t converting. Focus your coaching on those top 2-3 skills that are missing from the unconverted calls and you’ll see a dramatic improvement in your conversion rates.

As importantly, you’ll see a huge improvement in employee satisfaction as their effectiveness and efficiency improve by practicing proven skills for success.



% CALLS WHERE CSR  
ASKED FOR AN  
APPOINTMENT



% CALLS  
CONVERTED TO AN  
APPOINTMENT

### Why Calls Didn't Convert?

The most frequent reason is that the caller wants to think about it



## 5. Drive Profitability

# The fastest, biggest and easiest way to drive profitability.

## Getting more from investments already made.

One of the most powerful results from increasing conversion rates is the impact it has on the bottom line.

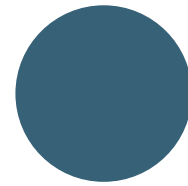
Investments in sales and marketing to make the phone ring – along with staff and systems to handle inquiry calls – are already made. Every additional caller who takes the next step from those same investments means a highly profitable result. After the variable costs of the product or service are covered, the rest drops right to the bottom line.



## 5. Drive Profitability

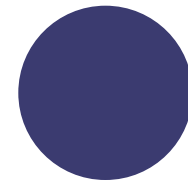


**Learning  
from your  
calls gets you  
more from  
multiple  
investments  
in your  
business.**



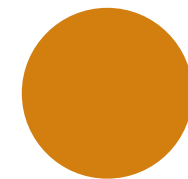
### **SALES AND MARKETING**

Knowing where your best leads come from helps direct the sales force and sharpen marketing investments. Moving dollars to channels that perform best, while focusing on messages that sell, help you beat competition and stretch budgets.



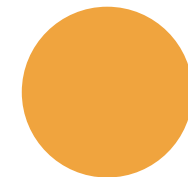
### **CONTACT SYSTEMS**

Whether it's taking a call on a cell phone or routing to a global call center, leveraging call analytics can create a higher return on the investments in phone call systems and people.



### **STAFF PERFORMANCE**

Great results from team members builds on itself. By praising effective conversion skills and coaching improvement areas, employees benefit from the investment of time that includes actionable data and insights.



### **INVENTORY**

You might have invested in a new product that's sitting in a warehouse or have excess capacity available with service staff. Either way, ensuring product is moving and that staff availability is matched with demand gets easier each time a new customer buys.

## 5. Drive Profitability

**Better  
performance  
means higher  
call conversion  
and so much  
more.**

### Bottom Line Results

Most businesses have a call conversion rate between 30-50%. Let's say a business gets 30 calls per week for new business – about 4 a day. Converting just one of these calls to new business at a customer value of \$200 delivers \$72,000 in added revenue – and most goes right to the bottom line.

You've already invested in the marketing, phones, people and rent – after direct product/service costs to serve this added new business, the rest is pure profit.

And better call conversion is just the beginning! Understanding and improving phone call performance helps drive upselling/cross-selling opportunities, new ideas for innovation, customer loyalty, more referrals and more.

Where else can you get this type of ROI?



# Let's build a plan to crush your 2026 goals.

## How we help:



**Call Performance  
Reports**



**Mystery  
Shopping**



**Customized  
Training Programs**