

Turn Conversation Data Into A Competitive Advantage

Generic analytics only get you so far. Every business has unique questions that off-the-shelf metrics can't answer.

MiaRec Custom Insights is an add-on that lets you turn those unique questions into trackable, automated KPIs—designed specifically for your industry, your processes, and your strategy. From hospitality upsell opportunities to home care incident detection and niche compliance rules, MiaRec helps you unlock the value hidden in your conversations.

Arrival Date	Total Nights	Guest Personalization Card
2025-06-17	2	• Front Desk Summary: Ashley from TravelNow.com called on behalf of Bertulf Jensen to cancel a reservation approved by the hotel and TravelNow.com will email the reservations department to finalize the cancellation. • Guest & Party: Bertulf Jensen [0:15] • Arrival & Transport: Scheduled to arrive Friday, June 17th, departing Sunday, June 19th [0:58]. Booking reservation and has been approved by the hotel. [1:08] • Risks / Notes: The customer realized they input the wrong date for the reservation and wants to reschedule.
2025-07-12	3	• Front Desk Summary: First-time leisure guests, Robert Miller and his family (2 adults, 2 children ages 7 and 9) per room [0:38]. They booked two standard rooms with two queen beds each. They plan to arrive between 13:00 and 14:00. • Guest contact number: 2138402965 [1:04] • Occasion / Purpose: Leisure [1:39] • Guest & Party: Robert Miller; 2 adults, 2 children (ages 7 and 9) per room [0:38] • Special requests: Queen beds or upgrade to a suite if possible [0:38, 0:45] • Room & Location Prefs: Two queen beds [0:38] • Loyalty / Relationship: First-time guest; not a loyalty member. [1:26, 4:14] • Arrival & Transport: Arriving today, 2025-07-12, departing 2025-07-15. Estimated arrival between 13:00 and 14:00.
2025-07-12	2	• Front Desk Summary: Guest is Michael Jones, arriving late on Saturday, July 12th, with an ETA of 22:00 on 2025-07-12 [01:33] • Guest contact number: 775-382-1552 [02:22] • Guest & Party: Michael Jones [01:13] • Arrival & Transport: Late arrival with ETA 22:00 on 2025-07-12 [01:55]
2025-07-12	3	• Front Desk Summary: Guest Olivia Smith is arriving today, July 12th, and her girlfriend Ashley Bob need early check-in around 13:00. An upgrade has been requested. [0:07], [2:22], [2:32] • Confirmation number: BUPAIV [0:59] • Guest contact number: 413-836-9374 (Olivia Smith) [0:17]; 280-183-4000 (Ashley Bob) [1:46] • Guest & Party: Olivia Smith (primary guest); Ashley Bob (secondary guest/girlfriend) [0:07], [1:37] • Special requests: Upgrade request [2:09] • Arrival & Transport: Early check-in requested for Ashley Bob around 13:00 [2:22], [2:32] • Loyalty / Relationship: Booked through Travelocity [0:34]

THE CHALLENGE

Your contact center holds valuable customer insights crucial for closing deals, yet accessing them through a data analyst is challenging and costly. Key issues include:

- Standard analytics overlook specific business questions.
- Insights remain hidden in transcripts without proper extraction.
- Manual reviews and spreadsheets hinder timely decision-making.
- Generic tools fail to address niche or compliance needs.
- Coaching lacks precision without the right metrics.

Inability to access these insights results in lost revenue opportunities.

HOW MIAREC CUSTOM INSIGHTS HELPS

MiaRec Custom Insights sets out to change that. Turn your most important questions into dedicated AI tasks and automatically extract those insights.

- **Design custom AI tasks for your unique use cases.** As long as your buyers and customers are talking about it, you can report on it. For example, hyper-personalize guest experiences, identify and recover missed hotel bookings, surface patient neglect or care incident cases, pinpoint (in-) acceptable language in sales conversations, and much more.
- **Define exactly how outputs should look.** Choose the fields, formats, and labels you want in your dashboards, reports, or downstream systems. No more generic templates.
- **Automate recurring reports and alerts.** Schedule custom reports (e.g., daily incident summaries, weekly lost-booking analysis, monthly compliance exceptions) to arrive in your inbox at the cadence you choose.
- **Iterate with experts who've done it before.** Work directly with MiaRec's AI and onboarding specialists, who have implemented this across industries and know what works in real life.
- **Get a holistic view.** Layer custom metrics on top of Auto QA, CX Intelligence, or Revenue Intelligence for a single, holistic view of performance, risk, and opportunity.

The result: metrics that are as unique as your business—and impossible for competitors using generic tools to replicate easily.

