

LEVELS

Level 1

Unlock the story behind every lead



Level 2

AI helps you save time reviewing calls



Level 3

Accelerate time to insights and curb wasteful spending



Level 4

Embrace AI automation to improve efficiency



Level 5

Enhance the customer experience with AI



Level 6

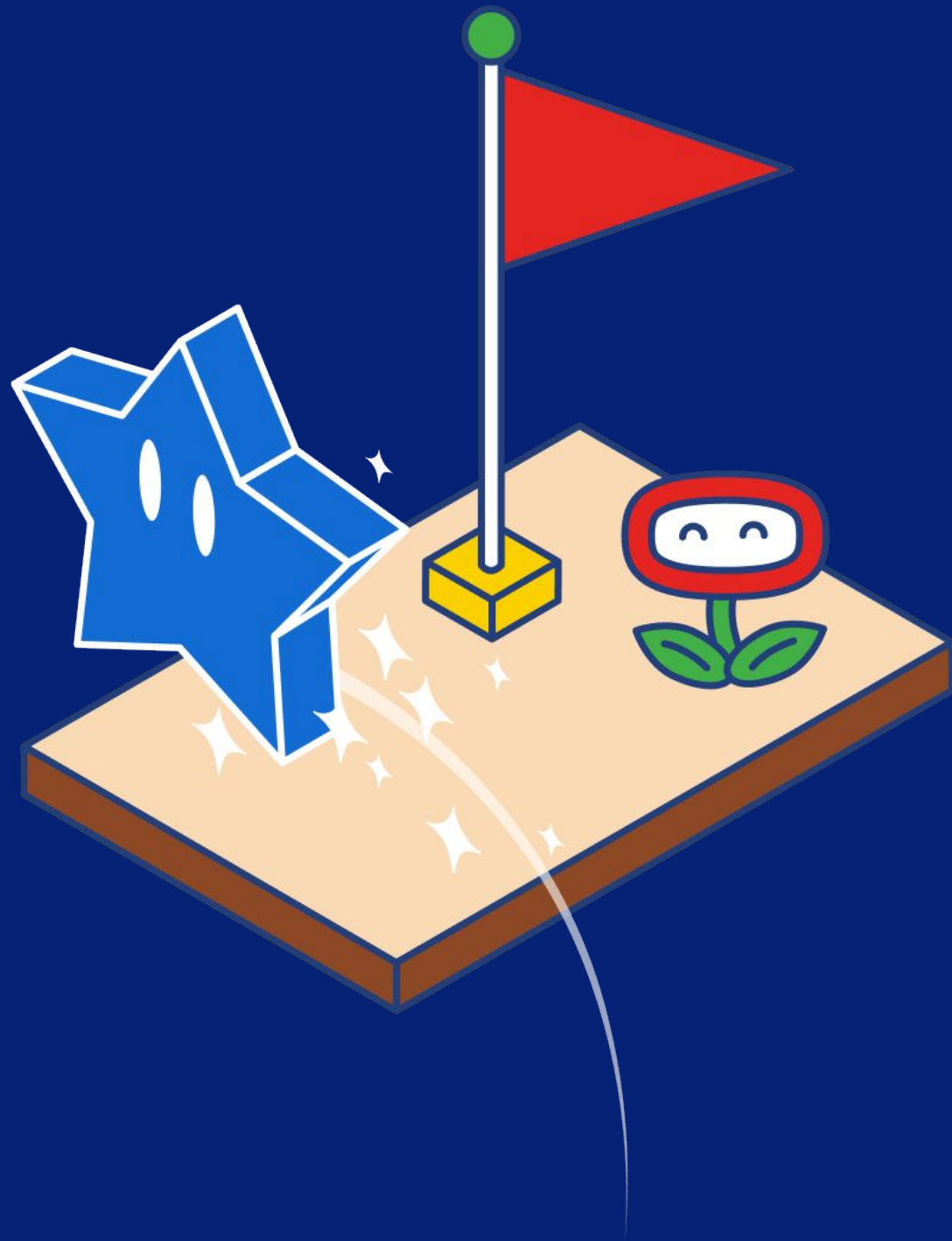
Elevate your value with AI



Level 7

Exceed expectations and boost client retention





Agencies are leveling up with AI

In a few short years, artificial intelligence (AI) has gone from an intriguing Side Quest to part of the Main Quest for marketing agencies. The potential of conversational and generative AI has seemingly transformed marketing from a 2-D side-scroller to a 3-D open world adventure. Sure, you could punt your way through the first few levels of the AI game, but it would be a waste of energy at a time when your clients expect better results, faster than ever.

