AI Insights Onboarding

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Table of Contents

About this document

This document discusses the configuration, testing, and use of LeadDesk's AI Insights.

It is broadly divided into three sections:

1. **Getting started**
   Discusses the requirements for AI Insights to complete the setup.
2. **Configuration walkthrough**
   A comprehensive guide to using AI Insights to gather information about your calls, including advice for building questions and formulas.
3. **Gathering insights**
   How to use AI Insights to review agent performance, understand calls and create ad hoc questions to deep dive on issues.

1 Getting Started

Requirements

To use AI Insights you will need to activate two apps available from the LeadApp store:

- AI Insights itself.
- AI Transcriber premium subscription is also needed. Not only does this make transcripts available more quickly, but it also allows stereo transcripts, separating the caller and the agent.

In addition, the projects your agents are working on will need to have both call recordings and transcribing switched on, as described below

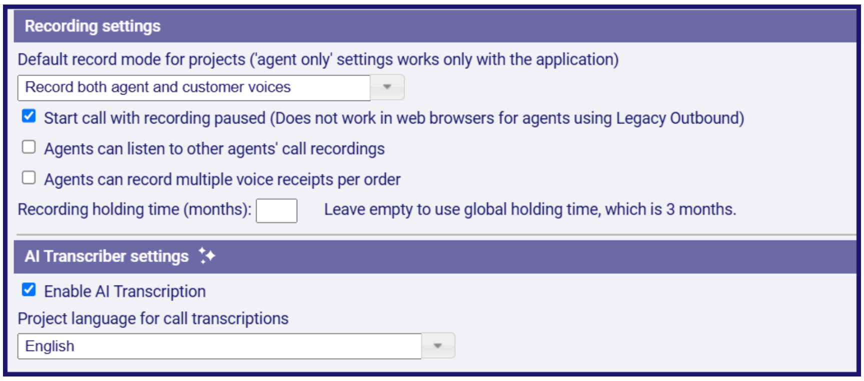
Both apps can be installed and configured by an Admin.

Enabling call recordings and transcripts

Project settings

In your Admin account, for each project you intend to use AI Insights with:

1. Go to the **Projects** page.
2. Go to the **Project list** subpage.
3. Click the **Name** of the project to edit its settings.
4. In the **Recording settings** section, click the **Default record mode for projects** drop-down and select **Record both agent and customer voices**. (You can select **Use the global project setting**, if the global setting records both sides).
5. If you want your agent to seek consent before recording, leave **Start call with recording paused** ticked.



6. In the **AI Transcriber settings** section, ensure that **Enable AI Transcription** is ticked.
7. Click the **Project language for call transcriptions** drop-down list and select the language used for most of your calls.

You can leave this setting as **Auto detect**, as the transcriber is able to detect the language used. However, if you can specify a language here, the transcripts will be of better quality. Better transcripts mean better insights.

8. Click the **Save** button to save the changes to the project.

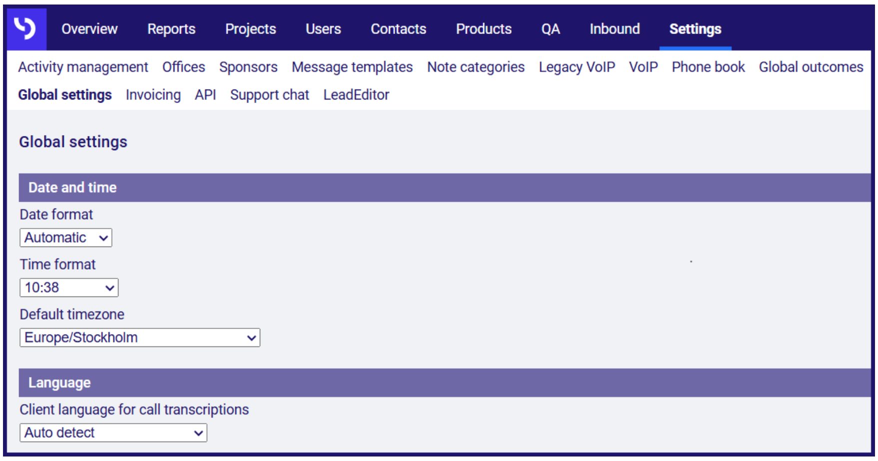
Global settings

You can also set the default language for transcripts globally.

