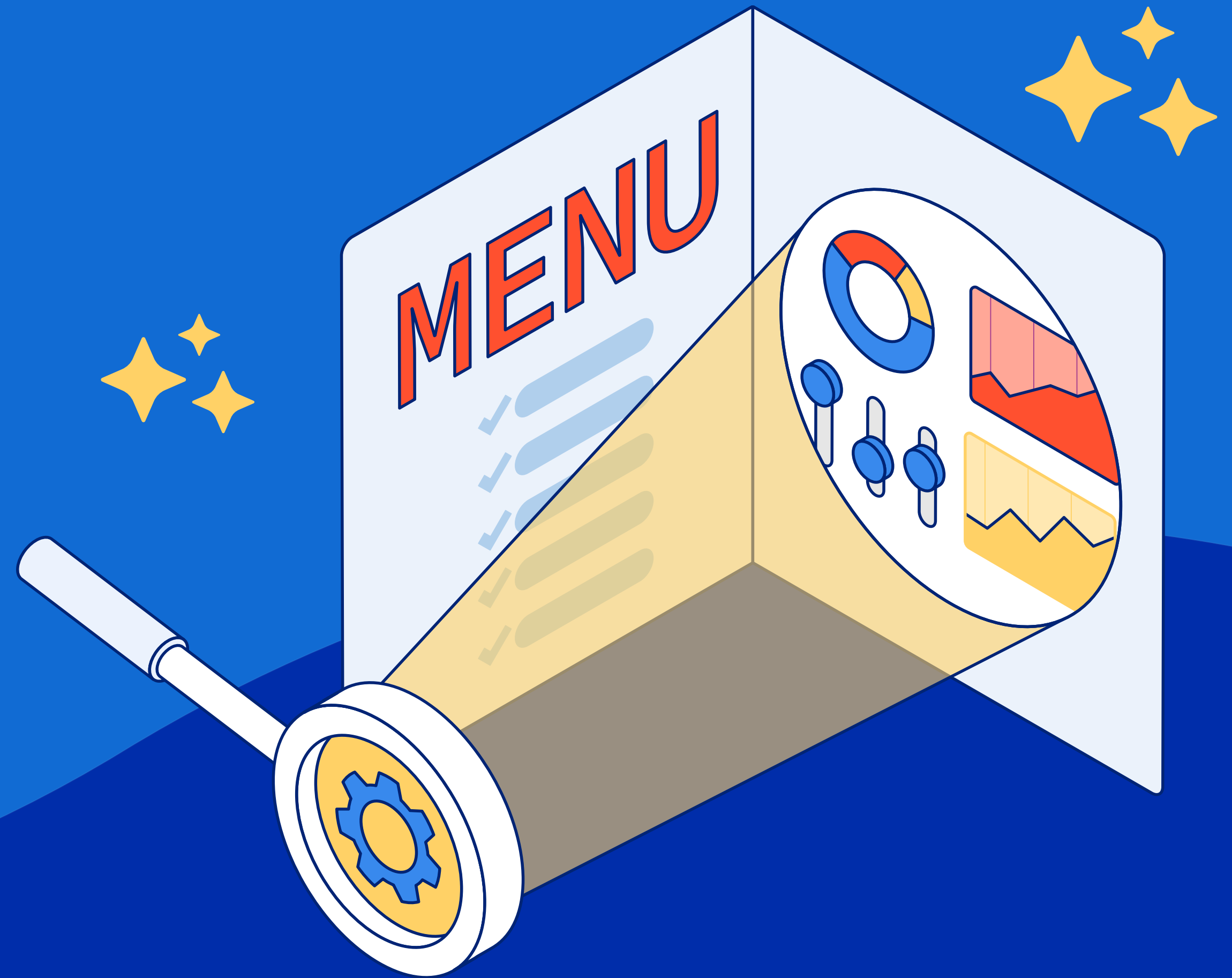


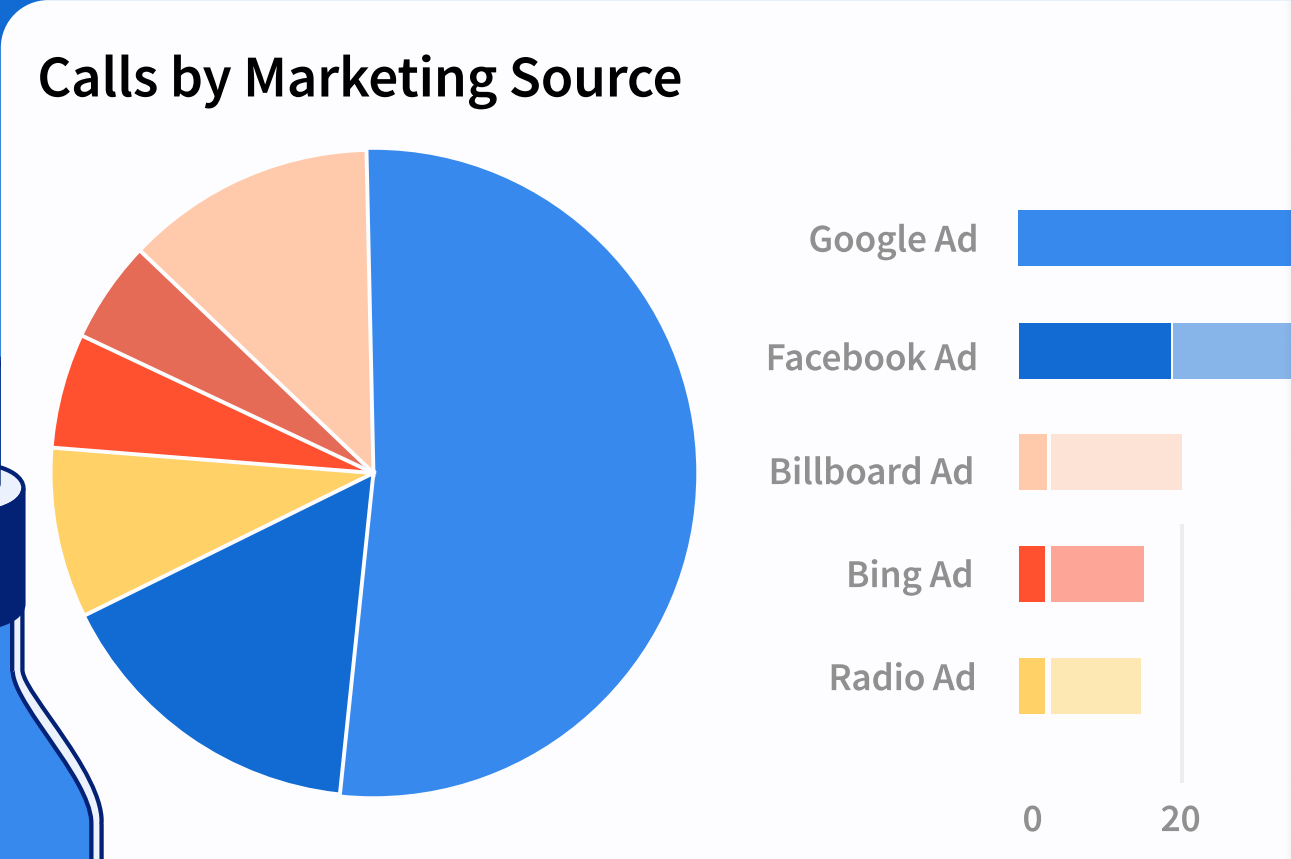
