

# CUSTOMER EXPERIENCE PLAYBOOK

TOP WAYS TO USE RETREAVR



VOL.1

# TABLE OF CONTENTS

## E-BOOK INTRO

---

### 1. RETREAYER FOR *SOCIAL MEDIA*

---

Automatically Resolve Customer Service Issues	6-7
Collect and Use Phone Numbers in Campaigns	8
Optimize your social ads through call analytics	9

### 2. RETREAYER FOR *EMAIL*

---

Create and Track Offline CTAs for High-Touch Selling	11
Authorize Users with Minimal Resources	12

### 3. RETREAYER FOR *ENTERPRISE*

---

Customer support is personalized at scale	14
Segment Customer Groups Automatically	15
Pre-Qualify Leads to Increase Conversions	16
lead pre-qualification example	17
Manage and Allocate Call Center Assets More Efficiently	18

### 4. RETREAYER FOR *ADVERTISING*

---

Track Results and Drive Foot Traffic Through Direct Mail	20
Test Ads Against Each Other Down to the Ad	21
Attribute sales through phone down to the ad	22
Insert phone numbers into ads instantly	23

# E-BOOK INTRO

Welcome to Retreaver.  
To continue, press 1.

(Just kidding.)

Did you know the IVR (interactive voice response) system that dictates the customer experience over the phone was first implemented over 50 years ago? Without the ability to attribute or track the success and ROI of phone calls, it's no wonder they've fallen out of favor with digitally savvy marketers and organizations globally. Yet, so much of the world's business is still done over the phone – so many goals and metrics lie on the other end of a phone call, and how that call is handled will directly affect a company's bottom line.

We're Retreaver, and through our product suite of contact management solutions, we're bringing calls back into the marketing mix.

## What does that mean?

Retreaver is a cloud-based platform delivering new opportunities for enterprise-scale customer experience and sales through call intelligence.

## With Retreaver, you gain:

- Critical knowledge of a caller's current context and key data, sent along with every call for increased sales conversions and faster customer support resolution
- Intelligent routing for instant call center resource allocation based on caller segmentation and pre-lead qualification
- Integrated packaging of data into dynamic phone numbers, enabling phone calls to be tracked and attributed back to each user and original click, allowing for testing of ad efficacy and ROI based on numerous variables

We're the click to call to conversion company. The complete phone sales, customer experience, and marketing solution in one light-weight product.

Peruse this e-book to discover innovative ways our customers have implemented Retreaver around the world, and then get in touch with us to book your no-commitment trial.

**[www.retreaver.com](http://www.retreaver.com) | [@helloretreaver](https://twitter.com/helloretreaver)  
**1-866-898-7878 | [support@retreaver.com](mailto:support@retreaver.com)****