In your Admin account:

1. Go to the **Settings** page.
2. Go to the **Global settings** subpage.
3. In the **Language** section, click the **Client language for call transcriptions** drop-down list and select the appropriate language.

As before, selecting the language used by most of your calls will give better transcripts, and that in turn gives AI Insights better data to work with.



4. Click the **Save** button to save changes to the settings.

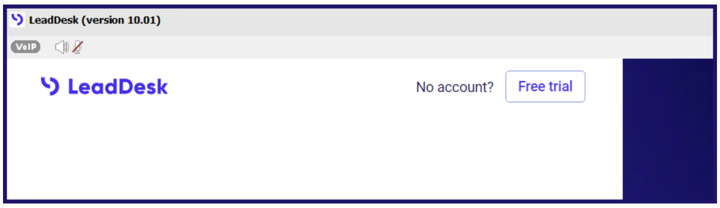
Agent settings

If you have agents that use LeadDesk through the LeadDesk Windows application, check that stereo recording is enabled for their calls. **Agents who use LeadDesk in a browser are not affected**.

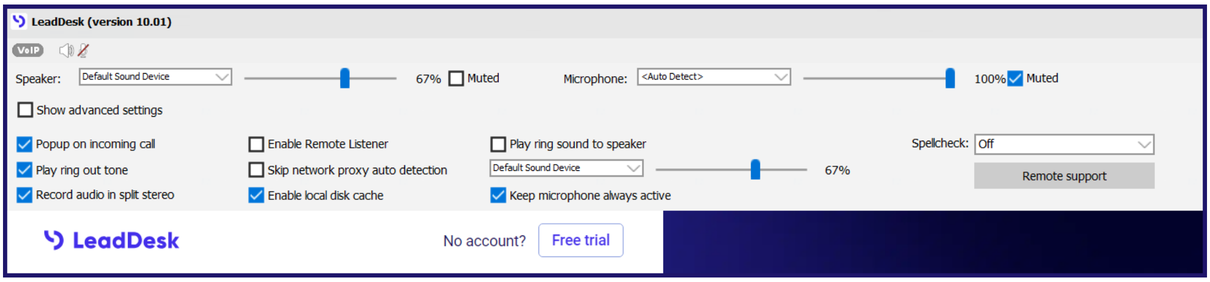
AI Insights needs call recordings to be created in stereo. As such, stereo recording will be enabled automatically for your client if you are using AI Insights, but agents using the LeadDesk Windows application can switch off stereo recording for their calls.

The agents should:

1. Click the audio controls button in the top-left of the LeadDesk Windows application window.



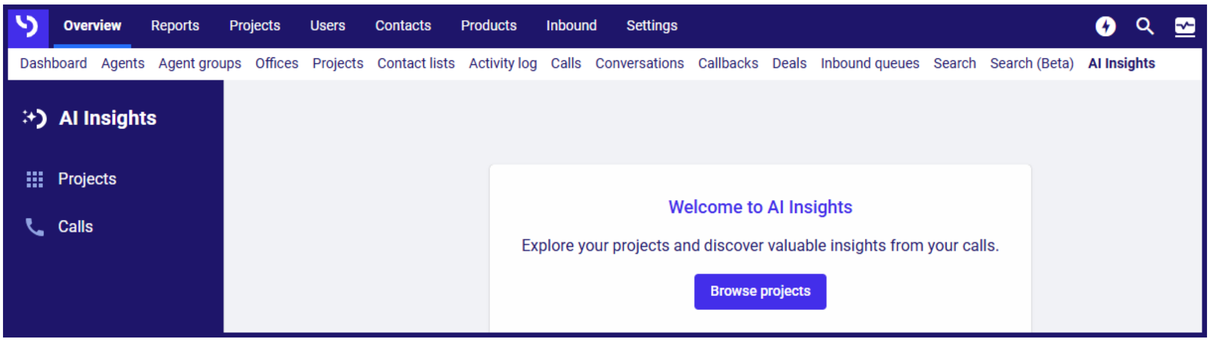
2. Ensure that the **Record audio in split stereo** is ticked.



