

CallRail

8 steps to build client trust and increase ROI for your Financial Services company



Get a handle on where leads are coming from:

Use [Call Tracking](#) and [Form Tracking](#) to understand precisely where your leads are coming from. Never ask “How did you hear about our business?” again. CallRail identifies your top-performing marketing tactics so you can double down on them going forward.

Optimize your Google Business Profile:

Ensure the information is correct, up-to-date, and as extensive as possible. Include recent photos and respond to reviews – show you care about your clients. Use a [call tracking number](#) to measure and manage incoming leads from your Business Profile.

Audit PPC campaigns:

Pay-Per-Click should not be a money pit. Constantly monitor, analyze, and optimize your campaigns. Pinpoint which keywords result in high-quality leads. Or, reverse engineer the process: use [Call Transcripts](#) to discover how your prospects speak and incorporate this language into your paid ads.

Create engaging landing pages:

You have about 8 seconds to grab a visitor’s attention when they visit your landing page. Learn what callers care about by analyzing your [Call Highlights Reports](#), identifying their pain points and learning how your business can help. Create clear, compelling landing page messaging based on these insights.

Invest in high-quality content:

Show prospects that your company knows what it's talking about. Create content, like social media posts, blogs, or guides, that delves into consumers' pain points, presents solutions, and showcases your team as the experts they are.

Embrace the power of social media:

Social media allows companies to engage with customers publicly, answer FAQs and build a reputation as a trusted expert. Try different channels to see which are most effective. Your prospects might prefer Facebook, Twitter, Quora, or Reddit — so test the waters before working out which channel is right for your firm.

Use insights from everyday conversations to identify hot leads:

[Conversation Intelligence](#) helps you tag and prioritize prospects. For example, if someone uses the phrase “schedule an appointment”, they are a hotter lead (and thus warrant more attention) than someone who mentions the term “comparing providers”.

Implement smart call handling to connect with more leads:

[Call Routing](#), a Call Tracking feature, instantly connects callers with the best-trained (and currently available) representatives — improving efficiency and providing a smooth customer experience.

Try Call Tracking for free to see how it can improve marketing ROI for your financial services company.

Try Call Tracking