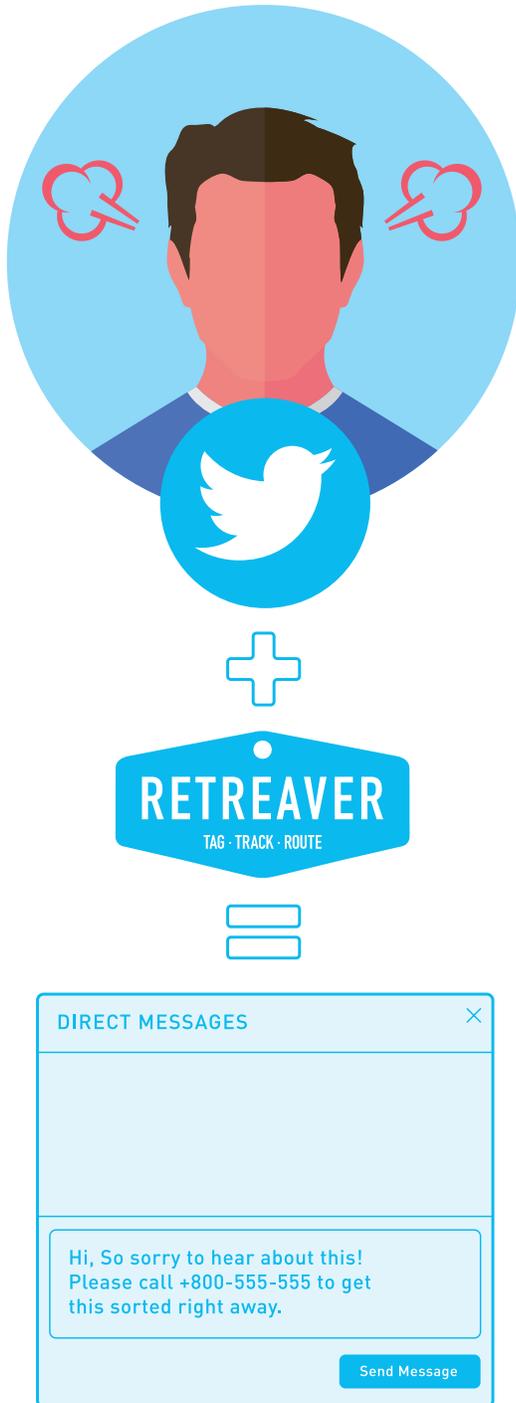
# RETREAVAR FOR *SOCIAL MEDIA*

---

1



# RETREAVAR FOR *SOCIAL MEDIA*



## AUTOMATICALLY RESOLVE CUSTOMER SERVICE ISSUES

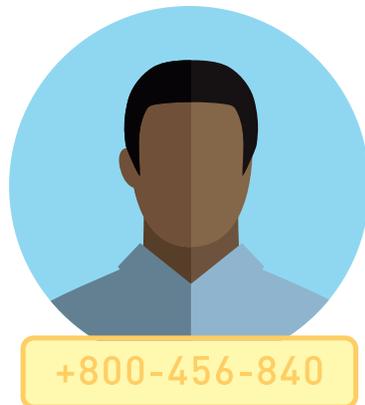
When you have people interacting with your brand on social media, Retreaver can ensure they get the help they're seeking quickly, with as few steps as possible between initial contact and solution.

Currently, when customers issue a complaint or interact with your brand on social, social media managers get the notification in a management tool like Hootsuite and then pass on the query to other departments, or provide a general customer service number. The customer ends up either in the same IVR tree or customer service queue they would have fallen into, or waiting for multiple departments to reply with a resolution, which, after several days, may or may not be satisfactory.

# RETREAVER FOR *SOCIAL MEDIA*



Retreaver can integrate with social media management tools in order to provide a dynamic call in number immediately – packaging the context of customer interactions on to their calls with intelligent routing to provide a response and resolution instantaneously.



When a customer interacts with your brand, a DM is issued for immediate support specifically for queries from that channel. Or, after qualifying information is given, Retreaver can issue a dynamic number that routes to an existing resource qualified to deal specifically with that query.



This results in a seamless experience for a social media interaction, linking your customer with the broad range of services and assistance available throughout your organization. Turn every call into a fast and personal experience.

## COLLECT AND USE PHONE NUMBERS IN CAMPAIGNS

If your content is popular on channels mostly consumed on mobile (Twitter or Instagram, for example) you can issue ads to collect phone numbers and then retarget those numbers with smart, no-spam campaigns through SMS or calls. Utilize the data your customers give you in order to provide personalized and targeted experience over the phone. Unleash the power of people by moving customers and prospects off of digital channels and into the high-touch environment of phone calls.



**TIP:** Possess many phone numbers already? Retreaver can segment those audiences and then automate communications campaigns sending personalized and timed content to each via SMS and phone.

## OPTIMIZE YOUR SOCIAL ADS THROUGH CALL ANALYTICS

Retreaver allows you to optimize your social media ads by including dynamic phone numbers suited to your target demographic. Choose your phone numbers by local or 1-800, content, channel, ad set, language, or anything else, Retreaver tracks the calls to see which numbers are working and how.

