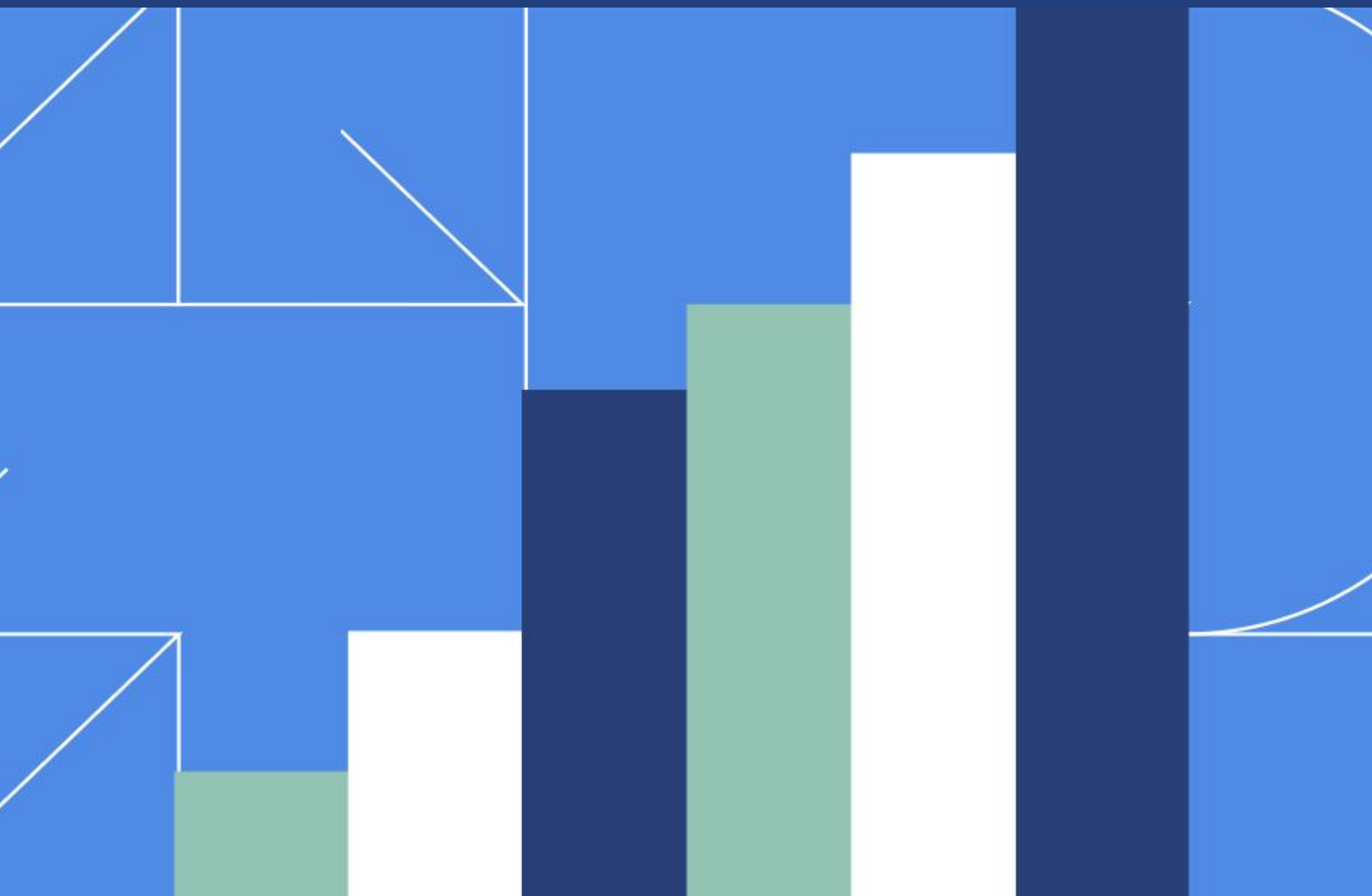# CallRail

Greater insight, greater results: How better data helped one agency boost client ROI

While it's fairly easy to find a marketing firm, it's not always easy to find a good one — one that can produce consistent, quality results within the right target audience. To set themselves apart from the masses, Einstein Industries knew they needed to do something different.

