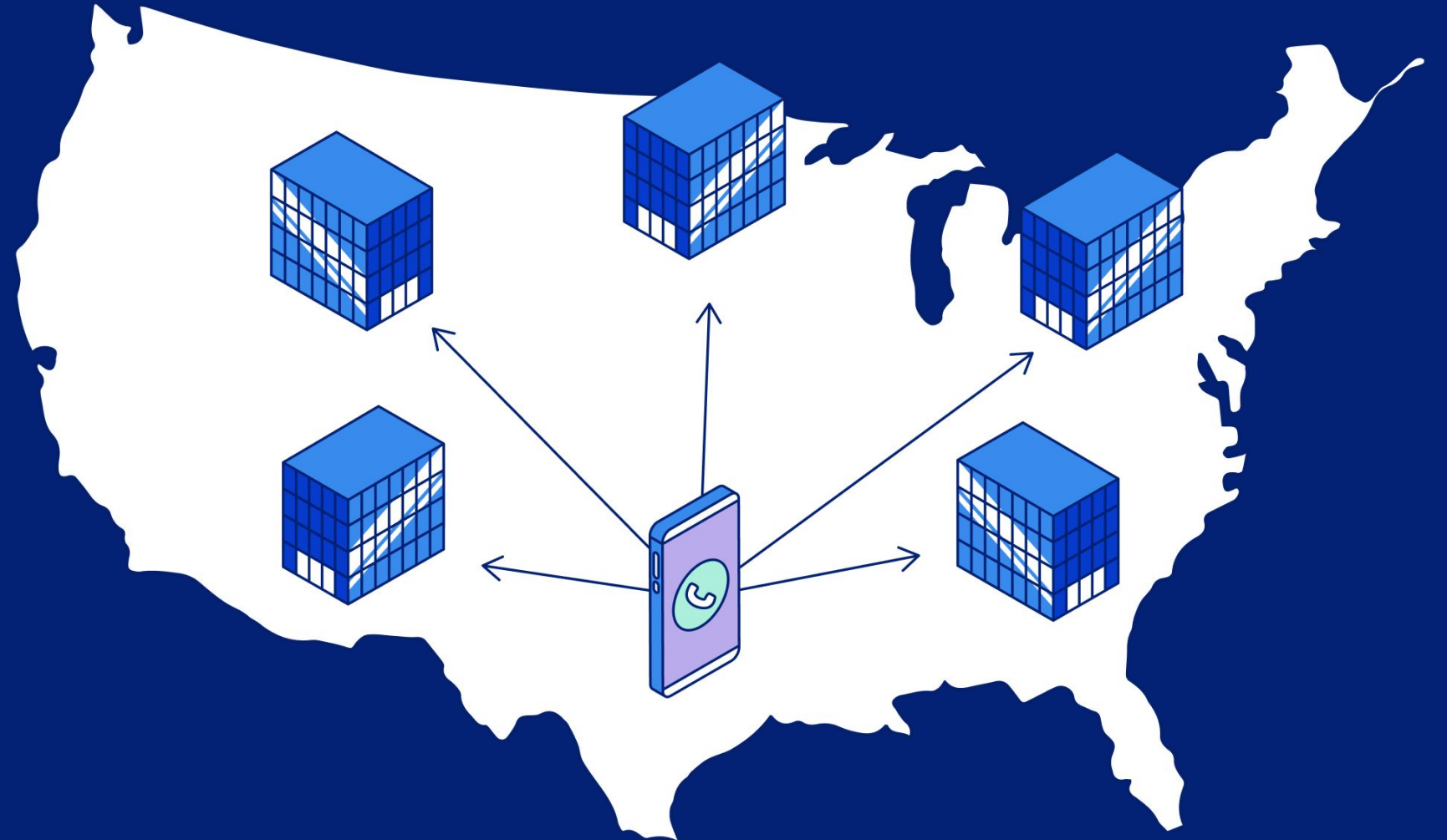


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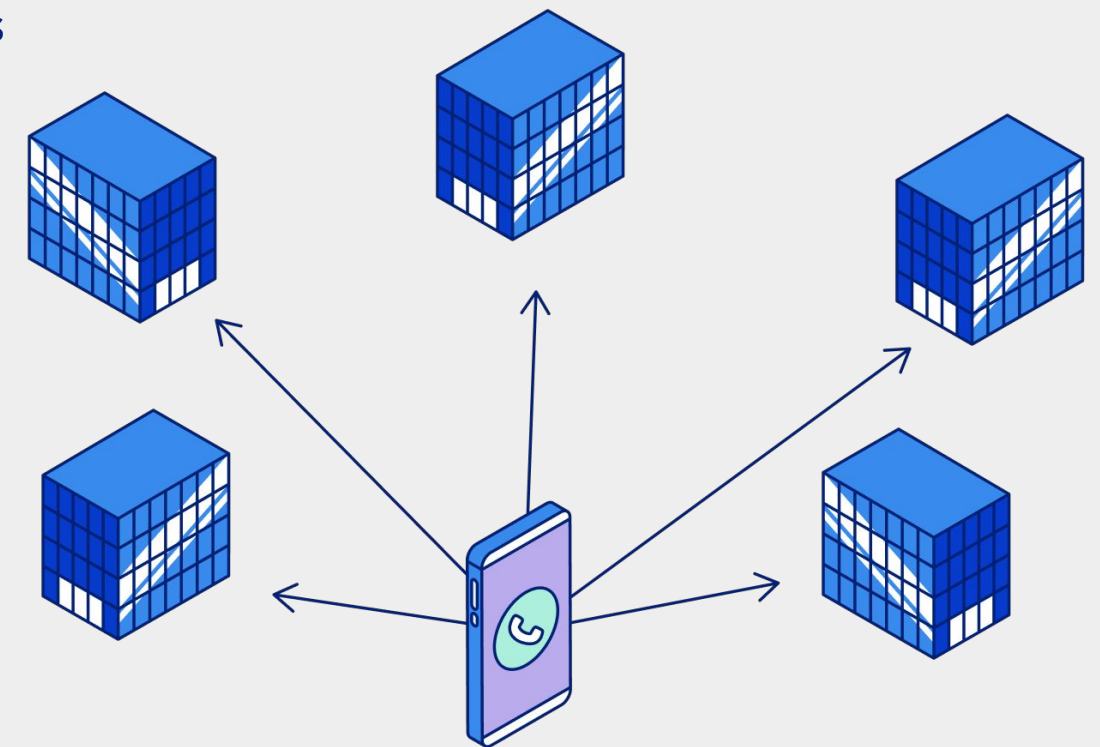
Ebook