Conventional social media analytics do not go offline – with Retreaver, attribution can extend from online ads to calls and their results. Measure call length, conversion, numbers dialed, lifetime value of customers who called and more.

This is how Retreaver brings phone calls back into the marketing mix. Empowered with the knowledge from click to call to conversion, marketers are able to identify what works and what doesn't with certainty.

# RETREAVAR FOR *EMAIL*

---

2



## CREATE AND TRACK OFFLINE CTAs FOR HIGH-TOUCH SELLING

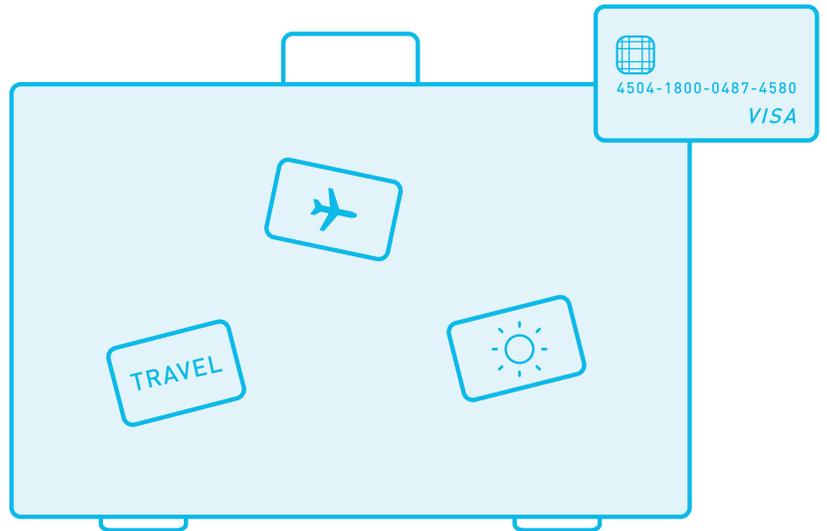
Think you'll do better selling on a call? Do you want to gather insight by speaking with your customers directly? Retreaver enables companies to dynamically insert appropriate numbers and call destinations directly into emails or other marketing communications.



**TIP:** If you are an enterprise that wishes to support its agents in local offices or franchises, Retreaver drives calls directly to the appropriate local agents that can benefit from your corporate marketing mix of mass communication with personalized phone numbers and offer codes.

# RETREAVER FOR *EMAIL*

## AUTHORIZE USERS WITH MINIMAL RESOURCES



Customers get urgent emails with requested call back phone numbers attached for a variety of reasons - maybe they're travelling and their credit card company wants to ensure the last purchase was not fraudulent. Perhaps they've signed up for a new account or made a large purchase online and the company would like to verify they are real. Or maybe they're travelling in the morning and the airline has urgent news about the flight or weather that they'd like to communicate directly.

Whatever the reason, Retreaver enables a company's customers to call back after receiving a brand communication and get routed exactly where they need to go immediately. By packaging information and context into dynamic phone numbers, as well as directives on where those calls get routed, Retreaver enables any organization to provide better customer experiences and offer friction-free, phone-in experiences at scale.

# RETREAVAR FOR *ENTERPRISE*

---

3



# RETREAVER FOR *ENTERPRISE*

## CUSTOMER SUPPORT IS PERSONALIZED AT SCALE

Retreaver issues dynamic phone numbers across web pages on a company's website, tagging and tracking the user throughout their customer journey. Retreaver then packages all known data into a phone number, routing the call based on known criteria (tags). The agent answering the phone sees this information and instantly understands context of the call, delivering faster, more personalized service.

Retreaver works with IVR systems and other technology and infrastructure already in place to deliver each call to the best place with the most relevant context attached. Integrations with CRMs and other marketing tools like Google Adwords, Salesforce, Zendesk, Eloqua, etc. allow Retreaver to pull and embed data immediately – tying each call into the integrated sales and marketing database.