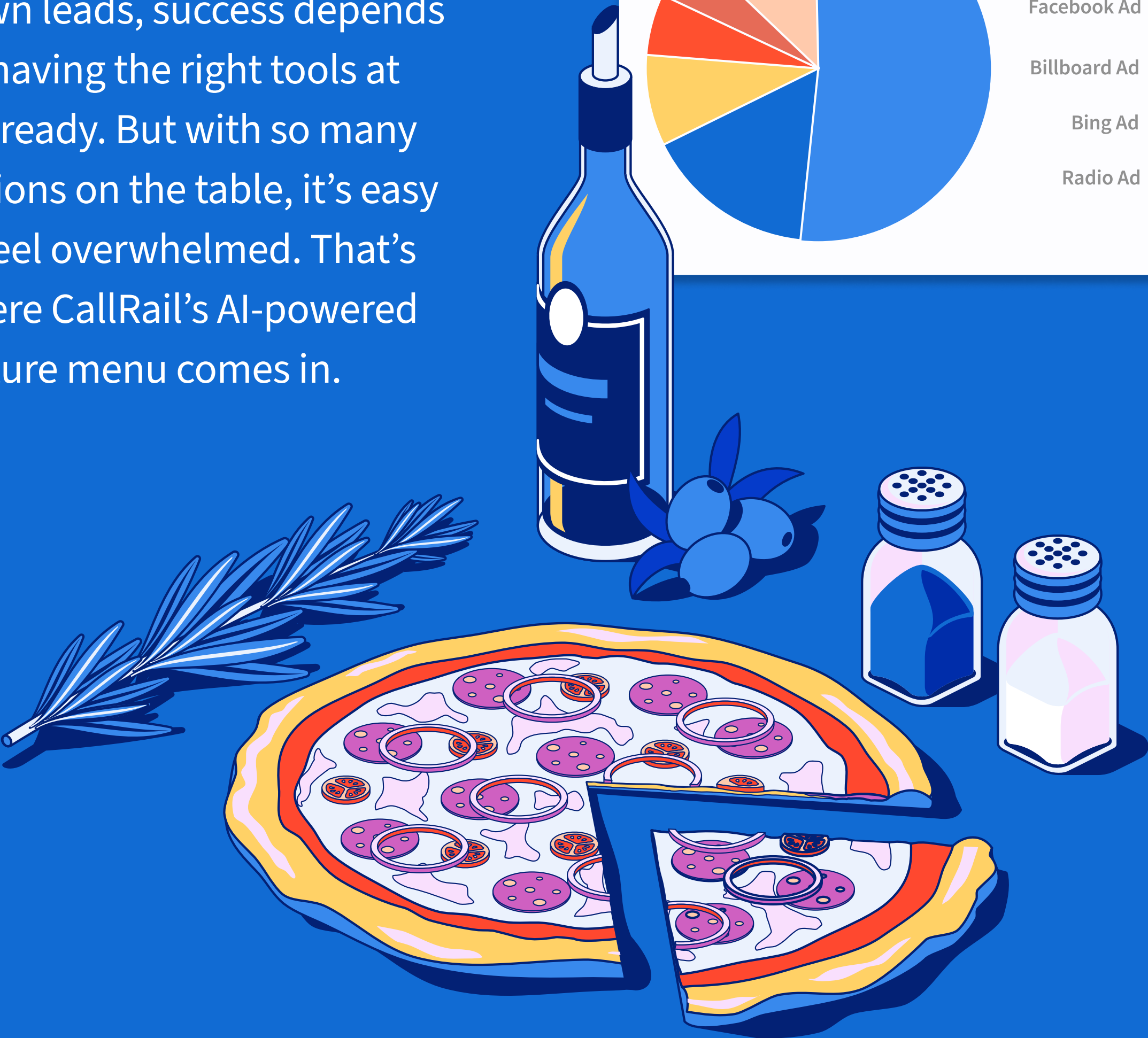
CallRail