# How a national call tracking strategy boosts critical KPIs



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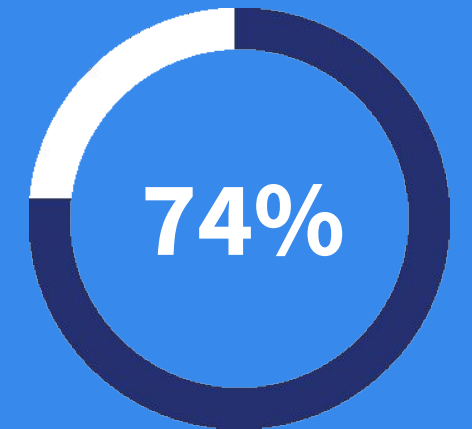
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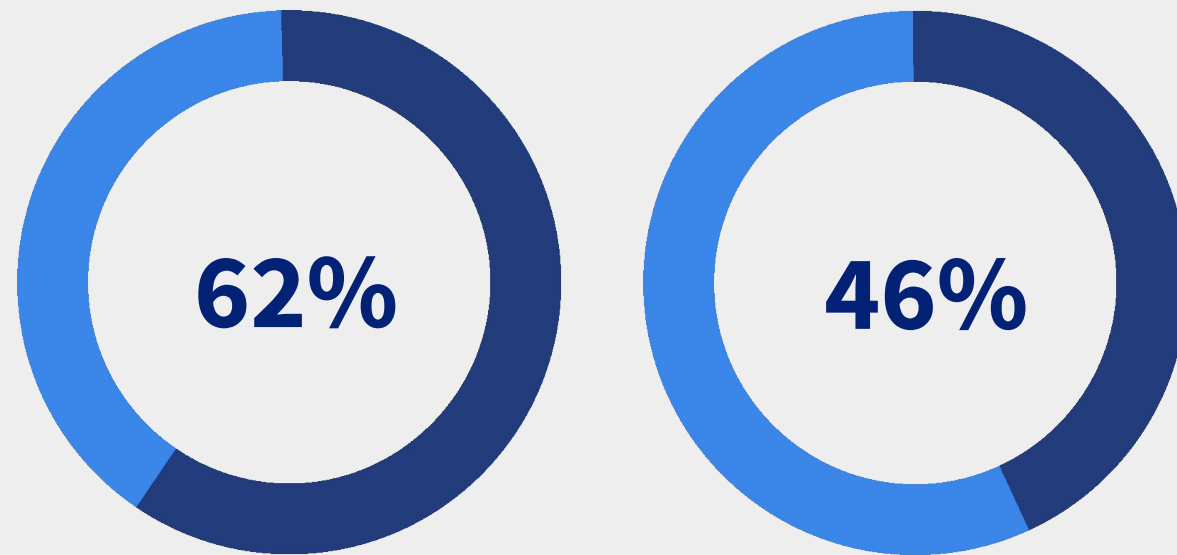
# Introduction

With a global economic downturn on the horizon, 74% of marketers say that they're adjusting their 2023 budget decisions accordingly. But instead of making cuts, many CMOs are re-evaluating the foundational marketing campaigns and activities to identify ways they can optimize conversion rates at each stage of the funnel and increase customer lifetime value (LTV).



However, many marketing leaders are in a pickle. On the one hand, they have more data than ever to help them understand every part of the customer journey. All this data can help prove the effectiveness of omnichannel marketing campaigns, thanks to multi-touch attribution modeling, which can show the performance of each channel. On the other hand, many CMOs struggle to make sense of all this data.