Another path awaits you. Follow our official agency AI strategy guide to unlock a fully boosted, AI-powered agency that's ready to tackle every boss level in the game. Our walkthrough will show you how CallRail's AI-powered solutions will help your agency and your clients collect more coins, get the power boost you need to level up your efficiency and say Game Over to the competition.

We've done the work and put the quarter in the slot for you. Are you ready to press play and join the game?

CHOOSE YOUR PLAYER

Continue?

Yes

No

PLAYER 1

**SIXTH
CITY** MARKETING

STATS:

Cleveland, OH

PLAYER 2

 **LOGICAL
POSITION**

STATS:

Lake Oswego, OR

PLAYER 3

 **WIT
DIGITAL**

STATS:

Greenwood Village, CO

PLAYER 4

**Bullet Proof
Marketing
Inc.**

STATS:

CLASSIFIED

PLAYER 5


Brand Ranch Media
Cultivating Ideas / Building Brands

STATS:

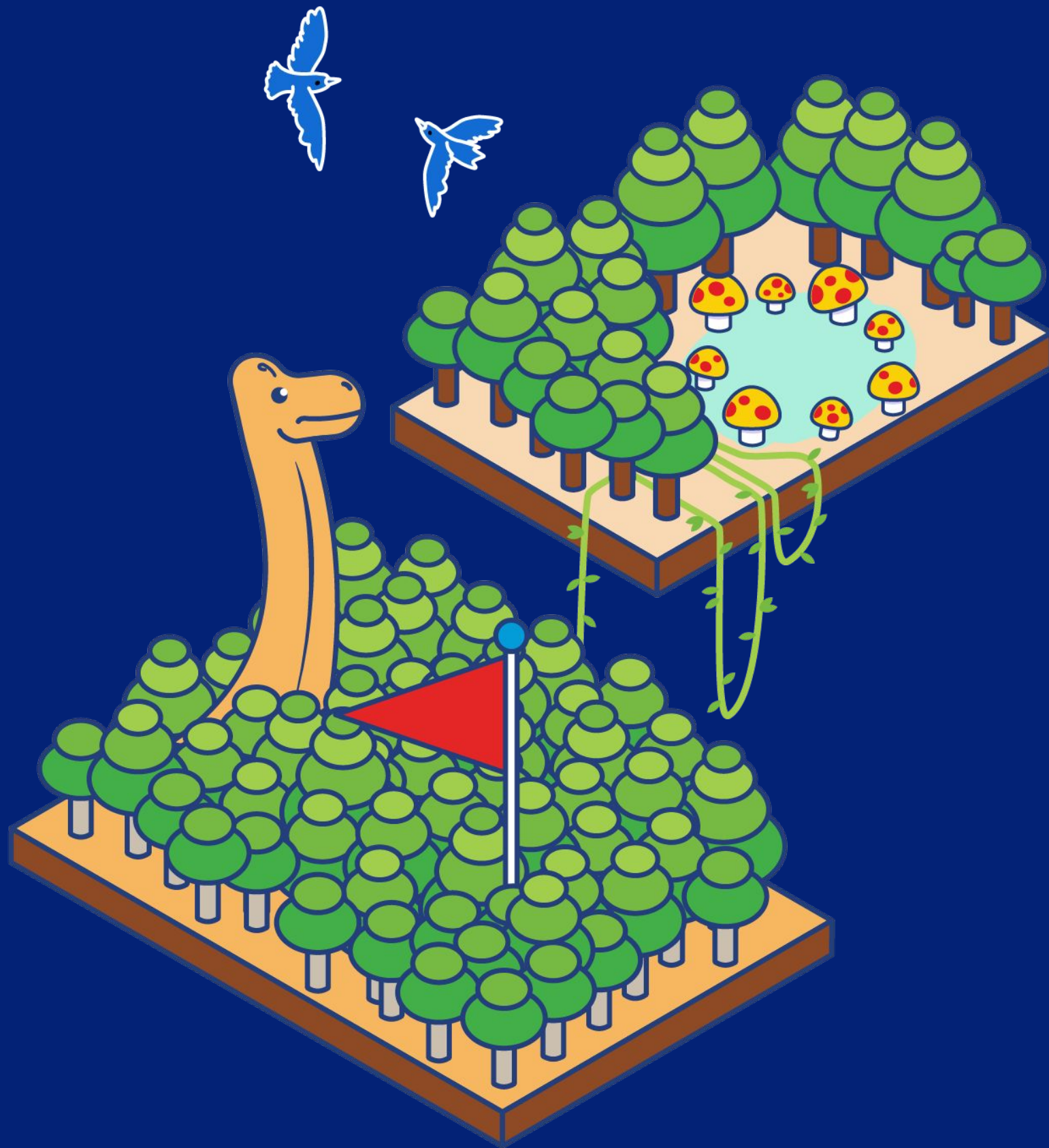
Tomball, TX

PLAYER 6


WEBISTRY

STATS:

Montreal, CANADA



Level 01

Unlock the story behind every lead

With Call Tracking, the days of wondering how digital marketing efforts are tied to high-value inbound calls are over. Most of your clients think they know why their phones are ringing, but Call Tracking gives you the data you need to help them understand the true effectiveness of each marketing channel or campaign. With Call Tracking, you can pinpoint which ads, campaigns, or search terms are behind each of your clients' calls.



Power Up

Helpful resources to master this level

- [How to get started with Call Tracking](#)
- [4 ways integrating Call Tracking with your CRM can help your agency retain more clients](#)

Main Quest

Track the source of every inbound lead

Unlocking better call attribution is the foundation for the levels to come in your AI marketing game plan. It is the critical step to tying together digital and offline customer interactions and providing a more complete view of a multi-channel customer journey.

Take Sixth City Marketing, a top-rated SEO and digital marketing agency in Cleveland, Ohio. They needed to level up their call tracking for a client with multiple locations. Using another vendor, Sixth City Marketing could not provide a comprehensive data story to its client. But, after switching to CallRail, Sixth City could handle 11 locations, 77 phone numbers, and an average of over 13,000 monthly calls during the busy season.

PLAYER 1

“Now, we're able to easily filter by location and source within CallRail [...] we have reliable cost-per-lead (CPL) data across every facet of the paid campaign. CallRail allows us to report these CPL figures with confidence to the client.”

Steve DiMatteo
Senior SEO Strategist,
Sixth City Marketing





Level 02

AI helps you save time reviewing calls

For time-strapped agencies and their clients, there's no bigger game-changer than an AI-powered call transcriber and analyzer like [Conversation Intelligence](#)[®]. The AI that powers Conversation Intelligence is trained on over 1.1M hours of voice data, providing transcripts with near-human-level accuracy.



Power Up

Helpful resources to master this level

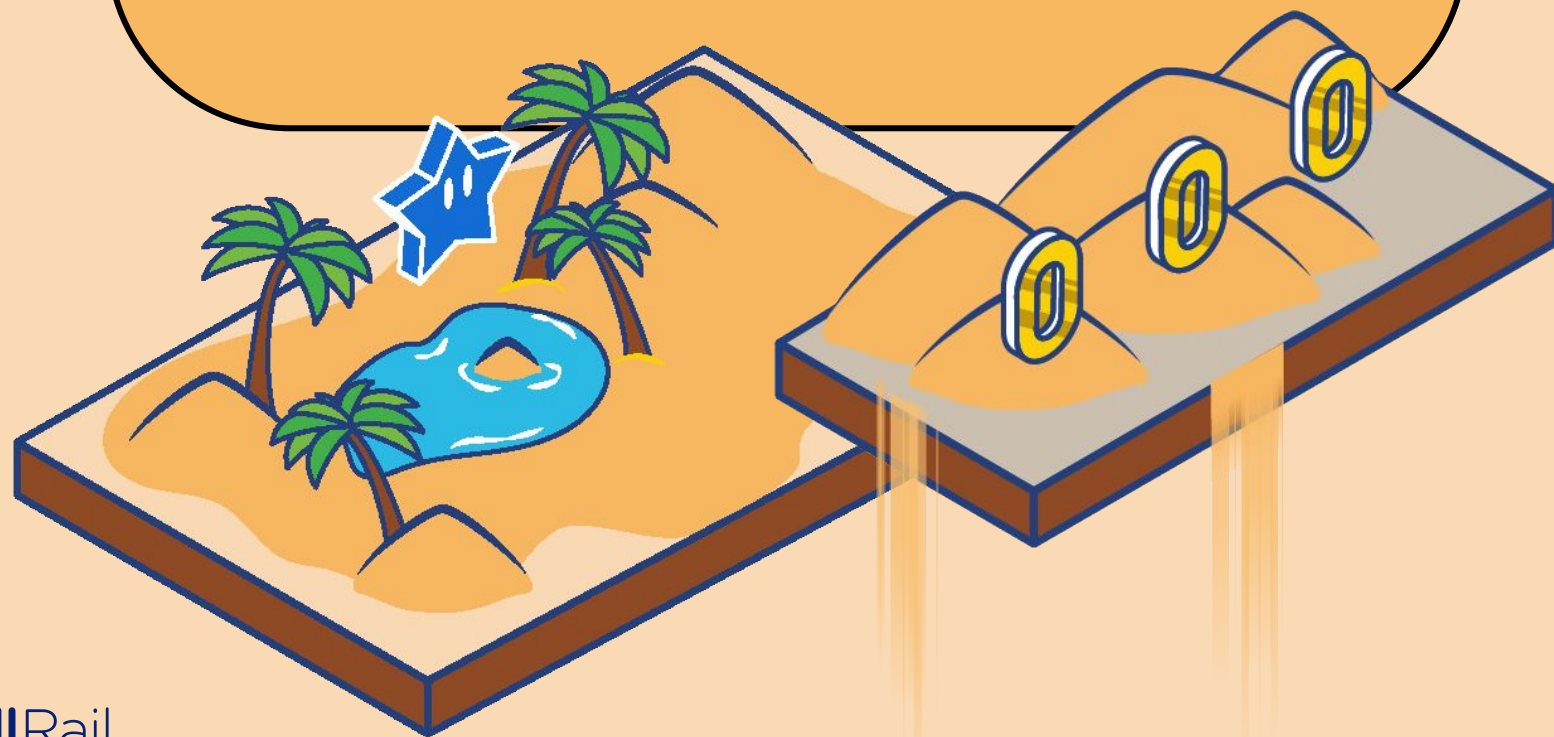
- [How to uncover valuable insights from phone calls](#)
- [The benefits of using Conversation Intelligence at your agency](#)