Accessing AI Insights

In your Admin account:

1. Go to the **Overview** page.
2. Go to the **AI Insights** subpage.



From here, you can use the left-hand menu to select:

- **Projects** – to manage the questions associated with your projects.
- **Calls** – to find calls and see the insights generated for them.

2 Configuration walkthrough

Creating questions for a project

Before you can gain insights on any calls, you need to define the questions you want to answer. Questions are defined separately for each project.

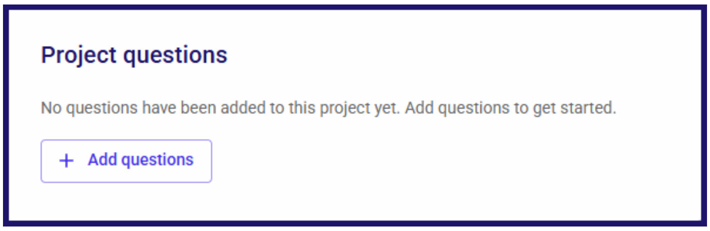
To define a set of questions for a project:

1. Click the **Projects** page in the left-hand menu (or click the **Browse projects** button if you are on the welcome screen).

You will see a list of your projects, showing its **Name**, **Description**, the number of **Agents**, and its **Office** (if any), as well as the **Time created** for the project. You can change the sort order of the table by clicking any of the column headings to sort the table on that column.

The **Insights** column will show a blue icon if there are existing questions for the project, or grey if there are no questions.

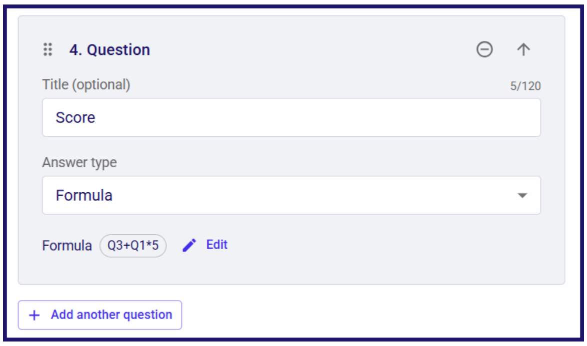
2. Find the project you wish to define questions for. If you have many projects, use the search to find the project you want to update.
3. Click the project you wish to add questions to.
4. If there are no existing questions for the project, click the **Add questions** button.



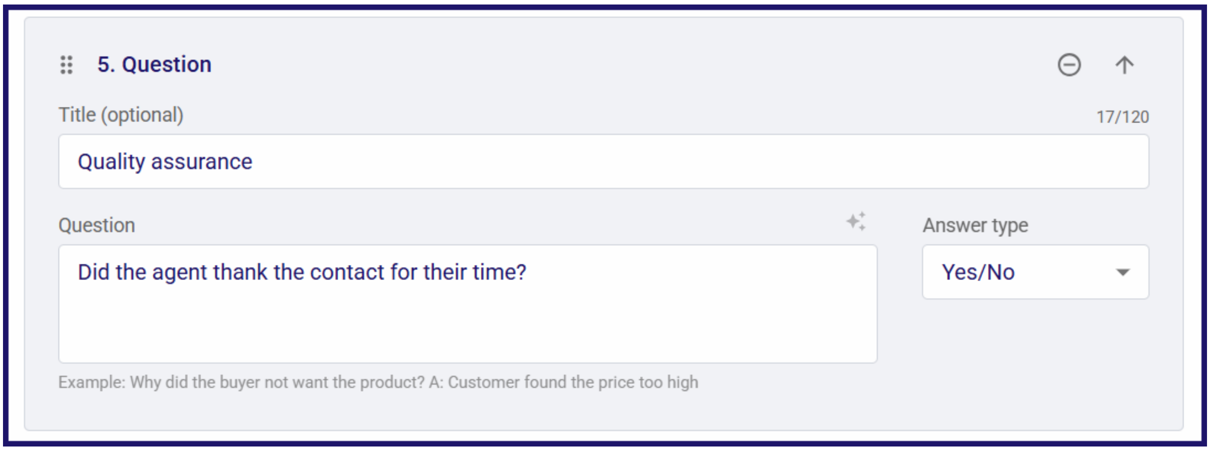
Alternatively, if the project already has questions defined, but you wish to add more:

5. Click the **Edit** button.

6. Scroll to the bottom of the list and click the **Add another question** button.



In either case, you will then need to create a question.