The not-so-secret menu:

AI tools you didn't know you needed



Every great dining experience starts with preparation, and running a business is no different. From fielding customer inquiries to chasing down leads, success depends on having the right tools at the ready. But with so many options on the table, it's easy to feel overwhelmed. That's where CallRail's AI-powered feature menu comes in.



Edison Labadie

Outbound Recorded Call

3 more interactions →

SESSION INFO

Date:

Jan 15 7:12am

Company:

Belmont Bros.

Tracking number:

Email Signature 972-342-8741

Duration:

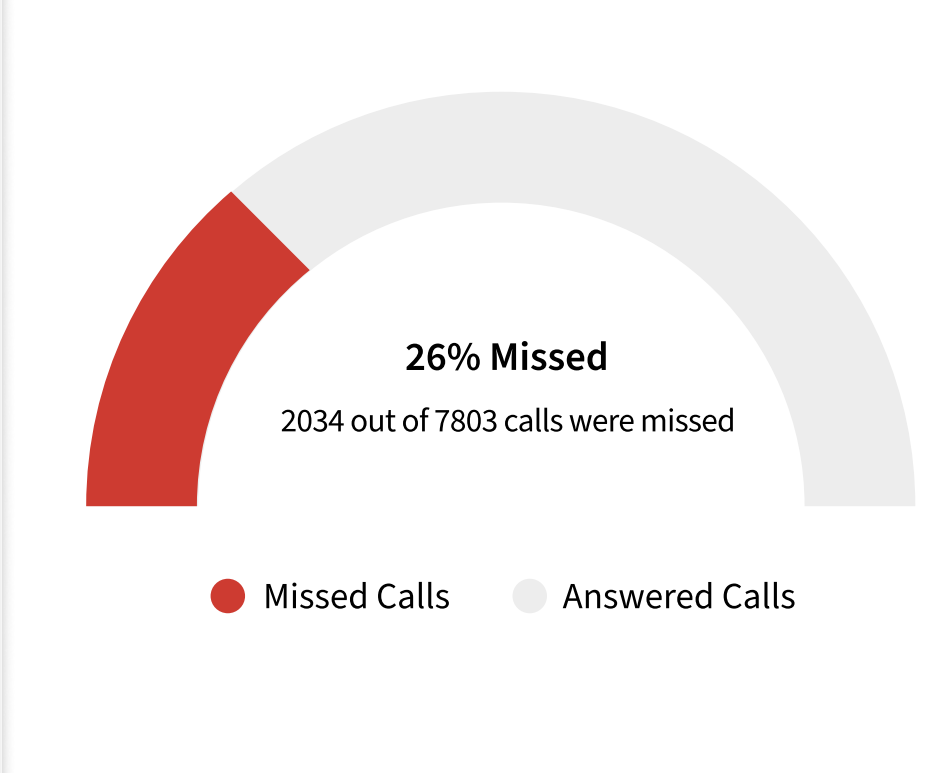
20s

Source:

Direct

00:00

Download MP3



Think of this as your guide to smarter tools: a carefully curated lineup of AI features to simplify your workflow, improve follow-up, and elevate the customer experience. Whether you're hungry for faster insights, craving better lead quality, or looking to streamline post-call actions, you'll find something on the menu that satisfies.

Take a seat and get a taste of what AI can offer.