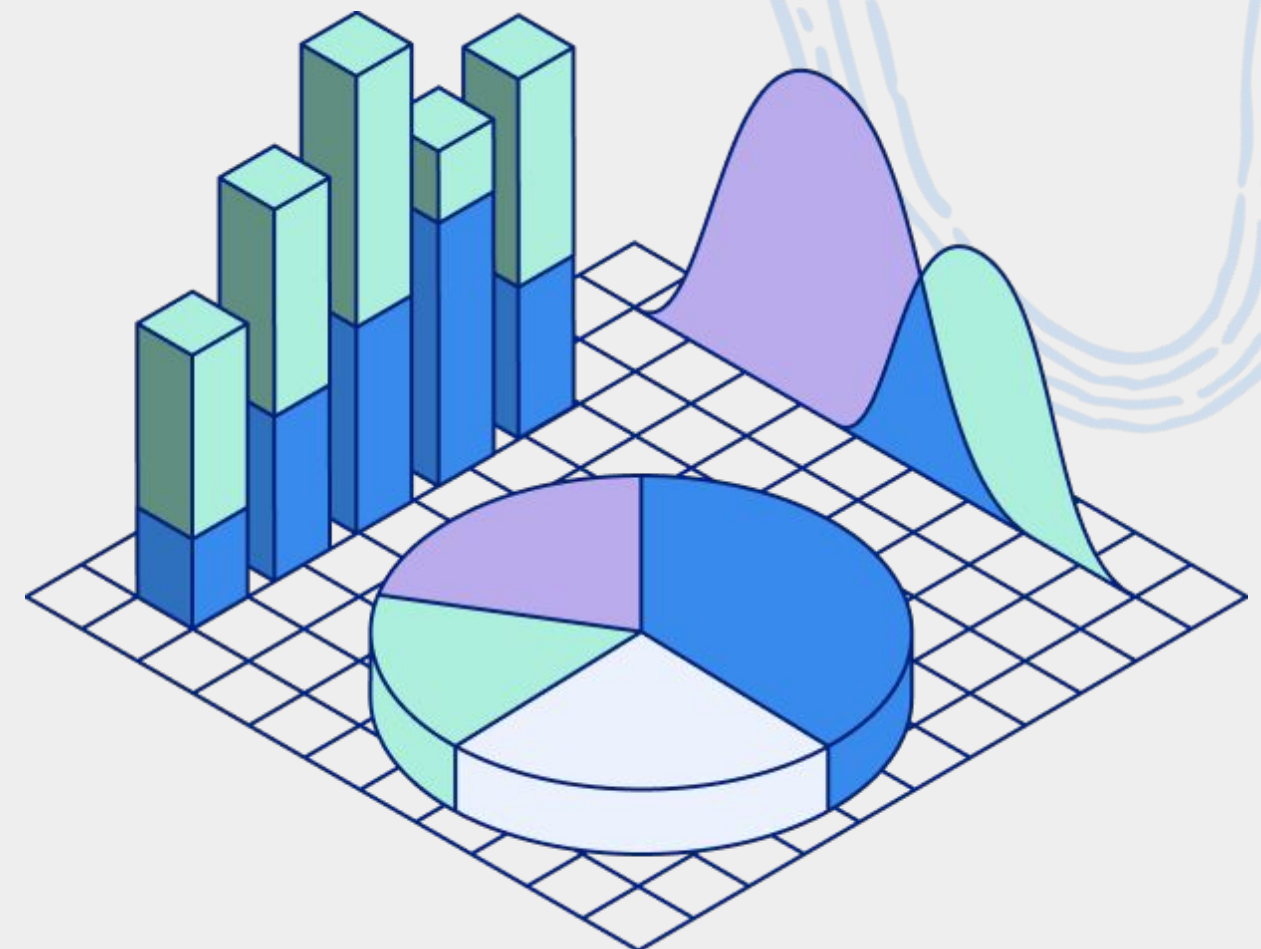
The problem is multiplied for national brands with local branches or regional groups. Drilling in on corporate-level data to find location-based insights, or rolling up granular local data to take action across the business can be challenging, particularly across disparate marketing applications and systems.



According to [CMO Council Research](#), “**62% of marketers are only moderately confident (or worse) in their data, analytics and insights systems**” and a whopping “**46% say access to relevant customer data is hit or miss or worse.**” It’s hard to make good decisions with bad data.

To overcome this challenge, marketing leaders need to increase the certainty they have in their data—especially their omnichannel attribution—in order to optimize conversion rates and increase customer LTV efficiently.

In this ebook, we’ll take a look at how a national call tracking strategy can help CMOs make sense of their omnichannel campaigns, and ultimately make better decisions to improve key metrics like conversion rates and customer LTV. We’ll also discuss how a unified call tracking solution for local and corporate marketing offices can reduce the cost and complexities of a national call tracking strategy.





## Chapter 1

# Untangling the threads of omnichannel marketing to improve conversions

While an omnichannel marketing strategy may sound complicated, it's important for any business to communicate consistently with customers across all channels. Creating an integrated customer experience in person, on the phone, over email, via live chat, sending direct mail, using text or instant messaging platforms, on video conferencing tools, through form submissions, and on social media will help set your business apart.



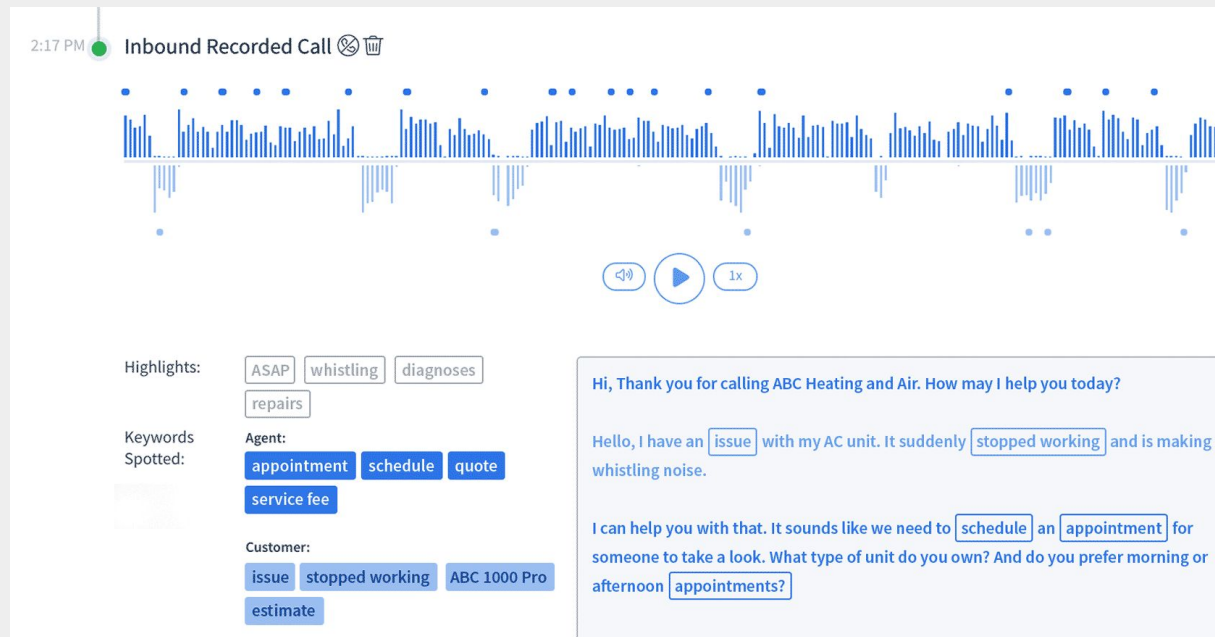
Your business may not operate in every one of these channels, but you can bet your customers are going to use them all. The average B2B buyer, for example, uses ten or more different channels before making a purchase, according to McKinsey. Even B2C companies benefit from omnichannel. According to McKinsey, omnichannel customers shop 1.7 more times and spend more money.

