How insights are generated

Overview

An insight is a short, self-contained statement extracted from a conversation, written so you don't need to open the transcript to understand it. Names are removed from insight text, and every insight links back to its conversation. You can filter, label, and edit insights, group them into topic sets, and ask the Analyst about them. To browse, filter, and analyze insights, see Insights.

How extraction works

1. A conversation is captured and, if needed, transcribed.
2. Alchemer Voice checks the conversation is worth analyzing. Very short conversations, ones with a single participant, and ones where nobody from your side (your internal email domains) took part can be skipped.
3. Using the conversation's purpose (for example Sales, Support, or Customer success), Alchemer Voice extracts the insight types that suit it, plus a summary. A support conversation is analyzed differently from a sales call.
4. Insights appear under Insights and on the conversation's insights tab.

Processing uses your plan's analysis hours. Your company description in Admin > Company is used as background so statements make sense for your business.

Insight types

The types you see depend on how your workspace is set up. Business-to-business workspaces focus on the first five; workspaces set up for consumer customers focus on the last four. Your Alchemer account team can tell you which applies.

Type	What it captures	Sub-types
Jobs to be done	What the customer is trying to achieve, written as "I want to... when... so that I can..."	Functional (a specific feature), Non-functional (an overall ask), Deployment (rollout, customization, project management), Sales (deciding to buy, learning the product, contracts)

Type	What it captures	Sub-types
Pain and impact	Pains, challenges, and frustrations that brought the customer to you (Pain), and business or personal outcomes your product could affect (Impact)	Each marked Emotional or Rational. Rational examples: cash flow, costly mistakes, revenue, cost
Needs analysis	A short hand-off note from a sales conversation on what the prospect needs	Undiscovered Need (challenges they are unaware of or ignoring), Discovered Need (already addressing them), Buying Intent (actively researching solutions)
Solutions	What your team offered in response to a requirement	Feature (works as is), Customization (can be configured), Process (works if the customer changes process), or no fit
Features	Functionality the customer wants, written for product teams	Feature Request (doesn't exist), Feature Enhancement (exists, needs improving), Configuration Feature (needs more options), Service Feature (support or training that would help)
Forces of progress	Why a customer is moving toward or away from a change such as adopting, renewing, or leaving	Push (frustration with the current situation) and Pull (appeal of a new capability) encourage change; Anxiety (fear it won't work) and Habit (comfort with the existing way) resist it
Emotion	A concrete situation paired with the feeling it caused, for example "Being kept on hold for forty minutes makes me feel angry."	Eight primary emotions: joy, trust, fear, surprise, sadness, disgust, anger, anticipation
Customer effort	Friction the customer endured to get something done, for example "I had to call back four times to get a duplicate charge refunded."	Driver: repeat contact, channel switching, repeating information, transfers, emotional effort

Type	What it captures	Sub-types
Value	What the customer values about the product and why	Four tiers: Functional (saves time, reduces cost, reduces effort), Emotional (reduces anxiety, fun, design), Life-changing (hope, belonging, self-actualization), Social impact

Summaries and actions

Each processed conversation also gets a summary suited to its purpose. Support conversations also get follow-up actions.

Editing and removing insights

You can change an insight's text or delete it from the Insights page or the conversation. Deleting all insights for a conversation is available from the conversation's menu.

Things to know

- The number of insights per conversation varies with its length, how much was discussed, and its purpose, since each purpose looks for different types.
- Outliers are insights that didn't fit into any topic when you generated a topic set.

Permissions

Changing or deleting an insight, on the Insights page or in the conversation, depends on your role. See Roles and permissions.

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