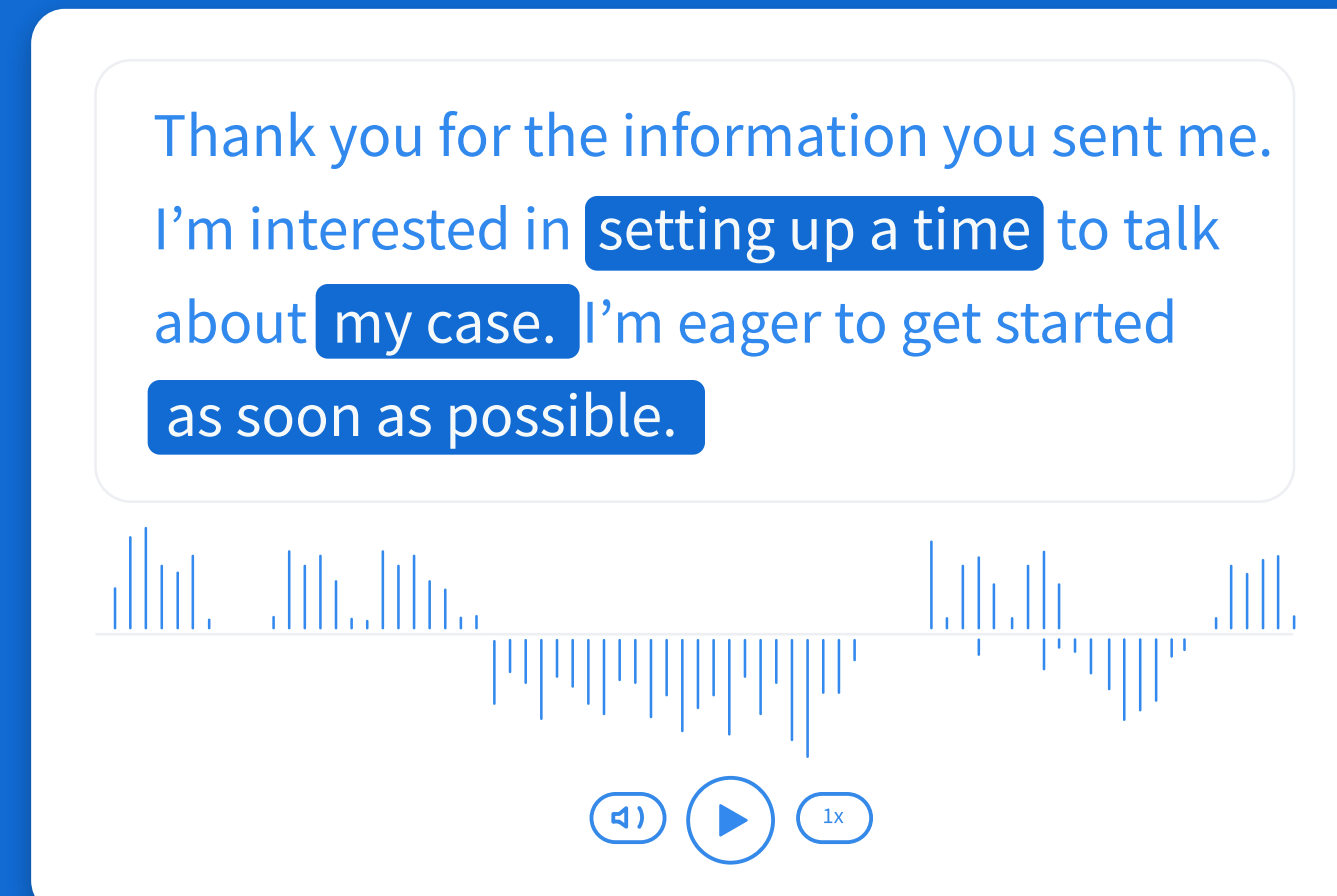
INSIGHTS ON THE MENU: UNDERSTAND EVERY CONVERSATION

Call transcripts: A clear record, served instantly

Call transcripts give you a reliable, word-for-word account of every conversation, without requiring your team to press "play." Powered by AI, this feature automatically captures and transcribes each call so you can easily reference, search, and share what was said. Available in both the CallRail platform and the [mobile app](#), transcripts make it simple to stay up to date, even when you're away from your desk.

By turning spoken conversations into searchable text, call transcripts support faster review, stronger collaboration, and more accurate follow-up. They're the foundational layer for smarter insights across your marketing and sales teams.

Available with: [Conversation Intelligence®](#)



Call highlights: Bite-sized insights with big impact



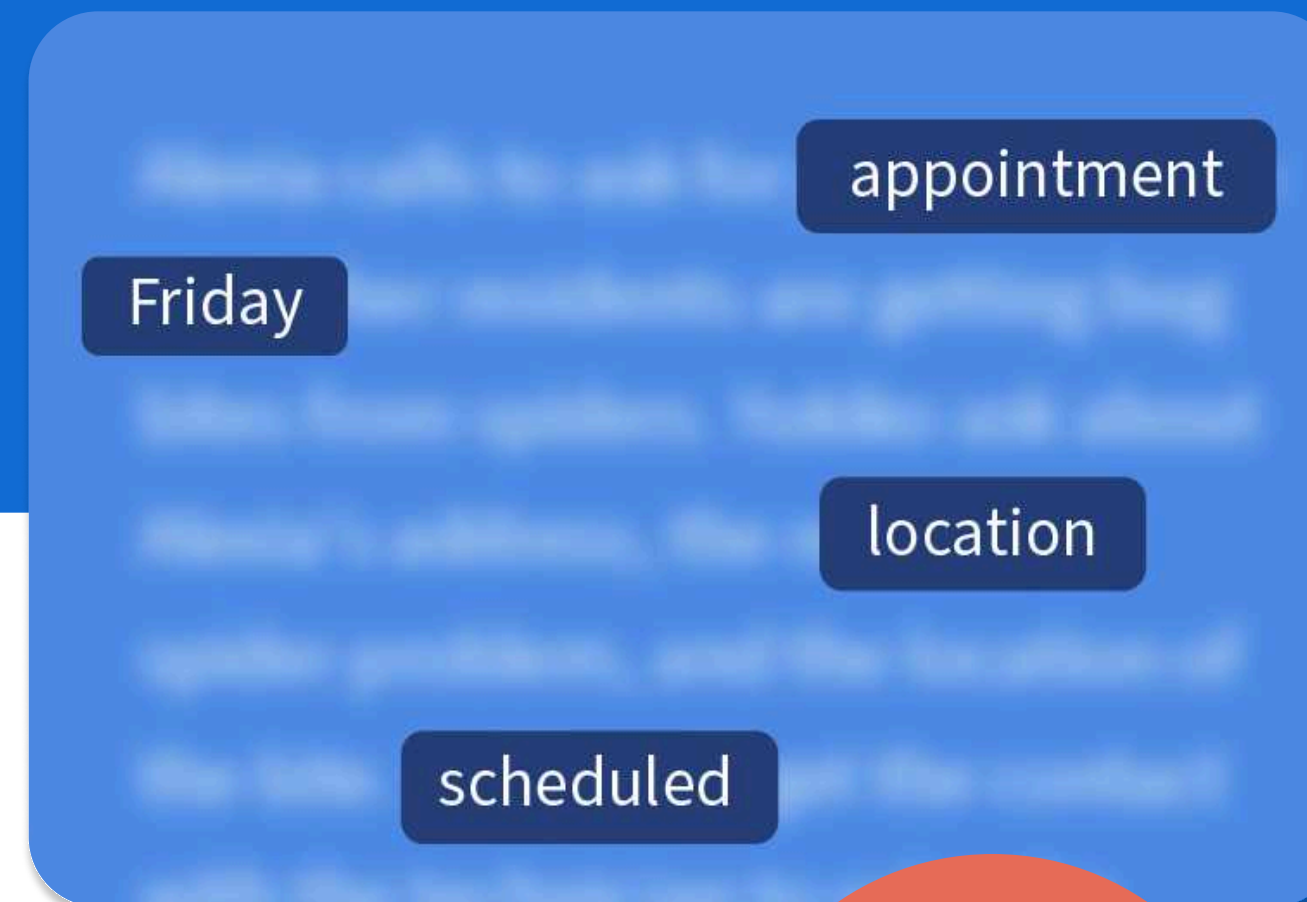
Amy Willis
Amy.Willis@email.com
216-999-0582
Source: [Google Ad](#)