PLAYER 2

“Clients use the transcripts to identify which calls lead to a sale with the keyword tagging. They save at least 50% of the time by not having to listen to calls.”

Chris Pham

Assistant Team Lead,
Paid Media, Logical Position



Main Quest

Take back over 50% of the time spent listening to calls and deliver more value

Reviewing calls is an important part of understanding the customer experience and sales team performance. But there aren't enough hours in the week to listen to every call.

Logical Position, a digital marketing company specializing in PPC, tapped CallRail's Conversation Intelligence to provide clients with accurate, keyword-tagged transcripts that dramatically reduced time spent listening to calls.

With so much time back in their week, Logical Position was able to analyze necessary improvements with their clients. For instance, one dental client of Logical Position realized that they were getting many emergency calls on the weekends when they reviewed the "missed calls report." As a result, they hired an answering service to make appointments for these emergency calls, which increased revenue.

Level 03

Accelerate time to insights and curb wasteful spending

Your agency won't always know which creative campaigns will work, but even the failures provide data that tells you more about your client's audience and messaging. The real failure for agencies is not being able to quickly identify struggling campaigns.

Leveling up to real-time insights with CallRail can help you optimize your clients' marketing spend without being afraid to take risks. You'll be able to spot poorly performing campaigns faster than ever.



Power Up

Helpful resources to master this level

- [How to use AI to generate greater ROI for clients](#)
- [See how one agency saved \\$4,000 per month with Conversation Intelligence](#)

Main Quest

AI-powered Conversation Intelligence drives down lead costs and reduces wasteful spending

When it comes to fixing a problem with marketing spend, speed is king. For Wit Digital, a digital marketing agency specializing in home service businesses, switching to CallRail's Conversation Intelligence had a dual impact for clients.