Calls are one of the most important touchpoints in omnichannel marketing for local businesses. 64% of local businesses say calls are their best leads. And calls consistently convert at higher rates than online, up to 12x more.

That's why every CMO needs to be able to track each and every channel to see how they influence the buying journey. This information can help you determine where to spend less, where to spend more, and when you need to switch up your omnichannel marketing strategy altogether.

*Without call tracking helping determine what channels led to each call, however, online and offline multi-touch attribution is pretty much impossible.*





As a result, many CMOs make decisions without fully grasping the impact of their offline channels (phone, in-person events, traditional advertisements like billboards, etc.). For example, a billboard advertisement may be generating phone calls and leads, but without call tracking, those leads may be missed or misattributed to another channel, causing marketing leaders to unintentionally pull back on an effective advertising channel.

**With a call tracking solution like CallRail, you can easily shine a light on the dark areas of your attribution modeling and achieve true multi-channel attribution. Here's a look at how it works:**

- 1 Using CallRail's [Call Tracking](#), which tracks calls from online and offline channels, and [Form Tracking](#), which helps determine how leads are connecting with your business via form submissions, you can track critical online and offline conversion points in your buyer's journey, like which TV ad led to a call or which paid search ad led to a form submission.
- 2 Your online and offline conversions are united in one place, helping you see the entire buyer journey and the performance of each channel more clearly.
- 3 Pair these insights with [Conversation Intelligence](#), which automatically transcribes all of your inbound and outbound calls and then uses AI to analyze them. This allows you to uncover the hidden patterns in customer conversations and behavior that can help you increase conversions.
- 4 You can then use these insights to replicate successes and to address channels that aren't performing.
- 5 Over time, you will understand your customers needs and behaviors better, giving you the intelligence needed to increase customer LTV.

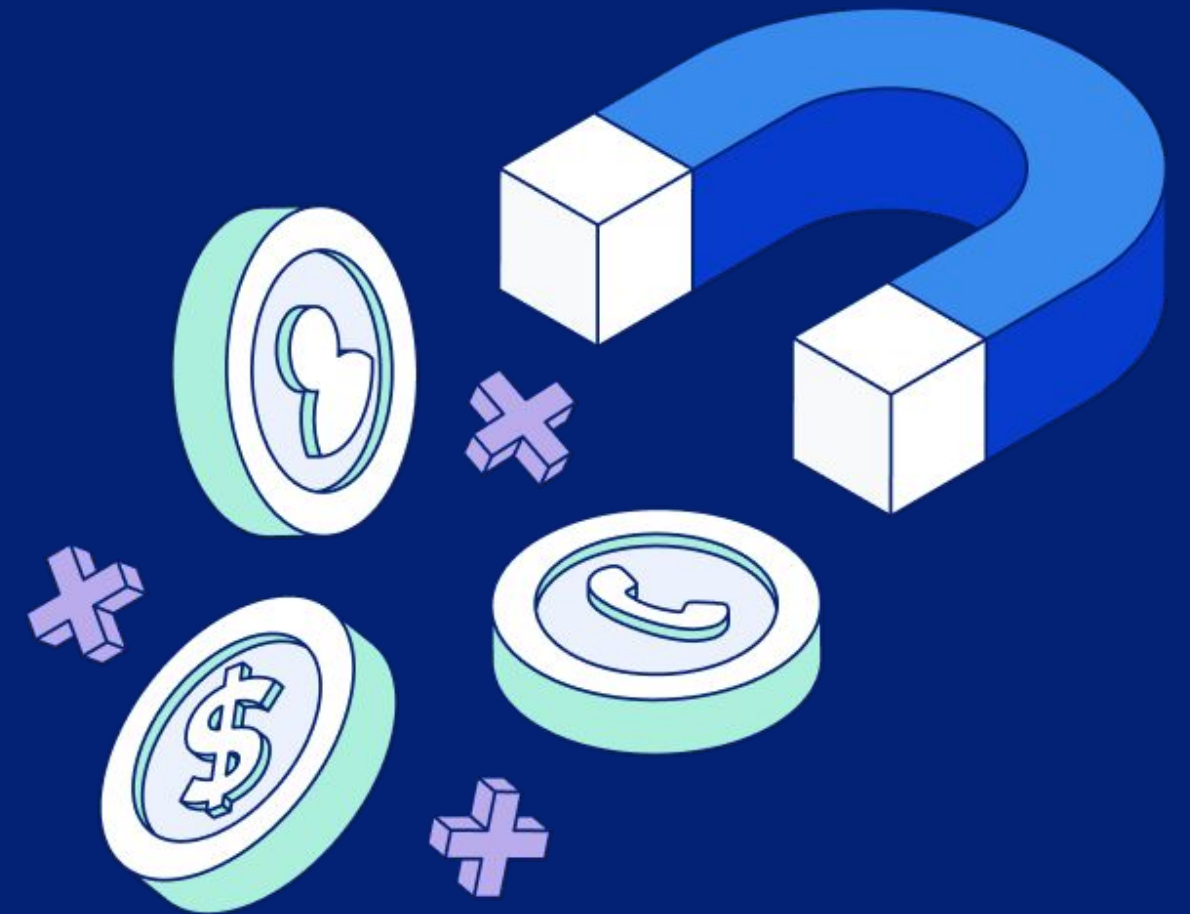
If your marketing team's offline and online conversion data exist in silos, you'll never have access to the level of omnichannel intelligence needed to optimize your key KPIs.