Based in San Diego, CA, Einstein specializes in search engine marketing and data-driven marketing strategies to support lead generation. They've been serving clients in the medical, dental, and legal industries for over 25 years.

Because services in those industries can be quite costly, customers often do extensive research before making an appointment or pulling out their credit cards. Appealing to them requires a mindful approach that considers their position in the customer's journey and speaks to their specific needs and questions.

It's why Einstein relies on CallRail tools like Call Tracking and Form Tracking together to get a 360-degree view of their client's customers, using multi-touch attribution data to create a checks and balances system that allows their clients to make data-informed decisions.

CallRail

Switching the focus from content to data

Before adding CallRail to their marketing tech stack, Einstein followed a "content is king" approach. While effective in drumming up business for their clients, their program wasn't as comprehensive as they would have liked.

"About six years ago, we decided to really focus on a more-encompassing SEM approach and started to build out our paid search and social side of the business," Kyle O'Brien, Einstein's Director of Customer Success, explains.

They bootstrapped the efforts for a while, relying on a team member who had some background with paid search and social advertising. But they quickly learned Einstein was ready for more advanced, call tracking and reporting for their clients.

Classification Criteria

○ Score all calls
◉ Score specific calls

Number	Call Type	Minimum Duration	Tag
All Numbers ⌄	All Calls ⌄	Any Duration ⌄	Sales ✕ or + Tag

Save

CallRail

That's when they turned to CallRail.

"We wanted to be able to see more data at a time when Google started hiding data. We decided to port all of our tracking numbers to CallRail, ditch the old vanity and 800/888 numbers strategy from the late 90s–early 2000s, and embrace this scary concept of dynamic number insertion versus hard-coded tracking numbers," says O'Brien.

CallRail helped Einstein implement Call Tracking and Form Tracking to give the agency and its clients a 360-degree customer view — through every step of the customer's buying journey.

Discovering benefits across multiple fronts

Quick and valuable insights

CallRail's Call Tracking platform with the Form Tracking power-up automatically analyzes customer inquiries to unlock trends and identify areas of opportunity. Einstein uses these insights to inform their strategic recommendations and then implement and track efforts to support them.

"Prior to any conversation with a client, we look at the leads and get a sample of the quality. That's a huge time-saver, right?" says Mike Hurley, Vice President. "When you're Zoom-call-to-Zoom-call, you've got two minutes to prep … it's a great way to quickly get up to speed. You can make some informed decisions and actually provide value."
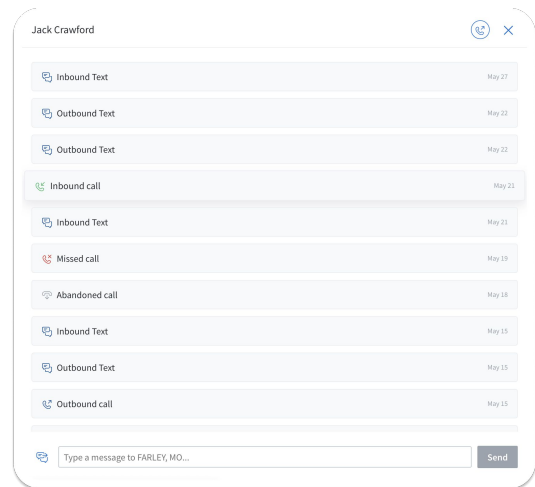
A precise view of the customer journey

Call Tracking and Form Tracking work together to create a seamless timeline of every lead's interaction — online and off. With this data on hand, agency marketers can better understand which marketing tactics are driving inquiries and bookings.

Being able to connect marketing sources to conversions — and understand the buyer's entire journey from start to finish — provides clients with valuable understanding of their customer base and proves the ROI of their marketing strategies.