Call Summary

Inbound Call on Feb.6 4:44pm

Caller wanted an appointment for Friday. Rep asked for details about the appointment and location. Appointment scheduled with field rep.

Inbound Call on Jan.2 2222 5:32pm



Call highlights help you cut through the noise. This feature uses AI to scan your inbound calls and automatically surface the keywords and phrases that matter to your business, whether you're tracking those terms or not. That means you can quickly understand caller intent, identify hot leads, and uncover new content or keyword opportunities.

The [call highlights report](#) can inform your bidding strategies, website optimization, and even your sales scripts. It also flags keywords tied to qualified leads, helping you adjust scoring models to focus on the right prospects.

Available with: [Conversation Intelligence](#)[®]

Take the temperature with **call summaries** and **sentiment**

The best insights come from both *what* was said and how it was said. **Call summaries** use AI to automatically distill the most important takeaways from every conversation into a clear, digestible format—so your team can quickly grasp what happened without replaying the full call or sifting through transcripts.

Meanwhile, **call sentiment** helps you take the temperature of your leads—gauging emotional tone (positive, negative, or neutral) to assess their readiness to convert. Are they ready to move forward? Are they hesitant? Or are they cooling off entirely?

Together, these insights give you both the data and emotional context you need to follow up faster, coach your team more effectively, and refine your marketing and sales strategies for stronger results.

Available with: **Premium Conversation Intelligence™**



Amy Willis
Amy.Willis@email.com
216-999-0582
Source: [Google Ad](#)

Call Summary

Inbound Call on Feb.6 4:44pm

Caller wanted an appointment for Friday. Rep asked for details about the appointment and location. Appointment scheduled with field rep.