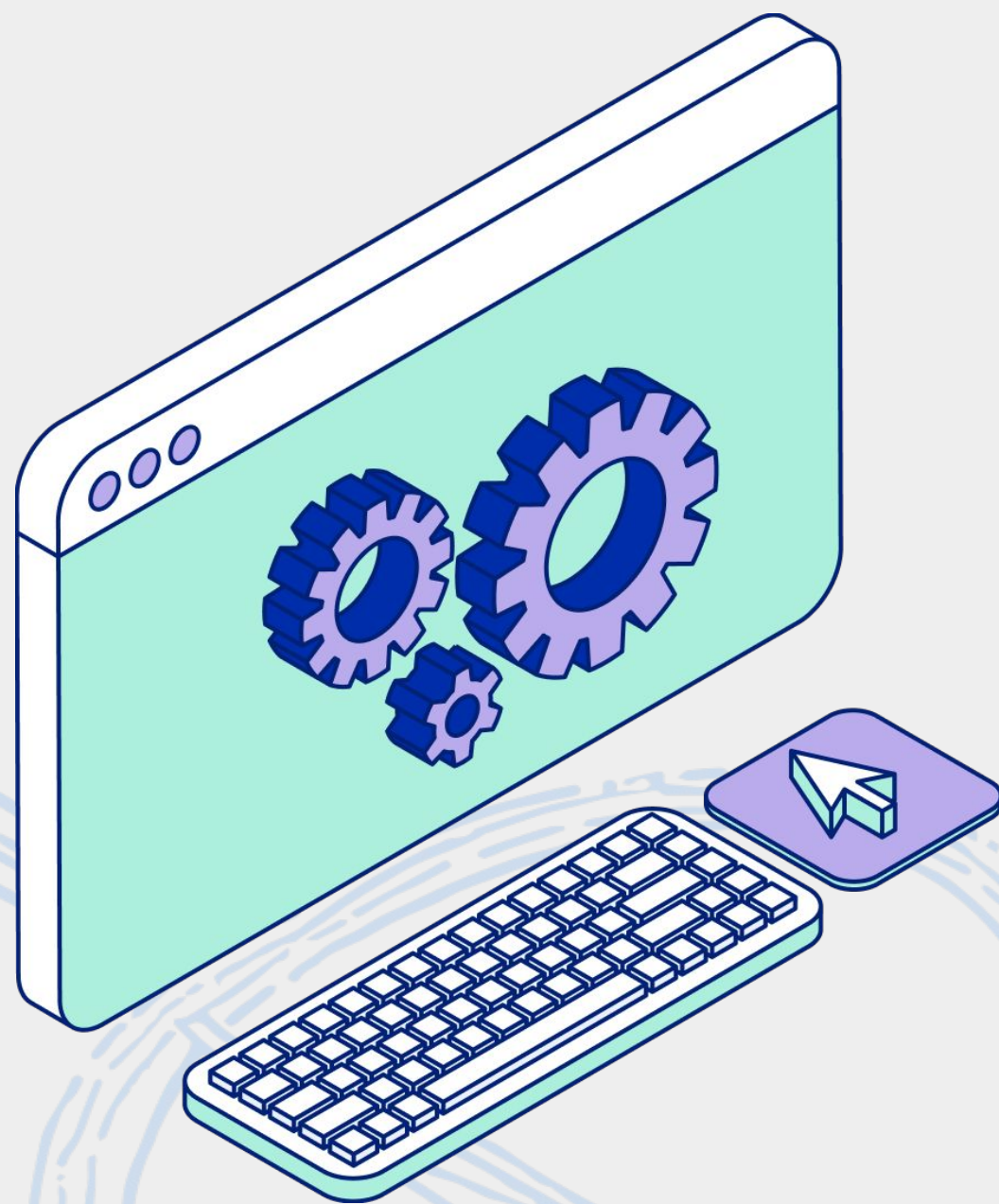
## Chapter 2

# Getting a more accurate CPA by tracking traditional channels

Many marketing teams rely on cost-per-acquisition (CPA) to measure the aggregate average cost to generate a lead and it can be calculated to analyze overall campaign or individual channel performance. CPA can provide a more granular view than other metrics like cost-of-acquiring-customer (CAC), a higher-level view that combines sales and marketing costs needed for each new customer.







CPA's more detailed view of marketing performance is also important for brands that have national or corporate marketing and local marketing teams or campaigns, since it allows you to drill down into performance at the regional level.

Without being able to track attribution in a nuanced way, including the performance of traditional channels, you are probably missing out on conversions and artificially lowering some channels' CPA and inflating others.

CPA can be calculated in one of two ways, at the campaign level or the channel level, which is an even more granular way to see campaign performance and spend efficiency.

**CPA =**  
**Campaign Cost /**  
**Conversions**

*OR*

**CPA =**  
**Spend Per Channel**  
**in One Campaign /**  
**Conversions**

For example, if you spend \$100,000 in one campaign to get 500 paying customers, your CPA for the campaign is \$200. But if you want to see how many paying customers came through your Google Ads channel, you simply take the portion of that \$100,000 campaign budget that went to Google Ads and divide that by the number of paying customers acquired from that source. So, a \$25,000 Google Ads budget for the campaign that results in 100 leads would have a CPA of \$250 in that channel.

By tracking your CPA rates for each campaign or channel—including your traditional marketing sources—you can get a real picture of your campaign and channel performance. That's only possible, however, if you have a call tracking solution that's correctly attributing leads to the offline channels that often get missed.