CUSTOMER #9165  
DYNAMIC PHONE NUMBER  
555-282-9183



MARY SMITH, AGE31

PREFERS CALLS BETWEEN 8-9PM

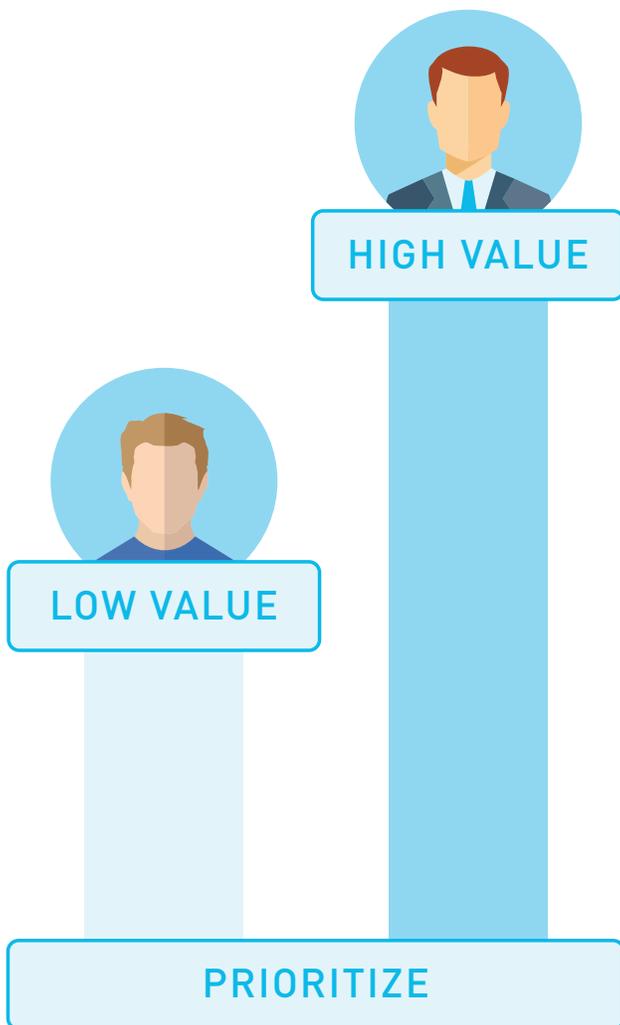
WANTS TO IMPROVE WIFI SPEEDS



CUSTOMER SERVICE

CALLED 8.30 PM

DATA SPEED SPECIALIST



## SEGMENT CUSTOMER GROUPS AUTOMATICALLY:

Use Retreaver to create a lightweight and flexible infrastructure meant to service customers from a specific geography, businesses versus personal, high-value versus low-value customers, or other criteria. If driving leads to specific groups or franchises, segmentation can ensure proper customer attribution whether by territory, need, or other.

# RETREAVAR FOR *ENTERPRISE*



FIRST VIST TO WEBSITE

SECOND VIST TO WEBSITE

FIRST CALL FOR MORE INFO



+545-265-186

CUSTOMER #9165  
DYNAMIC PHONE NUMBER

## PRE-QUALIFY LEADS TO INCREASE CONVERSIONS:

Lead pre-qualification is vital to saving time and resource costs if you are:

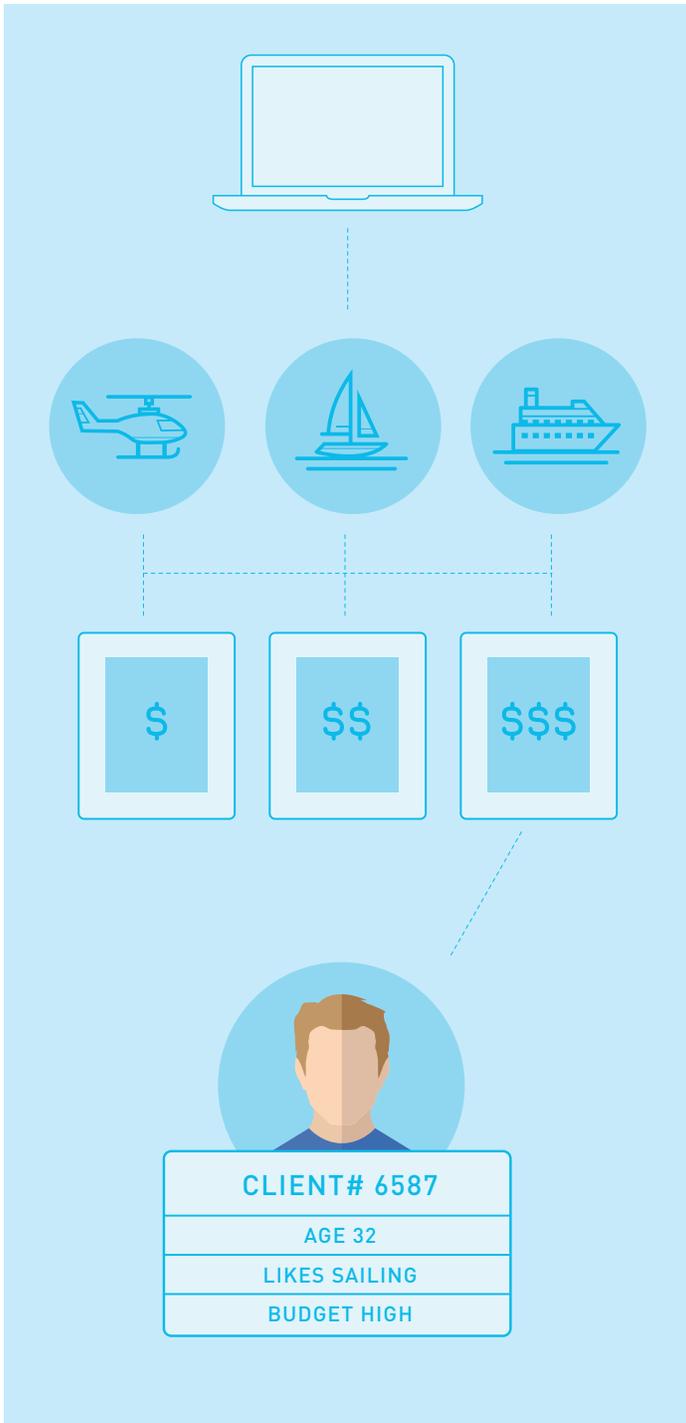
- passing along leads
  - managing a marketplace
  - connecting offers to buyers
  - optimizing a call center
- ...and more.

Pre-qualifying leads is a great way to make sure that you are using all the information at hand to drive a conversion. Retreaver ability to package and pass information makes this possible in an omnichannel world.



SEE EXAMPLE  
NEXT PAGE

# RETREAVER FOR *ENTERPRISE*



## LEAD PRE-QUALIFICATION EXAMPLE

A marketplace or website selling cruises would have multiple packages and tours to offer and varying prices. Using Retreaver, leads could be pre-qualified through landing pages, a call center, and other sources to ask about age, type of cruise preferred, destination, budget, etc. Using these tags, Retreaver would instantly issue a dynamic phone number driving that lead to the seller that best suits their criteria. The website, or publisher, can stick to creating and promoting the page itself, without worrying if the calls will be attributed to it or if the leads have been sent to the right place.

# RETREAVER FOR *ENTERPRISE*

## MANAGE AND ALLOCATE CALL CENTER ASSETS MORE EFFICIENTLY

With Retreaver, calls can seamlessly travel between the caller and, using our intelligence system for instantaneous context, a call center agent. Our routing system plugs into the intelligence we have on each customer and sends the call exactly where it needs to go, alleviating congested call center resources that may not be able to solve the request anyway. Our tracking allows for managers to quickly determine which call centers or agents are exceptionally efficient and how oversee phone operations. Retreaver also allows for the easy integration of new call center resources when working with enterprises that may need to expand quickly or only contract additional resources seasonally. With each number infused with context and information, each agent is empowered to treat their customers in a personalized way.