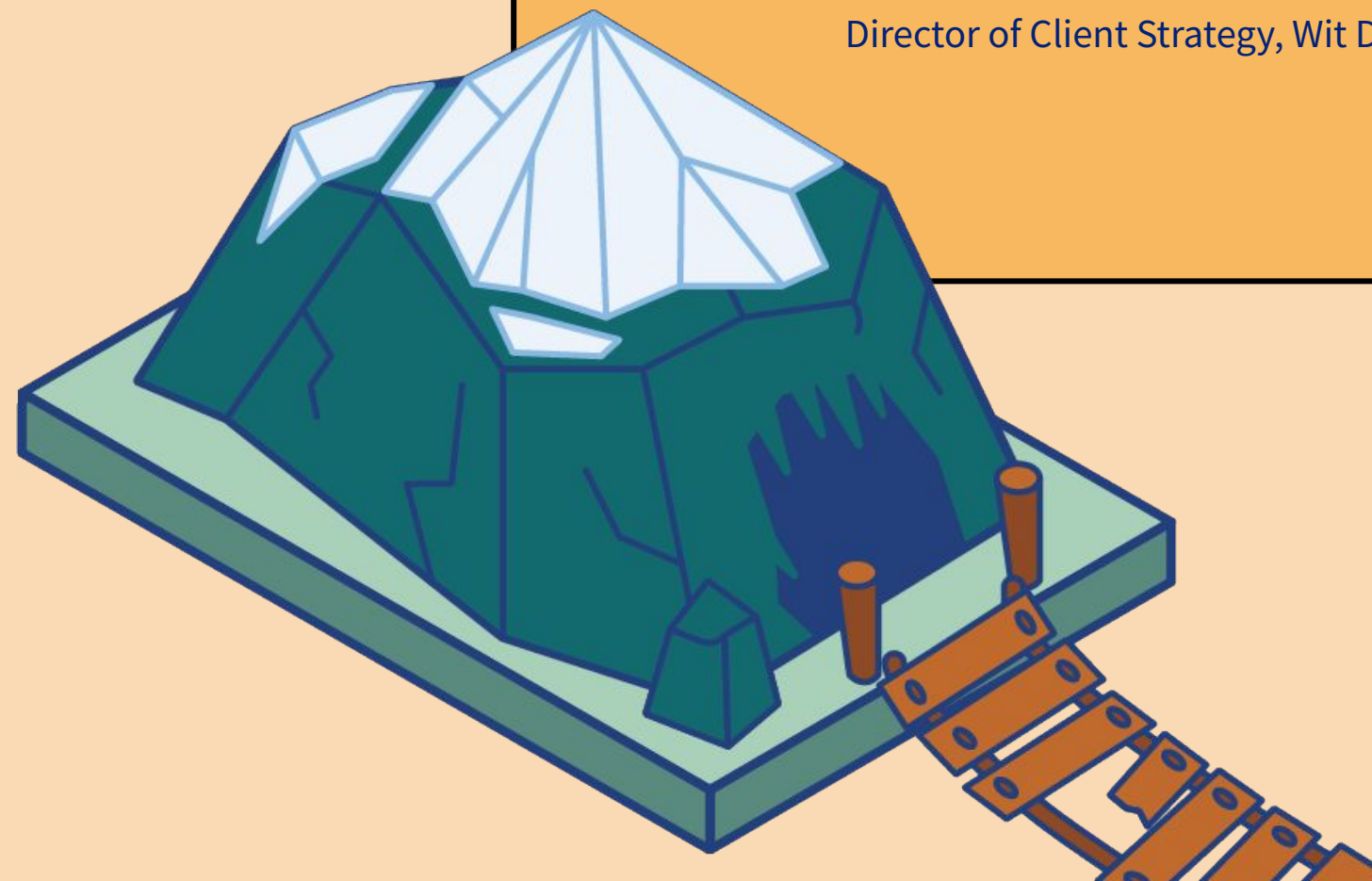
Previously, Wit Digital relied on an overseas vendor but could only classify calls with 65-75% accuracy. By switching to CallRail and adding Conversation Intelligence, Wit Digital took it to the next level. Now, they have instant insights into the critical keywords and phrases for each call, helping them identify trends faster, and drive down their own cost per lead by 64%.

PLAYER 3

“With Conversation Intelligence, I have new insights into what’s working in our campaigns and what’s not. Sometimes even a simple word change can make all the difference.”

Ryan Cook

Director of Client Strategy, Wit Digital





Level 04

Embrace AI automation to improve efficiency

The tedious, time-consuming—but high-value—tasks you once had to do can now be handled with automation rules powered by AI. Now, you can skip out on manual processes behind call scoring, call summarization, and other activities to spend more time implementing outputs and insights.