Inbound Call on Jan.2 2222 5:32pm

Overall sentiment



Positive



Neutral



Negative

Self-reported attribution: Find out what really brought them in

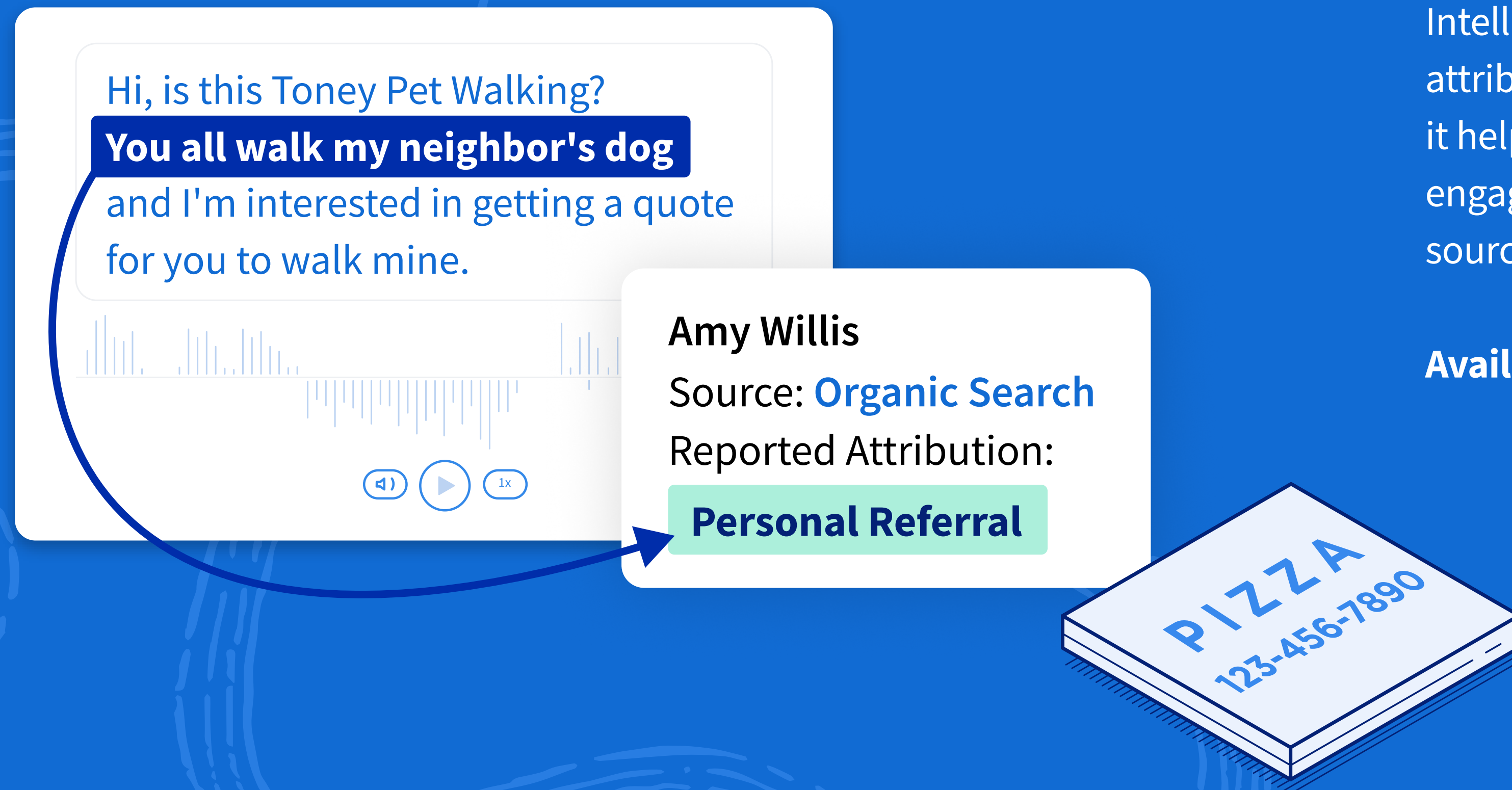
When a caller says, “I found you through a Google search” or “My friend recommended you,” that’s attribution gold.

The Self-reported attribution report captures and reports what callers say brought them to your business automatically.

No manual tagging, no guessing. Just clear, first-party insights on lead sources, directly from the customer’s mouth.

Available exclusively within Premium Conversation Intelligence, this feature adds a critical layer to your attribution strategy. Combined with Call Tracking data, it helps build a fuller picture of how leads discover and engage with your brand, so you can invest in the sources that actually work.

Available with: Premium Conversation Intelligence™



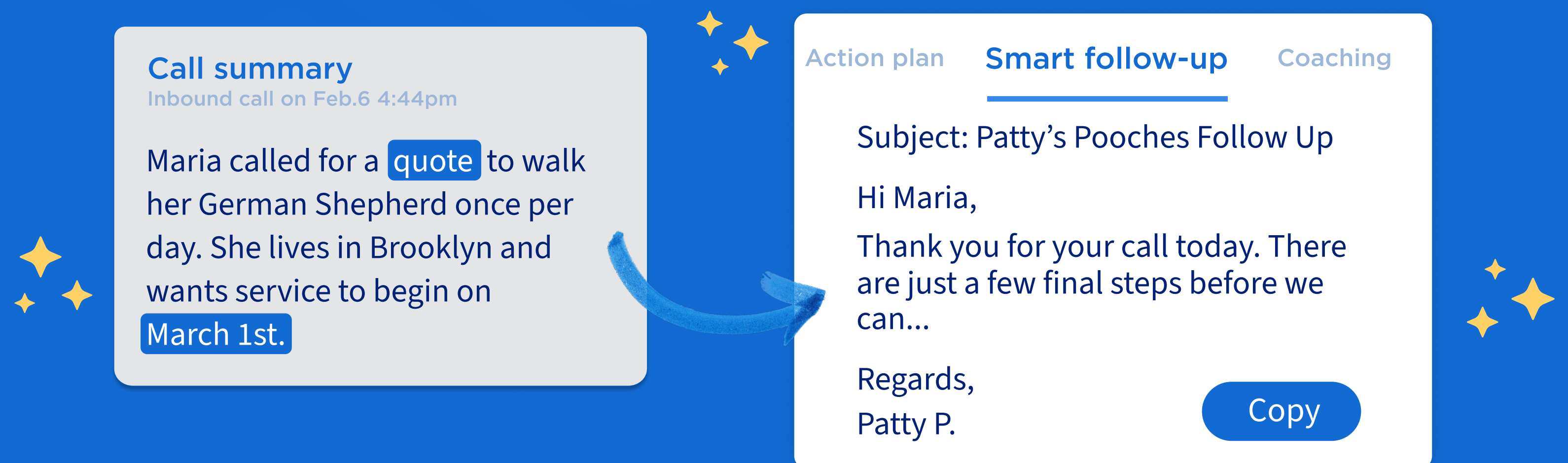
AI THAT DELIVERS: CREATING BETTER SALES CONVOS FROM FOLLOW-UP TO AFTER-HOURS SERVICE

Smart follow-up: Serving up leads while they're hot and fresh

Don't let hot leads go cold. Smart follow-up ensures that after every call, your team is ready with a perfectly timed and personalized response. This AI-powered feature automatically generates ready-to-send emails or text messages based on the content of the conversation — no more digging through notes or scanning transcripts.

