



CallRail

The marketer's guide to proving ROI on every call, text, and form

How to make the case for CallRail

Table of Contents

- 03** Introduction
- 04** Close the lead gap in your reporting
- 05** Build the case with numbers that leadership will respond to
- 06** See what's included in the full CallRail suite
- 07** Pick the right plan
- 08** You're ready to pitch CallRail to your boss



Introduction

You already know your campaigns are working. The problem is your reports can't prove it. When a significant portion of your highest-intent leads come in as phone calls, and those calls never get connected to the campaigns that drove them, the credit rarely goes where it's due — and neither does the budget.

This guide gives you the data, the framework, and the tools to walk into your next budget conversation with numbers leadership will actually respond to.



01

Close the lead gap in your reporting

Phone calls are among the highest-intent leads a business can receive. Someone searched, found you, and picked up the phone. That's a strong signal, and for most marketing tools, it's completely invisible.

Without Call Tracking in place, there's no way to connect those calls back to the campaigns, keywords, or channels that drove them.

This is the missing link between your marketing spend and your results. It makes your reports harder to defend, your budget harder to justify, and your wins harder to prove. And the cost of leaving it open is measurable:

200-400%

ROI in the first year for businesses that implement CallRail



60%

less time reviewing and analyzing calls

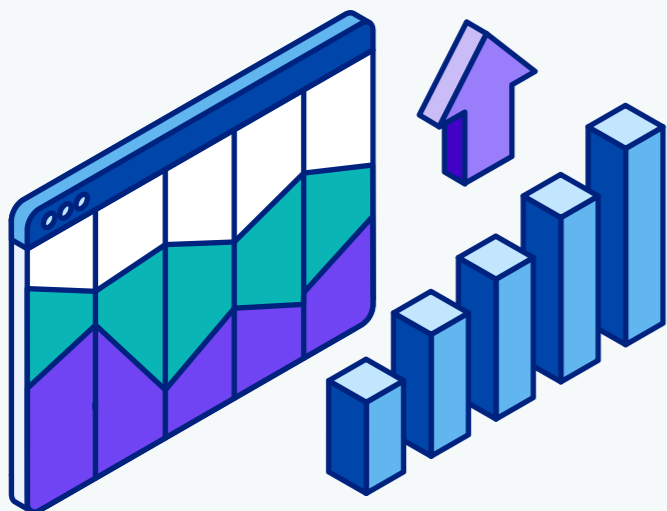
20%

reduction in cost per lead

*According to independent research conducted by Hobson & Company on behalf of CallRail

02

Build the case with numbers that leadership will respond to



When every call, text, and form fill is connected back to the source that drove it, your reporting tells a complete story. You can see which channels are bringing in leads, which campaigns are actually converting, and where your budget is producing results.

For your boss, complete data means budget decisions are grounded in real performance, not assumptions. It also gives leadership clear visibility into how quickly leads are being followed up on and how many are turning into customers.

For you

- See which campaigns, keywords, and channels are driving real leads and conversions
- Spend less time reviewing calls manually with automatic summaries
- Make faster, more confident decisions about where to put your budget
- Know that leads are being captured and followed up on, even outside business hours

For your boss

- Clear accountability on every dollar of ad spend, connected to real leads and customers
- Budget decisions based on complete, accurate data rather than partial reporting
- Confidence that high-intent leads aren't being missed or left waiting
- A platform that grows with the business without requiring additional headcount



"I like that CallRail tracks where our marketing dollars are being spent and the return rate for where we should invest more and what to invest in less."

— **Mary W**, Consumer Services Company

03

See what's included in the full CallRail suite

Leadership doesn't need another tool. They need clearer insight. CallRail is a [lead engagement platform](#) that helps businesses see where every lead came from, understand every conversation, and make sure no opportunity goes unanswered. The platform consists of four products that work together across the full lead journey — from first call to closed customer.

Call Tracking

See exactly which campaign, keyword, or channel drove every call and text.

- Every lead is automatically scored so your team knows which ones to prioritize
- Full conversation context on every interaction for smarter follow-up

Premium Conversation Intelligence™

Understand every conversation and act on every lead, without reviewing a single recording.

- AI-generated summaries and sentiment analysis surface what matters automatically
- Coaching notes, smart follow-up messages, and action plans after every call

Form Tracking

Get the full picture of every inbound lead, whether they called, texted, or filled out a form.

- Every form submission is linked back to the marketing source that drove it
- One complete view of all your leads, regardless of how they came in

Voice Assist

Answer, capture, and qualify every inbound call, 24/7.

- Handles calls after hours, during busy periods, and everywhere in between
- Every call is logged with a transcript, summary, and lead score for fast follow-up



CallRail makes it easy for our company to track calls, view ROI, and several other key metrics in one organized place."

— **Drew J**, Facilities Services Company

04

Pick the right plan

Every plan includes Call and Text tracking, AI-powered conversation insights, and the core tools your team needs to start connecting marketing spend to real results. Here's how to find the right fit.

Plan	Starting price	Best for teams who want to...
Lead Tracking	\$50/mo	Know which campaigns, keywords, and channels are driving calls and texts
Lead Tracking Complete	\$95/mo	See every call and form lead in one place, with multi-touch cost per lead reporting
Lead Conversion	\$150/mo	Get automatic call summaries, sentiment analysis, and coaching tools to convert more leads
Lead Conversion Complete	\$195/mo	Track and analyze the full customer journey with Call Tracking, Form Tracking, and Premium Conversation Intelligence
Voice Assist	\$95/mo (add on)	Never miss a call, 24/7, without adding staff

*Save up to 10% with a yearly plan. All prices shown are monthly billing rates plus additional usage.



In just six weeks, our answered calls increased by 118%. Voice Assist is helping us turn more calls into customers.”

— **Phil Green**, Founder, Rapid Repair Pro

05

You're ready to pitch CallRail to your boss

You've done the hard part. You understand the problem, you know what's missing, and you have the numbers to back it up. All that's left is starting the conversation with your boss. Here's an email you can send today.

Subject: Improving our lead tracking

To: [Your boss's name]

Hi [Name],

I've been exploring ways to improve our visibility into our marketing results. Currently, we can't see which campaigns or keywords are actually driving our phone leads.

I've started a free CallRail trial to fix this. CallRail attributes every call and text back to the specific source and automatically summarizes conversations, which should save the team a lot of manual entry.

Do you have 15 minutes on [Insert date/time] to walk through the demo with me and see if it's a fit?

Thanks,
[Your name]

You've built the case. Now start the conversation.

[Try CallRail free for 14 days](#)

No credit card required.