7. Optionally, type a **Title** for the question. If you have many questions, having titles will break up the results when you review them.
8. Type your question in the **Question** field.
9. Click the **Answer type** field and select the appropriate format for the answer. For more information on answer types, see the following section.

Carefully consider the way you ask the question, so that it suggests the selected type of answer

9. When finished, click the **Save** button, or click the **Add another question** button to continue writing questions.

Answer types

The effectiveness of AI Insights will be driven by how good your questions are. It is strongly recommended that you spend time planning the questions you want to ask, and the answers you want to get.

- **Freeform text**. The answer will be in the form of a few sentences.
- **Yes/No**. The answer will be Yes or No.
- **Numeric scale**. The answer will be a numeric value on a scale of 1-10.
- **Multiple choice**. Allows you to define a limited set of answers for AI Insights to offer.
- **Formula**. Calculate a numerical score based on the answers to other questions.

Constructing questions

Consider the type of questions you want to ask, and how you will use the answers.

It can be tempting to use a lot of questions with answer type **Freeform text**. As the only open answer type, it will provide a lot of information, but measuring and comparing freeform answers can be more time consuming.

- Instead of "How did the agent introduce themselves?" of type freeform, it might be more effective to ask a couple of **Yes/No** questions like "Did the agent give their name?" and "Did the agent state the purpose of the call?"

Be careful with mismatches between the question and the answer type.

- Sometimes the mismatch is easy to spot. Don't ask the question "Which colour product was discussed" with an answer type **Yes/No**!
- Other times it can be more subtle. You could ask what products were discussed in the call. You could make this **Freeform**, or ask a series of **Yes/No** questions, but a **Multiple choice** might focus the question on the options you are interested in.

Also consider if you want to use the answer to this question as part of a formula

- Formulas can only work with answers of type **Numeric scale** or **Yes/No**, so if you want to use the answer to a question in a formula, raise the question such that it can be expressed with one of these answer types.

Freeform text

Freeform text answers give you a chance to ask open questions. The answer will summarise the relevant information from the call transcript in a few sentences.

Freeform text answers let you dive into the *why* and *what* of a call, and *how* the agent handled things. "What did the customer call about?", "If the customer was dissatisfied, why?" or "How did the agent handle the complaint?", for example.

They are not directly used in performance metrics, and freeform answers cannot be used in formulas.

Yes/No

These questions are directly asking if something happened in a call. "Did the agent give their name?", "Did the customer express an interest in the product?"

If you use a **Yes/No** answer in a formula, a **Yes** will be treated as 1, and a **No** as 0. This might affect the way you ask a question. For example:

- "Did the agent give their name?" gives a Yes, if they gave their name, and will be treated as 1 in the formula.
- "Did the agent forget to give their name?" gives a No, if they gave their name, and will be treated as 0 in the formula.

Numeric scale

If you use the answer type **Numeric scale,** Insights will generate an answer with a value from 1 to 10. They are good for judging the quality or intensity for the call. "How effectively did the agent handle the customer's questions?" and "How engaged did the customer appear during the call?".

Don't be too broad with the question. "How good was the call?" would generate a result, but it may not be clear how "good" is being quantified. Better to be specific.