## Increasing ROI and Conversion Rates with Call Tracking

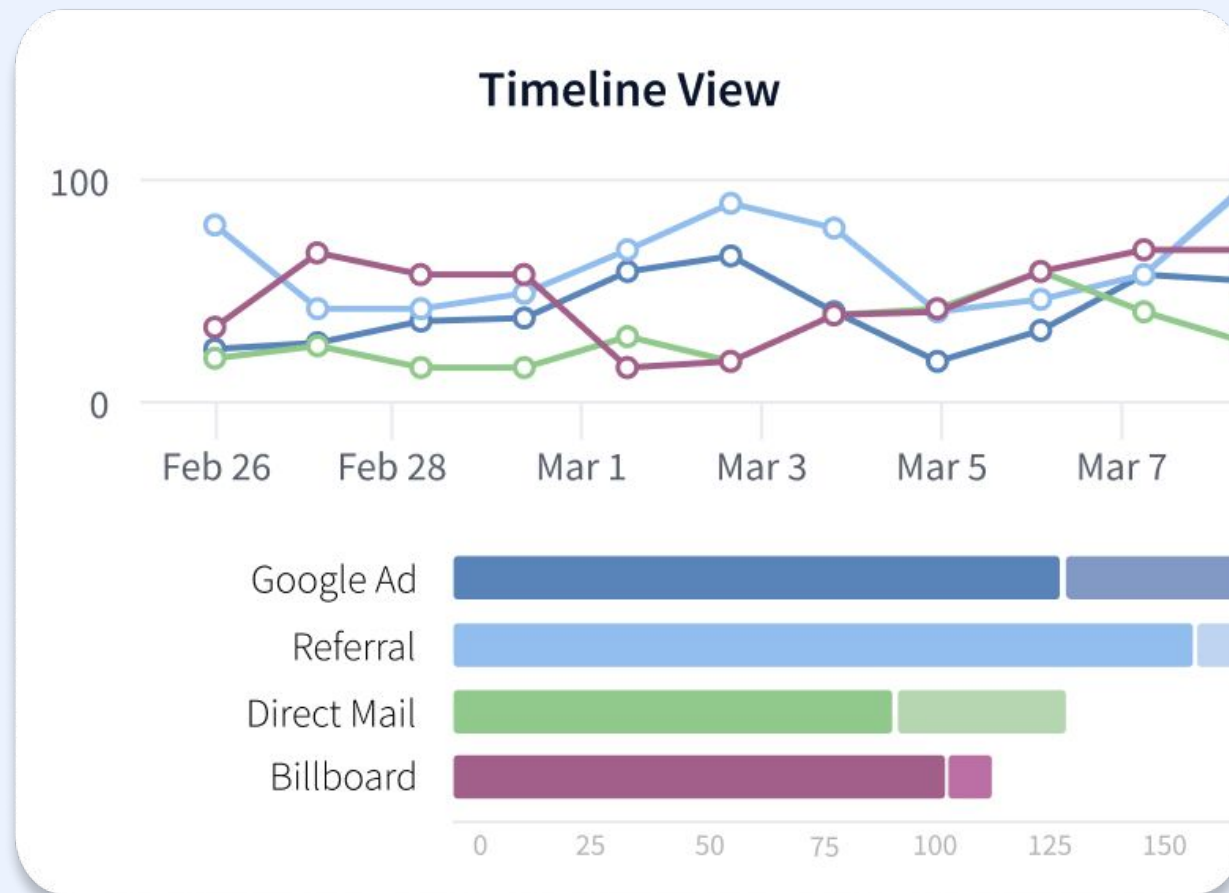
When [Workshop Digital](#), a Virginia-based digital marketing agency, decided to use call tracking for their clients, they found that adding call tracking insights made a huge impact in their client's marketing performance. They were able to increase one client's leads by 67 percent overall, and increase the ROI and conversion rates by 11 percent each. By improving conversion rates, Workshop Digital undoubtedly lowered the CPA across key channels for its clients as well.

## Chapter 3

# How a national call tracking strategy can unify data and lower costs

The concept of call tracking is simple to understand: a unique phone number is used to identify and track where incoming calls are coming from.

When you scale this up across multiple channels, campaigns, and across the country, it can quickly become unmanageable without the right solution in place. If your marketing team has local offices all using their own call tracking tool, the costs can quickly add up, and the execution may be inconsistent.