+800-565-000



+800-456-840



+516-486-974

### PERSONALIZATION AT SCALE

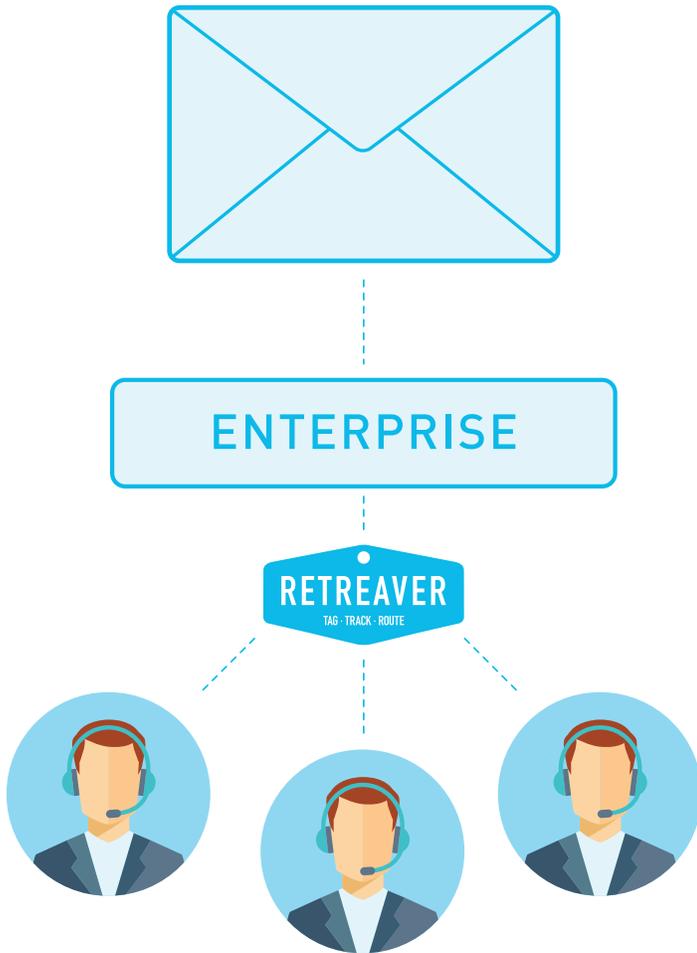
# RETREAVAR FOR *ADVERTISING*

---

4



# RETREAVR FOR *ADVERTISING*

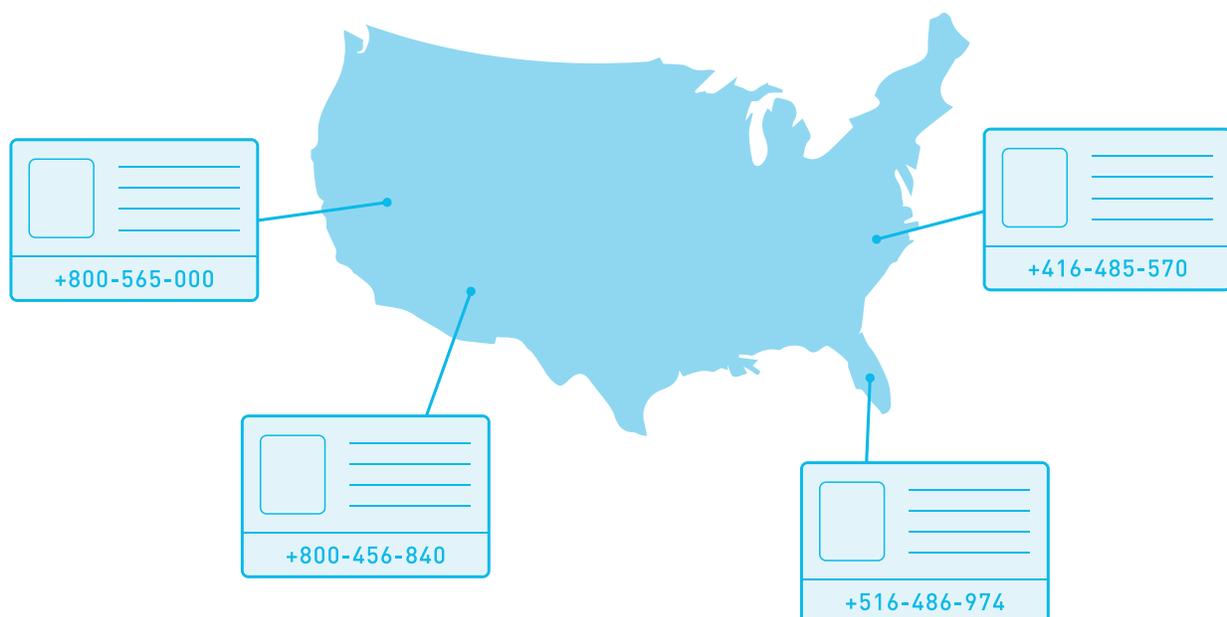


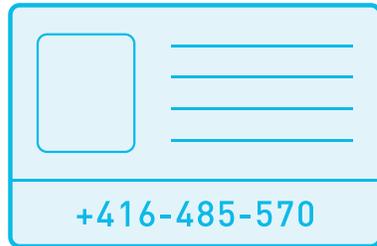
## TRACK RESULTS AND DRIVE FOOT TRAFFIC THROUGH DIRECT MAIL

Using flyers or other direct mail advertising? Retreaver provides phone numbers and coupon codes that allow customers to be directed to their local store or business and receive location-specific offers. Using the codes to route by a variety of variables, such as zip code, type of location, advertising content, etc. Retreaver then provides comprehensive analytics on the ROI of direct mail campaigns.

## TEST ADS AGAINST EACH OTHER DOWN TO THE CLICK

If you're producing multiple campaigns across email, display ads, and more, being able to identify which specific ads are driving results within the