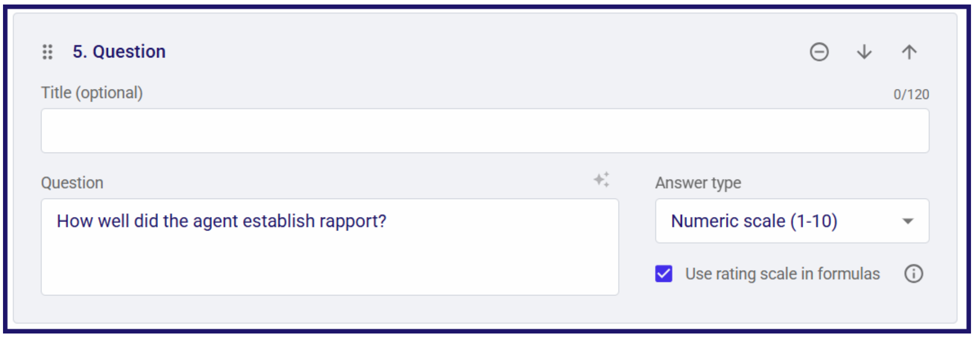
Numeric scale in formulas

The value generated by a Numeric scale answer type can be used in formulas.

However, if you intend to use this as part of a formula combined with **Yes/No** answers (which are treated as 0 or 1), a value of 10 can be unbalancing.

You can make a **Numeric scale** more balanced with **Yes/No** in a formula by optionally ticking the check box **Use rating scale in formulas** (found under the Answer type drop-down list) When this value is used in a formula:

- A result of 10-6 on the numeric scale is treated as a value of 1.
- A result of 5 is treated as 0.5
- Anything lower than 5 on the scale is treated as 0 for the formula.

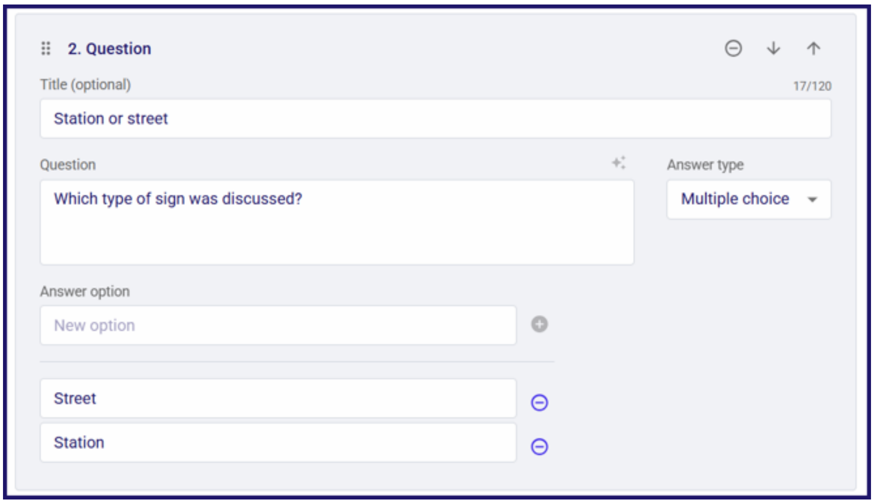


Multiple choice

The answer type Multiple choice allows you to specify a selection of possible answer options, and the answer you get will be drawn from that pool. If several options match for a call, AI Insights will list all matching answers.

When adding a question, to create it as multiple choice:

1. Type the **Question**.
2. Click the **Answer type** drop-down list and select **Multiple choice.**
3. In the **Answer option** type an appropriate value and click the **+** icon.
4. Repeat for each answer you want Insights to be able to offer.



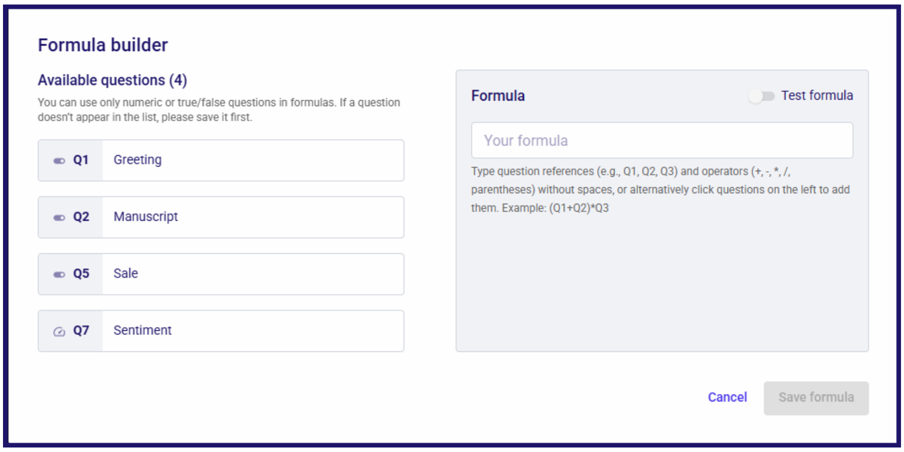
Try to consider all possible answers that you might need, including some to catch edge cases not otherwise covered. This ensures that there will always be a suitable answer for Insights to choose.