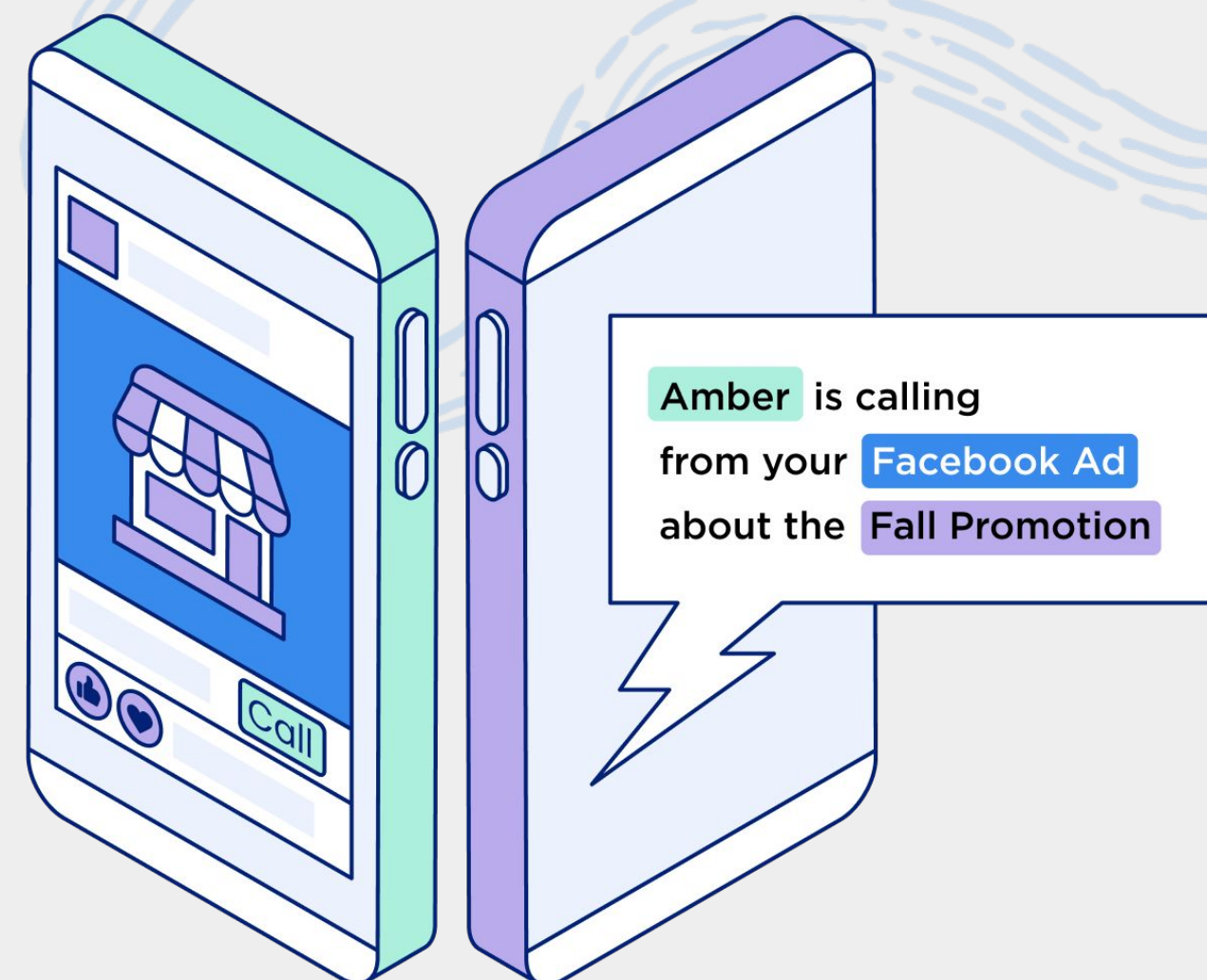


*New to call tracking? Learn more about it [here](#) with a handy infographic guide.*


A unified call tracking solution for the entire marketing team can help keep the cost down while taking the hassle out of figuring out which campaigns and channels are driving calls and conversions. Using a solution like CallRail, you can go beyond simply tracking the performance of each channel—paid search, Google Business profile referrals, billboard ads, etc.—to having this data all in one place for your entire team. It's also possible to have deeper insights into each call.

This is possible through dynamic number insertion, which uses a pool of numbers to assign a unique identifying phone number for each different caller, rather than assigning a unique identifying phone number for each different channel or campaign that every caller would use.

This lets you unlock granular, visitor-level insights, including what keywords were used for PPC ads, what pages the caller has viewed, where they're calling from, what device they're using, and much more.









Lily Han

216-999-0582

Cleveland, Ohio





Inbound call with Camilla Keating6:03pm

Outbound call with Angela BarrowsOct 11

Missed CallOct 11

Qualified Lead Milestone

Inbound recorded call with Camilla KeatingOct 8

Inbound textOct 8

First Touch / Lead Creation Milestone

Inbound call with Camilla KeatingOct 5

The benefit of having a unique identifier is that you have deep insights into individual customer experiences. That allows you to analyze the touch points that influenced your best customers, giving your team a roadmap to optimize for similar ideal customer prospects.

But individual insights aren't the only benefit of call tracking. You also gain the ability to view call performance and conversion metrics at the local and national level, which gives your marketing team the most intelligence possible to zero in on factors affecting your KPIs.

Your national call tracking strategy will give you a macro view of your digital and offline performance for your national corporate site. It can also provide an aggregate view of your local call tracking data.

CallRail 13

## Chapter 4

# The benefits of local call tracking

With local call tracking, you're using individual tracking scripts and number pools to do visitor tracking on a local level. That means you have insights at the level of the individual caller, for each web property or landing page you manage, or for the callers within certain geographic areas.

These granular insights can help you improve your key KPIs like cost-per-acquisition. When using a localized call tracking strategy, make sure you are able to manage the strategy and unify the insights within a single solution. It will help reduce the overall cost and make it easier to analyze the data holistically.

Many marketing leaders may want to opt for a mix of both a national and local strategy, because they want the detailed analytics available with a local approach and a holistic, nationwide view that comes with a unified call tracking solution.





### **Can I maintain confidentiality with Call Tracking?**

Consumers and regulators are increasingly concerned with privacy, so it's no surprise that call tracking and recording can raise questions about maintaining confidentiality—especially in highly-regulated industries like Healthcare and Legal.

CallRail is committed to helping marketers maintain confidentiality while maximizing the insights from calls to improve marketing performance and customer experience. Whether you want to maintain client-lawyer privilege or ensure HIPAA compliance, CallRail is the right solution for you.



## Chapter 5

# Making marketing experiments less risky

One of the best parts of being a marketer is breaking free from the tried-and-true approach and discovering newer, better ways to market to your customers.

With CallRail driving your local call tracking strategy, you can zero in on the key ROI metrics behind your experiments much more quickly and accurately than ever before. Whether you're trying out a new campaign, moving into a new market, tailoring campaigns to your key markets, or something else, Call Tracking will give you the granular insights you need to analyze the experiment's performance.



**What does this look like in practice? It's all about controlling the data and separating the signal from the unnecessary noise in your experiments. CallRail can help you do this by letting you:**

- **Assign a number pool to only the marketing sources you want to track**

Save money by homing in on specific tactics or campaigns, rather than tracking sources that are inconsequential or outside your control.