HOW IT WORKS

MiaRec Custom Insights builds on the same AI infrastructure used for MiaRec Auto QA, CX Intelligence, and Revenue Intelligence, but it focuses on bespoke, high-impact use cases. Here is how it works:

Define the data points you would like to capture. During your onboarding, you will work with the MiaRec team to define the exact data points you require for your use case.

Create the custom AI tasks. Create custom AI tasks using natural language to generate fully customizable prompts, including examples and formatting instructions.

Turn custom metrics into business intelligence. Once the custom tasks are live, MiaRec automatically scans every call for these patterns and converts them into structured, reportable data points that can be added as structured fields to dashboards and reports, combined with existing CX, QA, or revenue metrics to uncover deeper insights, or filtered, segmented, and compared across teams, sites, and time periods.

Standardize & Scale. Because your custom insights are baked into MiaRec’s platform, you can standardize how you monitor risk, compliance, and incident types, continuously spot revenue and upsell opportunities that competitors can’t see, and build a reusable, extensible BI layer that grows with your business.

What starts as a single custom use case often becomes a portfolio of high-value metrics across CX, revenue, and compliance.

EXPECTED OUTCOMES

5–10 high-impact custom metrics live in the first 90 days.
Turn your most pressing questions into trackable KPIs—without building an internal AI team.

Up to 30% reduction in manual reporting and “spreadsheet” work.
Automate recurring, specialized reports and alerts so teams can focus on acting, not compiling.

Faster detection of risk and opportunity across your calls.
See critical incidents, emerging issues, and new revenue opportunities days or weeks earlier—creating a durable competitive advantage.

```
# TRANSCRIPT:
$(transcript)

# INSTRUCTIONS:

You are analyzing a call transcript between a sales representative and a potential buyer of collectibles.

Important compliance rule: Collectibles are not an investment. The sales rep must never describe or
the collectibles are not an investment.

Analyze the transcript and classify it into one of the following categories:

1. Compliant
- Rep never suggests or implies collectibles are an investment.
- If buyer asks about investment, rep clearly states collectibles are not an investment.

Acceptable references:
- Historical price changes (past, not future predictions).
- Competitor pricing, rarity, scarcity, or limited supply.
- Urgency language (without promising profit).

2. Non-Compliant
- Buyer suggests or asks if collectibles are an investment, and rep fails to correct or omit disclosure.
- Rep promises or implies future price increase or resale profit.
- Rep describes collectibles as part of an "investment" or "portfolio."
- Applies to new sales where buyer is deciding to purchase collectibles.

Provide a concise explanation of the choice, including quotes from the transcript with timestamps as evidence.

## Output Format
Return your answer as a JSON object:

{
  "value": "Compliant | Non-Compliant",
  "explanation": "Quote or summary from the transcript that supports this classification"
}
```

Investment Language Report

Report Period: Nov 5, 2024 - Nov 5, 2025
Report Timezone: America/Los_Angeles
Run by: Jonathan Escobedo (Nov 4, 2025, 3:27 PM)
Filters applied
More details

Total Inbound Calls

Total Outbound Calls

Total Internal Calls

Call Date/Time	User(s)	Investment Claim	Investment Claim Explanation
Oct 8, 2025, 9:50 AM	James Bond	Non-Compliant	The sales representative implies that the coins are an investment when they say 'beautiful addition to a collection but also as a tangible asset' (1:26). Additionally, the rep responds, 'Well, with historical items of this caliber, especially rare ones, this suggests that the coins are an investment, which is against compliance rules.'
Oct 8, 2025, 9:50 AM	James Bond	Non-Compliant	The buyer, David, inquires about the potential value of the coin in the future, 'value?' The sales representative, Sarah, responds by stating, 'While we can't guarantee performance... it will likely be worth much more in 10 years.' This implies that the coins are an investment, which is against compliance rules. The rep fails to clarify that the coins are not an investment.
Oct 8, 2025, 9:50 AM	James Bond	Non-Compliant	The sales representative implies that the coins are an investment when they say 'really smart move right now. It's a fantastic way to enhance your tangible assets' (1:17). The rep also states, 'It's a solid hedge against inflation and market volatility' (1:17), which suggests an investment interest in the coin as a collectible, but the rep does not clarify that the coins are not an investment and required disclaimer.
Oct 8, 2025, 9:50 AM	James Bond	Non-Compliant	The buyer, Mr. Miller, suggests that the coins might be a good place to put money away for the future? (1:41). The sales representative responds, 'The coins are not an investment, instead implying that they can be viewed as a collectible perspective. This fails to provide the required disclaimer that the coins are not an investment.'