Creating a formula

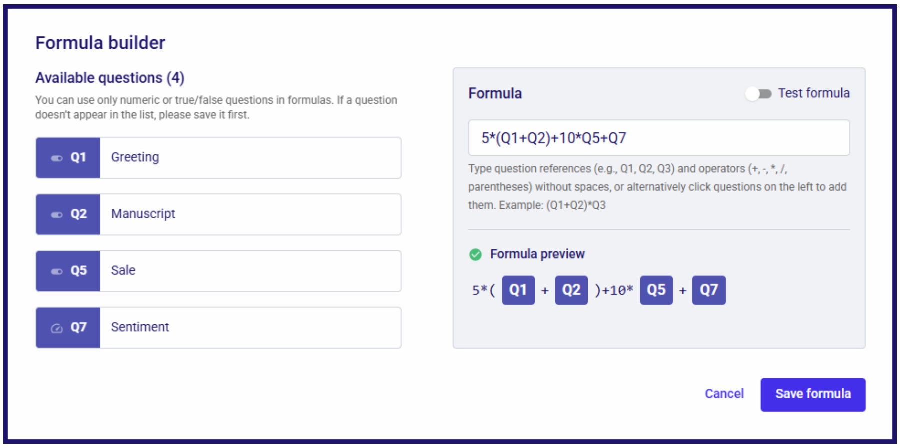
The **Answer type** called **Formula** lets you perform calculations based on the answers to other questions. It lets you create an overall score for a call, for example.

To create a formula:

1. Optionally, write a **Title** as normal.
2. Click the **Answer type** drop-down list and select **Formula**.
3. Click the **Add formula** link.



The list of **Available questions** contains all questions which have a numeric value or a Yes/No field, where a Yes answer is treated as 1 and No is treated as 0.



4. Type your formula. You can click a question in the **Available questions** list instead of typing e.g. Q2.

In this example, we have the formula: **5*(Q1 + Q2) + 10 * Q5 + Q7**.

- Q1 and Q2 are both Yes/No questions so have a value of 0 or 1. The formula adds those together and multiplies by 5. This gives the value:
  - 0 if both answers are No.
  - 5 if only one answer is Yes.
  - 10 if both answers are Yes.
- Q5 is another Yes/No, but is about making a sale, so we are weighting that answer as more important by multiplying by 10, giving a score of 0 or 10.
- Finally, we add the numeric value from Q7, a number from 1 to 10. This gives a maximum score of 30.

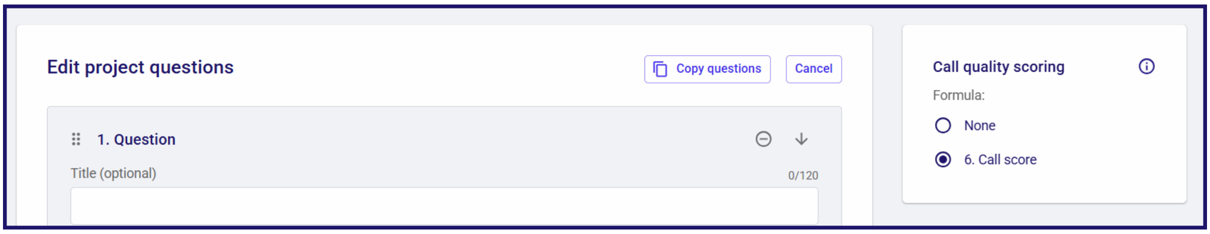
5. Click the **Save formula** button.