- **Track the performance of in-house marketing only**

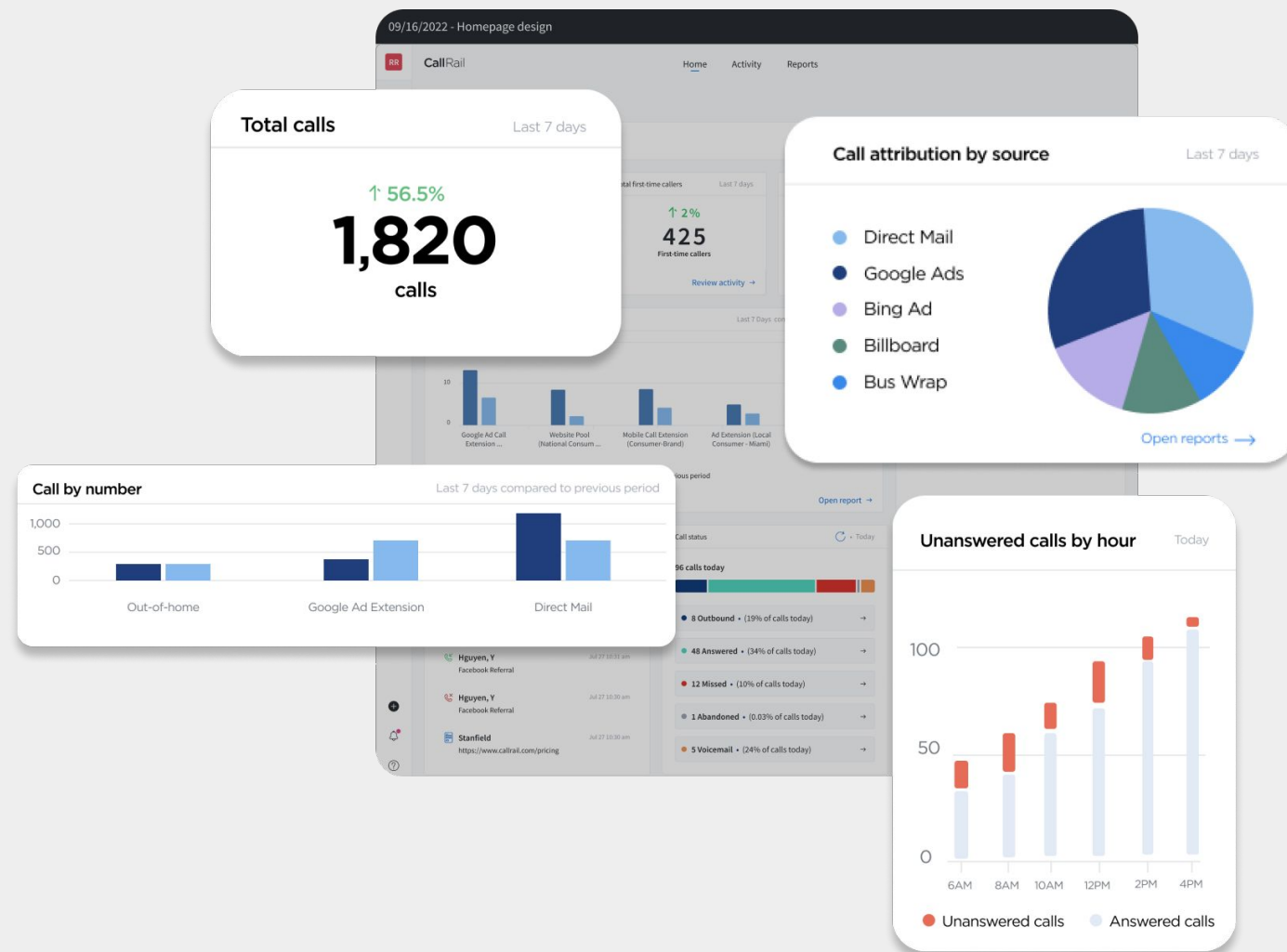
This ensures you only track metrics that impact (and are impacted by) your in-house marketing staff and budget.

- **Disregard channels that aren't impactful on your KPIs**

Customer service calls, for example, shouldn't be included in your call tracking data. Make sure you can filter out this noise for precise tracking in each channel.

- **Track the data that's only relevant to your experiments**

Running experiments in an omnichannel marketing world can be tricky. Isolate the data related to the channels you're testing to help get the clearest picture possible, such as filtering data for marketing performance in a certain city.



So even though you may be looking at Call Tracking to understand the performance of the marketing you're already doing, it's also a critical tool for any marketing team that wants to try something new to lower acquisition costs and improve conversions.

## Chapter 6

# Choosing the right solution for your national call tracking strategy

There is no shortage of call tracking solutions available to you, so how do you choose the right one for your national call tracking strategy?





## Look for the three C's: cost savings, consistency, and control.

- **Cost savings**

A unified call tracking solution that also enables local call tracking strategies is going to be more cost effective than providing each local team with their own tool. With CallRail, having corporate manage the solution also unlocks even more savings with volume discounts.

- **Consistency**

Consistent implementation is critical for data-driven marketers. With a unified solution like CallRail, implementation is easy and consistent across all locations. When it comes to reporting, a unified solution also ensures the KPIs are measured and analyzed uniformly across the company.

- **Control**

When it comes to a national call tracking strategy, there are some things you want to control at the corporate level and some things you want to give control over to the local offices.

With CallRail, corporate marketing teams can easily help local offices update phone numbers and website tracking pixels, ensuring compliance. But when it comes to reporting, individual location managers and corporate marketing leaders can both view data at the micro or macro level as needed.

Finding the right call tracking solution to power your omnichannel marketing attribution might feel overwhelming. If you're looking to get it right the first time, then trust CallRail's expertise. Our premium service will support you through every step of the process and ensure everyone from corporate that your local marketing team is ready to improve the metrics that matter most to your business.

**Don't settle for another quarter of questionable omnichannel attribution modeling.**

Give your team what it needs today.



Get a personalized demo of CallRail