Power Up

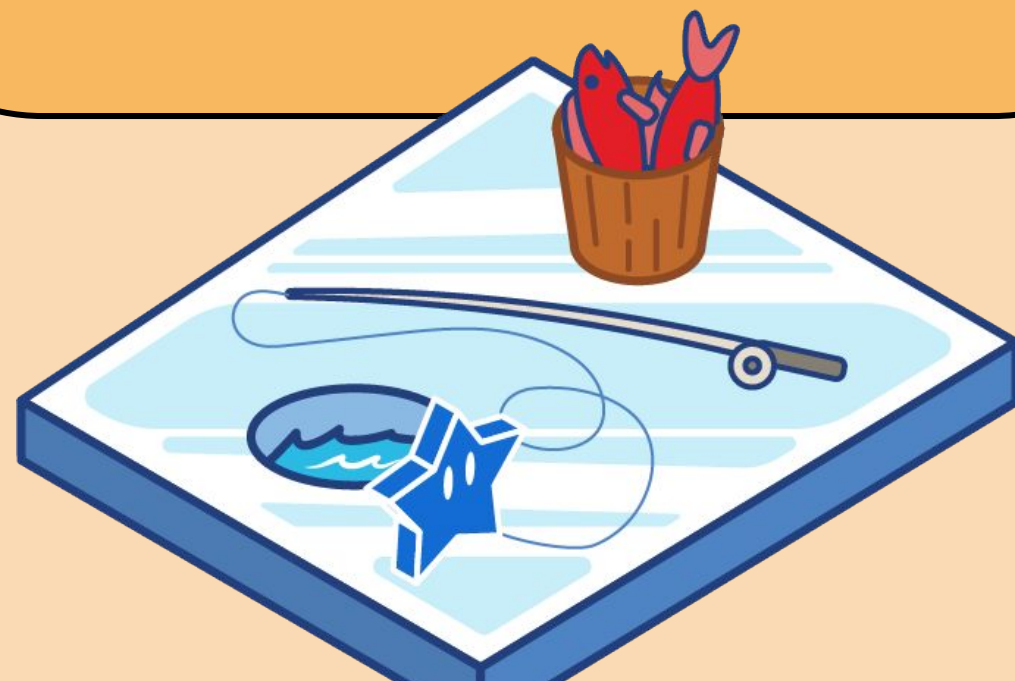
Helpful resources to master this level

- [7 automations every business can benefit from](#)
- [Three ideas worth stealing to solve client challenges creatively](#)

PLAYER 4

“As we are training new agents the transcripts helped us understand and skim through calls quicker — but the longer the calls, the longer the review time. With call summaries, it takes us 5-10 seconds to understand what was said during a 5- or even 60-minute phone call.”

Bruce,
Owner and Marketing Specialist,
Bullet Proof Marketing, Inc.



Main Quest

Qualify leads faster with automated call summaries

Conversation Intelligence gives your agency a rich set of automation rules to provide faster, more accurate lead qualification and call scoring.

The advances in AI’s ability to understand—and generate—language is transforming how agencies work. For many agencies, much of their days are spent listening to call recordings. With CallRail’s automated keyword spotting—which watches for certain specific keywords and phrases, identifies whether they were spoken, and then tags the call accordingly—agencies can know at a glance what every call is about at a high level without listening, saving hundreds of hours yearly.

For Bullet Proof Marketing, call summaries transformed the way they trained call agents. What was once the most time-consuming process for many agencies—transcribing, qualifying, summarizing, and analyzing calls—now takes seconds to complete.



Level 05

Enhance the customer experience with AI

The ability of today's AI to understand and use natural language can augment your agency's work in new and exciting ways. Take the next-gen leap with AI to deliver unexpected, impactful results your competition can't match.



Power Up

Helpful resources to master this level

- [How to build better frontline teams and campaigns with AI](#)
- [Customer sentiment analysis: How it works and why businesses need it](#)

Main Quest

Respond to issues in real-time with sentiment analysis

Integrating AI and machine learning into sentiment analysis tools allows you to monitor customer opinions and emotions as they occur and course correct in the moment.

When [Brand Ranch Media](#) uses Premium Conversation Intelligence to analyze its clients' calls, it doesn't stop there—it uses those insights to improve its audiences in Google Ads. With instant access to customer sentiment analysis, Brand Ranch Media knows exactly which calls are positive, negative, or neutral, alongside a summary of each call.