Call quality scoring

If your list of questions contains at least one formula, you can use it for **Call quality scoring**. It will be visible in the **Calls** page for each call that uses it.

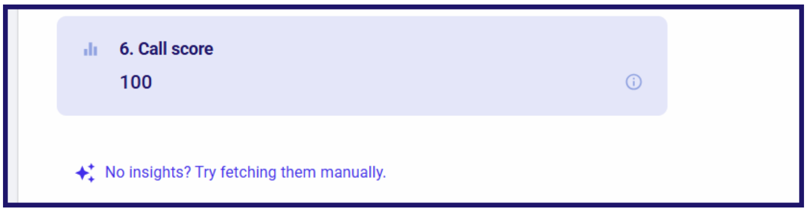
To use it, after you have at least one formula:

1. Click to select the formula question in the **Call quality scoring** box.



One important thing to note is that the call quality scoring is expressed and rated as though the value is a percentage.

- If the formula you created has a maximum result of 10, even the best call will only show as a rating of 10%.
- If you are planning to use that result for Call quality scoring, adjust the formula such that it can give a result from 0-100.
- If you modify an existing formula, you may need to refresh the insights before the update is reflected for existing calls. Click the **No insights? Try fetching them manually** link after saving the change.

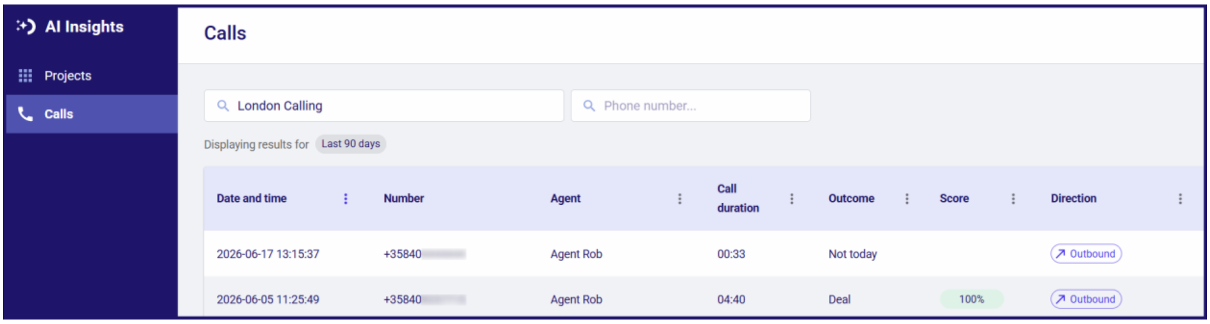


3 Gathering insights

Calls page

To view a list of calls:

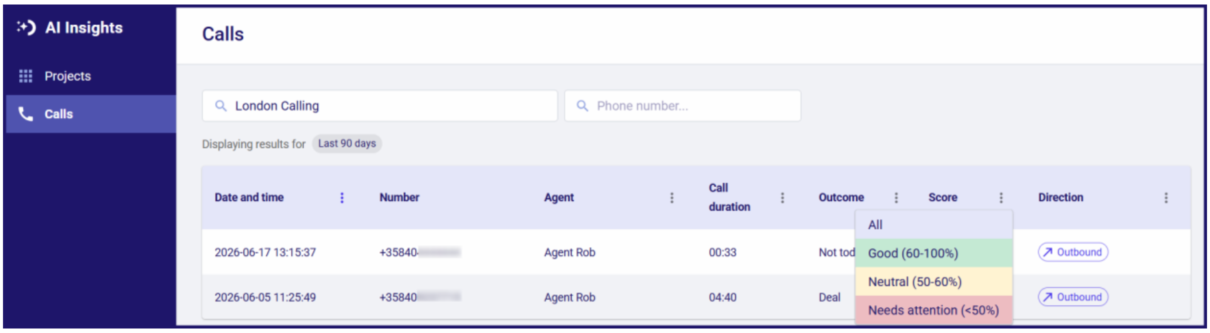
1. Click the **Calls** page from the left-hand menu.
2. Search for a project by typing its name in the **Search projects** field. Alternatively, click the drop-down list to select the project.
3. Optionally, type a **Phone number**.



