

Labels & Tagging

Labels give you a flexible way to group and retrieve conversations and insights around themes, keywords, or context that your CRM does not already capture. Reach for them when you need a quick, focused way to pull together related records that would otherwise be hard to filter on.

How labeling works

- Apply a label to conversations or insights manually, in bulk with a run-once workflow, or automatically so that new incoming data is labeled as it arrives.
- Common uses include competitor mentions, focus groups, event-based calls, and special projects.
- Color-code your labels so your team can recognize them at a glance.

Creating and managing labels

- Go to Labels in the left navigation, choose the My labels or Team labels tab, click Create, then type a name and choose a color to save it.
- Click a label's name to open its detail page, where you can click the pencil icon to rename it, click the color swatch to change its color, or use the Actions menu to delete it or move it between My labels and Team labels.

Adding labels to insights

- Hover over an insight card on the Insights page to reveal the label icon in the bottom-right corner, then click it to open the label picker.
- Choose a recently used label, search for an existing one, or type a new name and choose a color to create and apply a label in one step.

Best use cases

- Tracking competitor names that come up in conversations.
- Tagging ad hoc research projects, such as "2026 Jan Focus Group."
- Marking special-case topics that are not stored in your CRM, such as "Pilot Program."

When not to use labels

- Data your CRM already captures. To segment something like "US Customers," use your CRM field filters instead of a label.
- Broad, catch-all tags. Keep each label focused on a single, clear purpose.

Reviewing your labels

- Periodically remove outdated or unused labels so your list stays concise and easy to work

with.

Tips

- Standardize how you title labels and share the naming convention with your team so everyone tags consistently.
- Use a label as an "inbox" for conversations you want to revisit or analyze in more depth later.

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