campaign is vitally important. Knowing the median results by campaign, especially when an offline conversion (like a phone call) is involved, just isn't enough. Retreaver's tracking and routing capabilities, as well as our integration with the world's most popular ad platforms, enable our users to view conversion reports down to the click and which ad it came from. No more bulky campaign reports – Retreaver provides the intelligence necessary to fine tune messaging, offers, and other advertising attributes based on click to call to conversion analytics.





## ATTRIBUTE SALES THROUGH THE PHONE DOWN TO THE AD

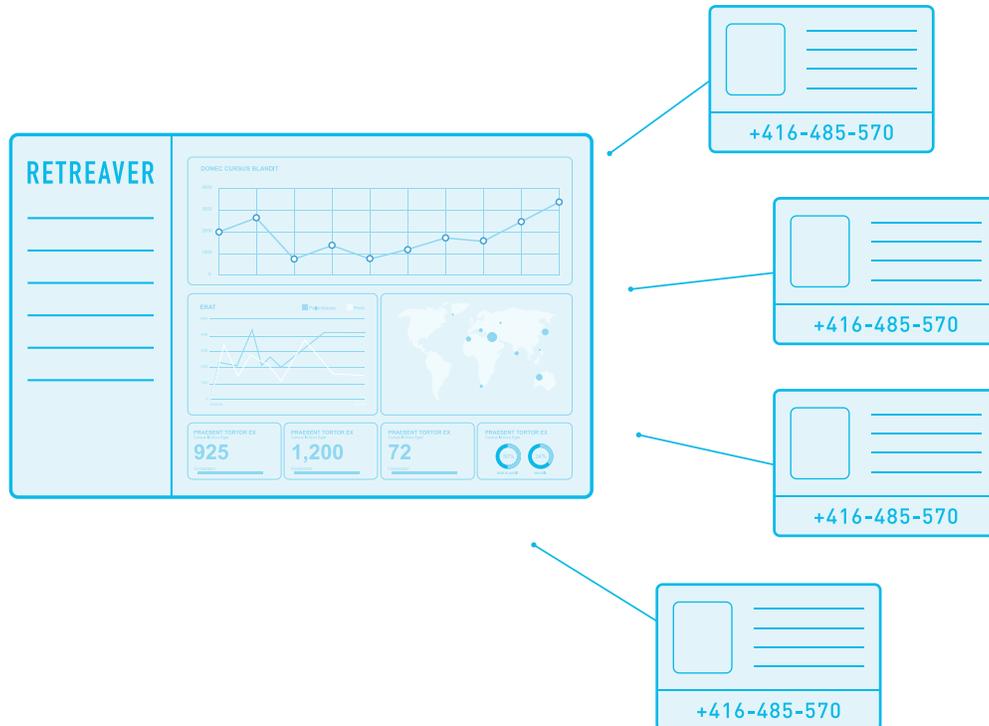
Use Retreaver integrations with tools like Google AdWords to track anything about phone calls down to the ad: Did the call convert? How long did it last? Where did it come from? Retreaver allows companies to answer these questions as well as what ad the call originated from.