By delivering prompt and professional responses, smart follow-up saves your team time while making sure no opportunity slips through the cracks. It's like having a sous-chef for your sales team — reliable, fast, and always on point.

Available with: Convert Assist



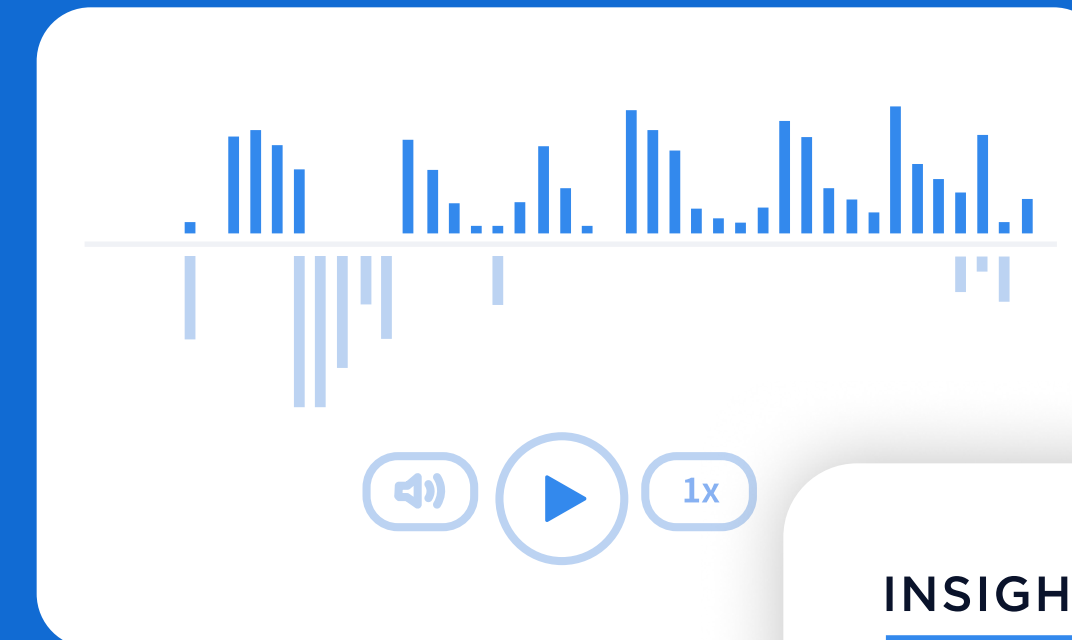
Action plan: Your recipe for next steps

After a call ends, it's easy to wonder what comes next. Action plan eliminates that uncertainty by automatically generating a personalized list of next steps after every conversation. Whether it's booking a follow-up, sending a proposal, or confirming details, this feature helps your team stay organized and move quickly. With call notifications enabled, an email with the action plan is delivered straight to your inbox, helping your team stay on top of lead activity with ease.

With built-in automation and webhook support, you can turn those steps into seamless actions, ensuring your leads stay engaged and your pipeline stays hot.

Available with: Convert Assist

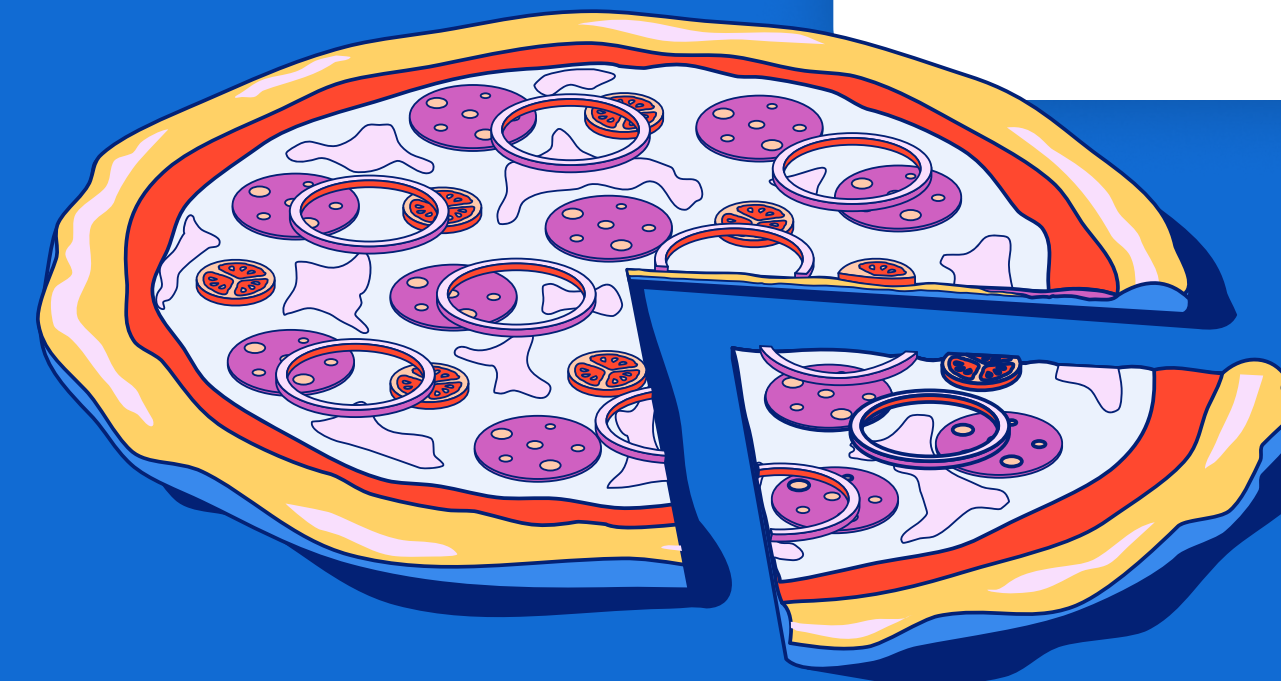
"The best part is how it uses AI – it's like having a smart assistant that helps you understand your customers better."
– Marketing and advertising agency owner