CallRail

An easy sell

CallRail equips Einstein with the data they need to easily show their medical, dental, and legal clients how to effectively budget for marketing. It's no longer necessary to guess what they might need or to persuade them to reallocate budget to Einstein from competing marketing efforts.

O'Brien says, "Every discussion with a client that is data-informed is a client saved and an opportunity to maximize their ROI. Clients get pitched countless times a week by competition, and if you're not talking to them and providing meaningful insight and real business help, every client is already one foot out the door."

When clients express frustration that they're paying other firms huge sums for leads, Einstein can leverage CallRail's tracking and multi-touch attribution reporting capabilities to show exactly how many leads are being generated and what kind of quality they are. This arms clients with the knowledge they need to make data-driven decisions.

When a business makes its revenue by providing a high-end service, they want to make sure they're investing in solutions that drive high-quality leads and produce conversions.
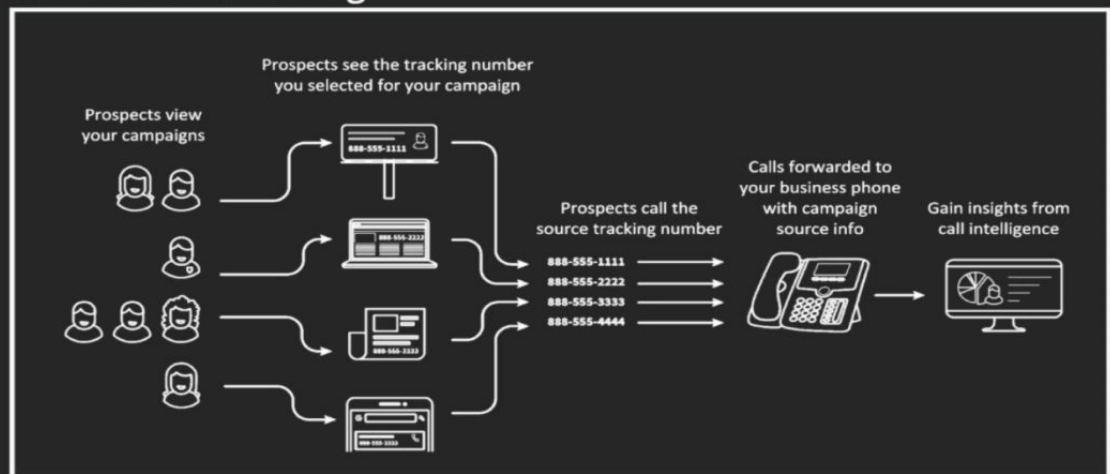

CallRail

Future-proofing clients' businesses

Einstein offers CallRail Call Tracking and Form Tracking as a feature of their core service to all clients because of the value it provides. Connecting data from multiple third-party sources produces the highest-quality leads and ROI, which, in turn, helps Einstein keep their clients consistently coming back for more.

"We consider the call reporting functionality to be a beneficial piece of what allows Einstein to create better relationships with our clients and, thus, assist in higher retention rates.

Including CallRail as a part of our entry-level service has allowed us to show clients areas of growth and opportunities — and track the success of those efforts," O'Brien says.

Source-Level Tracking

Prospects view your campaigns

Prospects see the tracking number you selected for your campaign

Prospects call the source tracking number

888-555-1111
888-555-2222
888-555-3333
888-555-4444

Calls forwarded to your business phone with campaign source info

Gain insights from call intelligence

CallRail

CallRail

Not only has Einstein been able to help clients optimize their ad spend and automate lead qualification, they've even been able to help one client divert $4,000 in wasted ad spend.

Since implementing CallRail several hundred clients ago, O'Brien sums it up best: "CallRail has helped us provide more ROI for every single SEM client. We have a rock-solid partnership with the rockstars of conversion tracking."

Bring that same level of data expertise to your client relationships today. Explore the benefits of becoming a CallRail agency partner.

Start Free Trial →