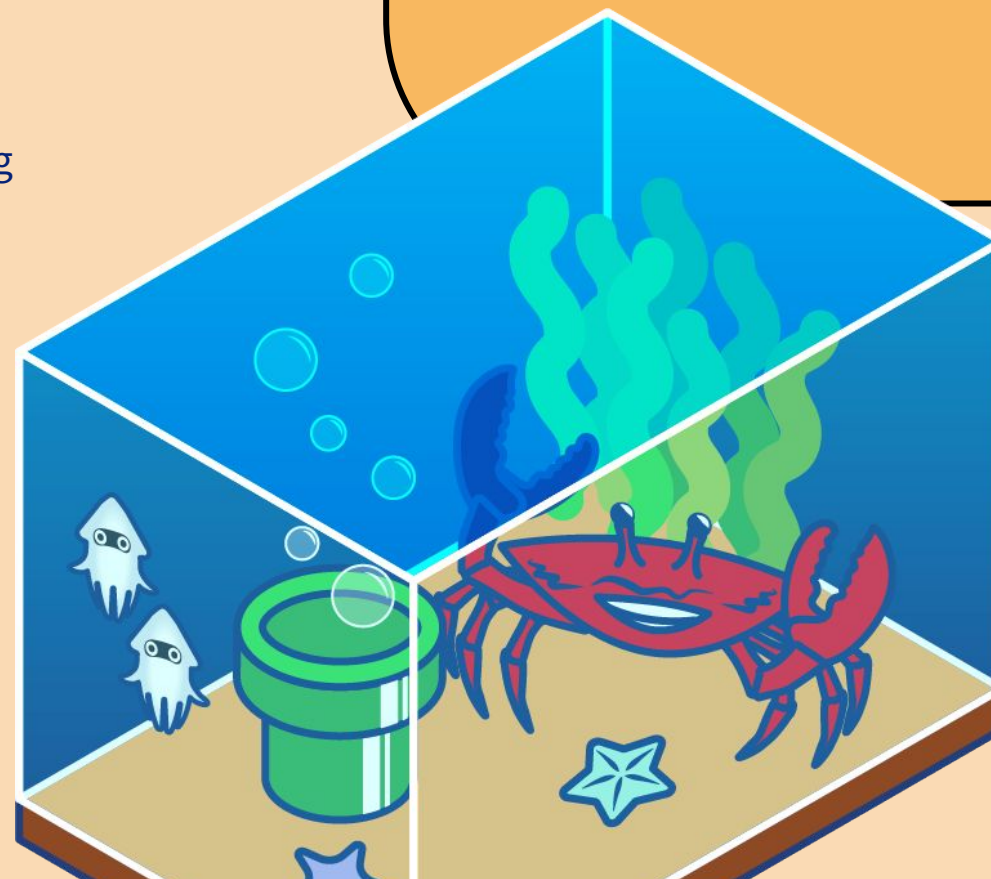
With such deep real-time insights into calls, they can provide on-the-spot coaching for clients' reps—and their own. Adding value for clients' frontline teams helps the agency stand out from the competition.

PLAYER 5

“It’s super-important to our clients. They use it to improve customer service without having to sit there and listen to calls. It gives them a better pulse on their business.”

Michael Palmer

Director of Digital Marketing and Strategic Growth,
Brand Ranch Media





Level 06

Elevate your value with AI

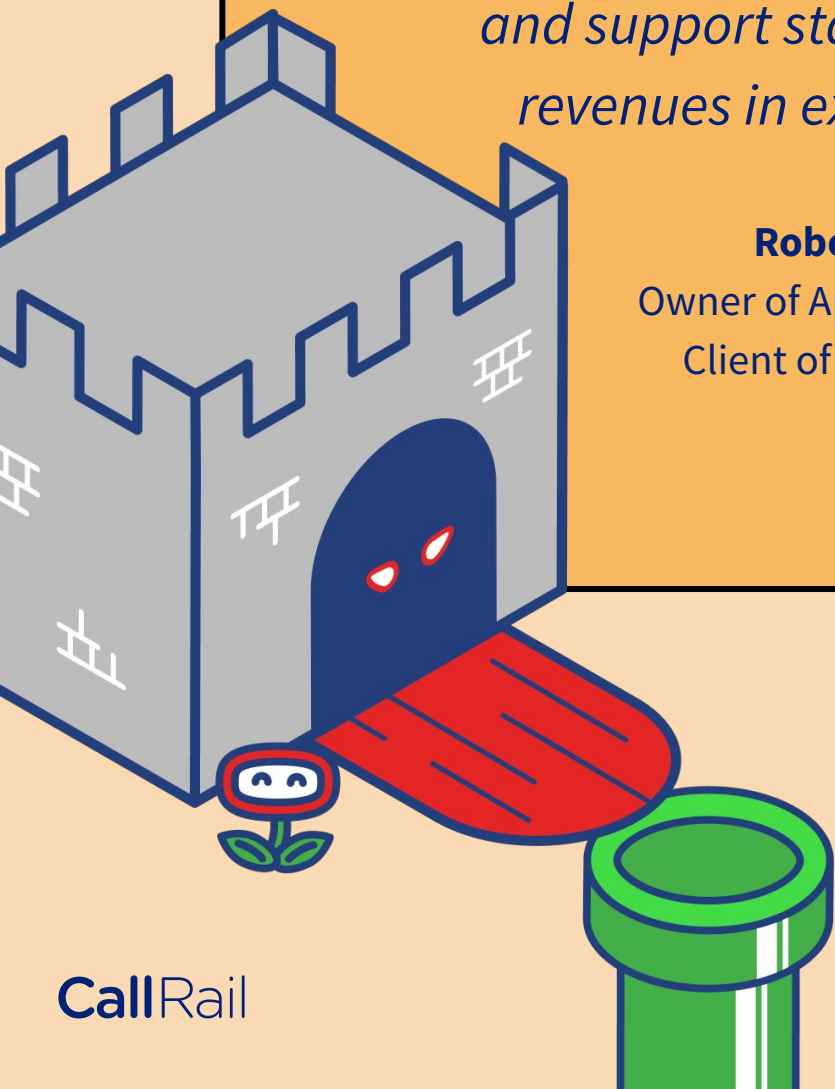
Any AI tools you invest in should be measured by their impact on your business's and clients' bottom lines. CallRail has leveraged AI and machine learning in our offerings, making it an integral part of our platform's core. It has a proven track record of driving growth and delivering tangible results for agencies and their clients.



