

The Blind Spot

How sales and service teams lose customers without lead intelligence

Customers expect fast response times and dislike repeating requests. Yet, due to communication misalignment, many small businesses struggle to meet these basic needs. Let’s look into a few reasons why misalignment occurs:



PROBLEM 1

They don’t know why leads or customers are calling

Employees often answer or return customer calls without any context or lead intelligence. This can create issues for both customers and employees.



60%

of small businesses do not have visibility into the marketing source that drove a prospect to reach out

91%

say they spend valuable call time talking about why a prospect is calling

If they already knew the marketing sources that drove leads to reach out,

81%

of sales and customer service representatives agree it would lead to more informed conversations

87%

agree it would allow them to provide better customer service.

Often, if a business wants to know more about a customer’s last call or appointment, employees have to either ask each other or ask the customer. This wastes time and isn’t usually a conversation the customer or prospect wants to have.

80%

of customer-facing employees admit they needed to ask a customer or prospect about who they talked to or what they talked about in a previous conversation

72%

say they have misspoken on a call to a customer or prospect because they did not have context from previous conversations

PROBLEM 2

They don’t share notes and conversation histories



PROBLEM 3

They use too many tools with no single source of truth



With so many channels and tools for communication, small businesses struggle to track customer interactions effectively. Some employees are overwhelmed by the number of tools.

94%

feel they have too many separate communications and/or contact management tools

89%

of small business employees feel that misalignment around customer communications is an issue at their company

SOLUTION

Get the only communications system tailor-built for small businesses.

CallRail’s Lead Center can save time, increase revenue, and decrease frustration for team members and customers.

Try it free for 14 days →