Maybe one variety of content on a display ad received 100 clicks, while another only got 20. However, with Retreaver, you can match the calls and conversions to the ad – perhaps the call with fewer clicks actually had more calls that became sales, with higher-value customers?

# RETREAVER FOR *ADVERTISING*

## INSERT PHONE NUMBERS INTO ADS INSTANTLY

If you're tracking different campaigns for variables such as product, seller, and more, Retreaver can automatically insert phone numbers depending on necessary criteria. Have locations all over the country and want to offer local numbers? No problem. Have multiple locations in the same region and need to drive ads to all of them? We can issue a unique number for each to track the ensuing conversion. Use programmatic? We can handle it. Whatever the need, Retreaver has number pools that can automatically draw and insert numbers into your digital ads, at scale.



# TAG TRACK ROUTE

**WE BRING PHONE CALLS BACK  
INTO THE MARKETING MIX.**

Personalization at scale means intuitive sales, excellent customer experiences, and marketing ROI attribution that extends from online channels to the phone and on to anywhere in the world you do business. Retreaver finally makes it possible.

[WWW.RETREAVER.COM](http://WWW.RETREAVER.COM)  
[@HELLORETREAVER](https://twitter.com/HELLORETREAVER)



**RETREAVER: 866-898-7878**

# RETAIN CUSTOMERS. DRIVE CONVERSIONS.

Retreaver collapses the distance between customer need and conversion. Our innovative tagging technology is the first of its kind to collect information while travelling with customers across multiple channels and platforms. Approach every call with 20/20 vision of the immediate context and circumstances that triggered it. After the call, get precision-based reporting, measurement and analysis of performance metrics.

Retreaver turns the big data of customer interactions at scale into exportable, ready-to-use information. We make happy customers.

## FEATURES

Landing Page Display	International Numbers
Number Pools	Sub-Affiliate Tracking
Ring Groups	SIP/VOIP Support
Business Hours	Affiliate Network Integration
Multilingual Support	Analytics Integration
Interactive Voice Response	AdWords Integration

Retreaver uses dynamic phone numbers to create an information highway, where each customer gets their own lane. Our global solution instantly packages and delivers in-depth data about the details and motivations of each customer coming from websites, SMS, social media, and more.

## WHAT ARE YOU, PSYCHIC?

Retreaver enables everyone from internal sales and customer support staff to international call centers to approach each customer not only with static data but with dynamic context. Know what your customers wanted immediately before they called.

We solve the friction between customers calls and enterprise infrastructure through an invisible and lightweight solution. Agents around the world? No problem. Selling hundreds of different products and plans? We've got you covered. Using dozens of different channels for programmatic ad buying across thousands of sites? All the more reason to get Retreaver.



## CONTACT US

Toronto, Canada  
phone: (866) 898-7878  
support: support@retreaver.com  
sales: sales@retreaver.com

WWW.RETREAVR.COM

RETREAVR: 866-898-7878

[www.retreaver.com](http://www.retreaver.com) | [@helloretreaver](https://twitter.com/helloretreaver)  
1-866-898-7878 | [support@retreaver.com](mailto:support@retreaver.com)