Power Up

Helpful resources to master this level

- [How to prove ROI to clients](#)
- [Strengthen client relationships with more transparency into ROI](#)



“Since incorporating CallRail into our operations, our business has undergone a remarkable transformation. Originally a modest enterprise with annual revenues of \$50,000, we have now expanded to a team that includes several technicians and support staff, achieving annual revenues in excess of \$2 million.”

Robert Frumkin

Owner of Appliance Recovery,
Client of Logical Position

Main Quest

Tie the ROI of your services to your clients' bottom line

Thanks to CallRail, digital marketing company Logical Position can prove the ROI to clients with greater precision and transparency than ever. One clients, Appliance Recovery, pinpoints the introduction of CallRail through Logical Position as instrumental in their 40x revenue growth.

“CallRail has been instrumental in this growth, providing us with invaluable insights into our marketing strategies,” said Robert Frumkin, owner of Appliance Recovery. “It allows us to accurately track the performance of various marketing sources and campaigns, enabling us to optimize our efforts and make informed decisions about which strategies to enhance or discontinue. This has been a key factor in our accelerated growth and continued success.”

Whether it's increasing lead and conversion rates, or creating money-saving efficiencies, CallRail helps agencies deliver clear financial ROI.



Level 07

Exceed expectations and boost client retention

To elevate the client experience, strive to go above and beyond in delivering tailored, valuable insights that address your clients' specific needs. By offering transparent ROI data, you not only enhance your clients' experience with your agency, but also prove your agency's value and increase retention.



Power Up

Helpful resources to master this level

- [The agency marketer's guide to client retention](#)
- [Help prepare your clients for the future of AI](#)

Main Quest

Keep clients happy

CallRail makes it easier than ever to delight your clients and exceed their expectations. At a time when inflation is impacting everyone's budgets and bottom lines, becoming an invaluable part of the clients' business is key to keeping their business.

Webistry, a healthcare marketing agency, saw firsthand CallRail's impact on client retention. Once they included CallRail on every client account and campaign, they saw a remarkable 45% increase in client retention.

Recall that a mere 5% increase in retention rate can boost profits by 25-95%. Much of that comes from the fact that it is typically between 5 to 25 times more costly to find a new customer than to retain one.

PLAYER 6



"We've seen an increase of 23% in sales ever since we've started using CallRail with landing pages through Unbounce."

Jonathan Naccache
Co-Founder, Webistry



Beta Gameplay:

Explore the future of AI with CallRail Labs

At CallRail, the game is never truly over. New levels are constantly in development to help you deliver new value and insights to your clients. Agencies that use [Premium Conversation Intelligence](#) have access to [CallRail Labs](#), a community for like-minded innovators to experiment with cutting-edge AI from CallRail. Your feedback will help shape the future of CallRail and the way you work with and support clients.

The lab is always designing new and exciting levels, but here's a sample of some features you can access first as part of the community.



No more marketing blind spots

Remove any attribution assumptions and implement AI to tell the entire story of how your leads turn into lifetime customers.



Identify sales and bookings automatically

Analyze call transcripts using AI to find phrases, related terms, and even context clues indicating whether a sale was made on the call or not.



Hone in on your hottest leads

Our AI automatically detects critical context clues and marks your hottest leads as qualified so your team can focus on deals that are more likely to close.



Automate follow-up messages

Don't waste time crafting follow-up emails or texts when a customer is unsure. Our AI will do it for you automatically.



Build relationships with caller details

Automatically surface details about your callers that help you establish trust and build strong relationships.



Boost confidence and close rates with call coaching

AI-powered call coaching analyzes your team's calls in real-time and delivers timely, personalized feedback. For each call, it summarizes what reps get right and identifies areas for improvement.



Experience the power of CallRail and AI with a free-to-play trial

There's nothing like getting your hands on the latest and greatest games—or AI-powered tools—to see if it's your style before you commit to it.

Try CallRail free for 14 days, without a credit card. No speedruns necessary here.

[Start my free trial](#)