Applying filters

You can filter the list of calls on most of the columns in the table. To do so:

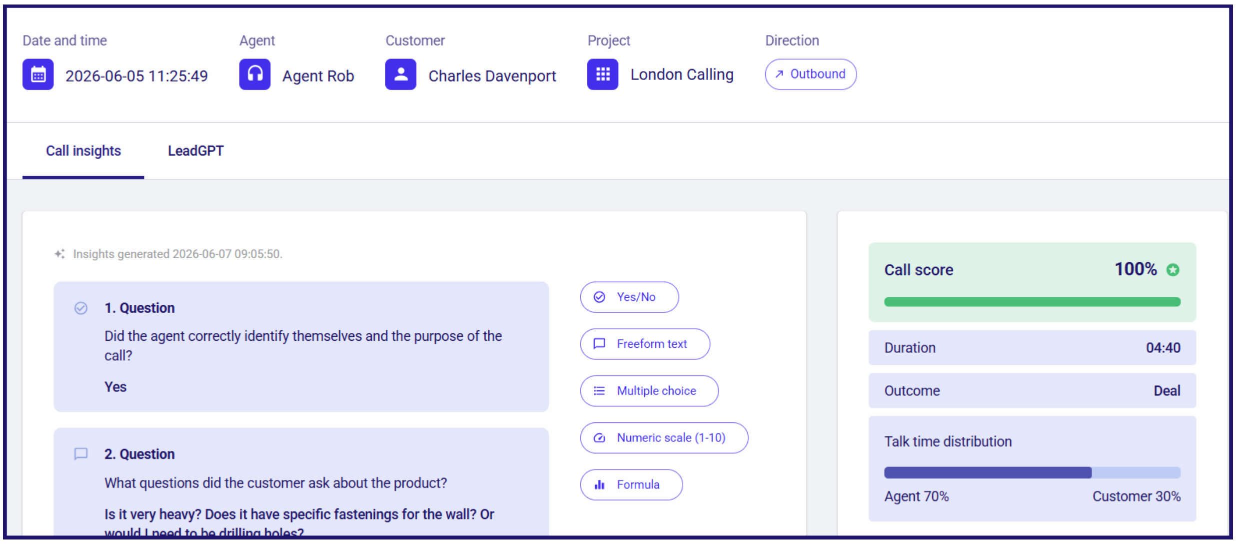
4. Click the three dots next to a column heading and select the filter to apply it. For example, to review calls whose agents may need additional coaching click to filter the **Score** column and select **Needs attention**.



Insights for a call

On the **Calls** page of AI Insights:

1. Click the call you wish to gather insights for.



At the top of the page, you will see some basic information about the call. Below that are the **Call Insights** and **LeadGPT** tabs.

Call Insights

In the **Call Insights** tab, you will see the list of questions relating to that call's project, as well as the AI generated answers.

- You can filter the list of questions and answers shown by clicking the buttons for the answer types you wish to see.
- Answers are based on the call recording and its transcript. If the call recording is not available, or only the agent's side of the call was recorded, AI Insights will not be able to generate all answers.
- The answers to the questions may not appear immediately if the call is recent. Click the link **No insights? Try fetching them manually** to prompt AI Insights to fetch the answers.

Additionally, on the right-hand column you can see other useful information:

- The **Call score** takes its value from the formula selected for Call quality scoring (if any).
- You will see the call **Duration** and **Outcome**.

- Additionally, you may see further information such as Talk time distribution, the **Call summary**, the **Agent's opening phrases** and the **Agent's closing phrases**.

LeadGPT

In the **LeadGPT** tab, you can ask additional ad hoc questions about the call.

1. Type your question or click to select one of the suggestions.
2. Click the **Ask question** button.

Call recording and transcript

At the bottom of the **Calls** page, you can access the call recording and call transcript.

- Click the play button to listen to the recording. Click through the timeline to skip through the recording.
- Click the three dots to change the playback speed.
- Click the  button in the bottom-right of the screen to view the transcript. Click the button again to hide the transcript.