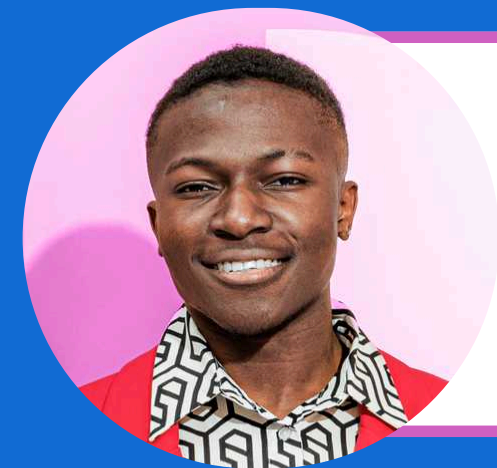
INSIGHTS

Action Plan

1. Identify technician experienced with backdrafting issues.
2. Submit request for technician to check the water heater.
3. Begin gathering estimates for direct vent or tankless water heater.



Conversation coaching: Training for top-shelf customer interactions



Isaiah Reed

Source: Google Ad

Call Received: Feb 6, 3:33pm

Action plan

Smart follow-up

Coaching

Positive:

- You greeted the caller professionally.
- You were patient and polite.

Areas to improve:

- Cut down on words like “um” and “uh”.
- Focus on value when talking pricing.

Great conversations don’t happen by accident. Conversation coaching helps your team improve by offering AI-generated insights and suggestions based on every interaction. By analyzing these interactions at scale, conversation coaching identifies patterns and provides feedback tailored to how your team communicates with customers.

Pair it with the multi-conversation insights report, and your team gets even more out of every call. Not only can you spot trends and shared themes across conversations, but your team also receives AI-generated tips, coaching points, and recommendations delivered straight to their inbox—keeping improvement accessible and actionable.

These features are especially valuable for onboarding new reps, refining messaging, and driving consistency across the board—all while keeping your team’s voice authentic and on-brand.

Available with: Convert Assist

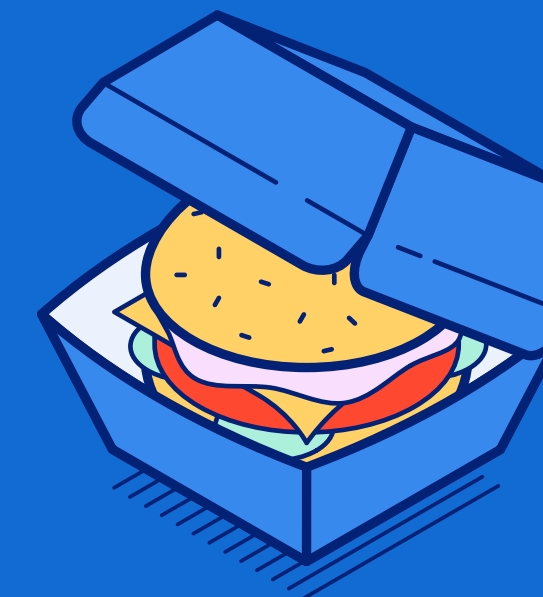
Voice Assist: Sales to-go

Sometimes you just need a quick bite — whether it's after hours, or during the busy daytime rush. For the night owls and overwhelmed teams alike, Voice Assist has you covered. This AI-powered voice assistant uses conversational AI to handle customer intake and questions about your business on your behalf - whether your staff is busy with a customer, or headed home for the evening. You'll be quickly notified of their call, allowing you to follow up with warm leads when you're available.

Voice Assist even whips up a Business Profile using your call data and website, blending your SEO and sales strategy like the perfect recipe to answer questions just the way you would. Season it to match your brand's voice and set flexible call flows to decide when it takes over. It captures all the ingredients you need — call transcriptions, summaries, lead details, and scores — so you can focus on the most promising prospects.

The cherry on top? All your attribution data is delivered in one place, ready to boost your ad ROI and sharpen your targeting. Serve smarter, save time, and cook up better results!

Available with: Voice Assist



From first course to dessert, AI enhances every bite

Your business faces unique challenges, and CallRail's AI-powered features provide the complete solution. Think of it as a four-course meal — all of CallRail's AI tools working together to supercharge your Call Tracking, maximize lead-to-customer conversion, and streamline your workflow.

Explore our AI products today!

Premium Conversation Intelligence

Voice Assist

Convert Assist

