CallRail

# 6 ways to boost AI's impact for your agency clients in 2025

Are your campaigns doing more than just driving leads? With the power of AI, you can unlock insights that go beyond basic metrics, helping your clients make smarter decisions and maximize their marketing ROI.

AI-powered tools can reveal critical details about lead quality, customer behavior, and campaign performance—all while positioning your agency as a strategic partner. From automating call insights to streamlining follow-ups, AI makes it easier to deliver real results for your clients.

**Here are six ways you can use AI to help your clients achieve their goals in the coming year.**

## 1. Understand your clients' KPIs and goals

It's important to start the new year in sync with your clients' aspirations. Better communication leads to better outcomes, happier clients, and long-lasting relationships.

**Take a moment to document important targets for each of your clients.**

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## 2. Make sure your clients' call tracking setup supports their marketing goals

Determine what kinds of data will inform your clients' goals and make sure the right tracking and reporting are set up to support them.

**Check that your clients have source tracking, call routing, menus, website pools, and dynamic number insertion (DNI) set up by following this checklist.**

- [ ] Set up unique tracking numbers for each marketing campaign you want to track.
- [ ] Ensure tracking numbers are forwarded to your clients' main business phone.
- [ ] Create a website pool to identify the unique leads that land on your clients' websites.
- [ ] Install CallRail's JavaScript snippet onto your clients' websites to track lead sources.
- [ ] Set up notifications for calls and texts to your tracking numbers and lead activity summary emails.

## 3. Qualify your leads and analyze your call data

Lead qualification and data analysis are important to marketing agencies because they help your clients close more deals and learn more about their own customers. Call Tracking, when paired with Conversation Intelligence®, uses conversation keywords and caller data to assess whether a lead is ready for a sale. Then AI takes the heavy lifting off your plate by "listening" to sales calls and automatically identifying leads most likely to convert.

**Data to examine using Call Tracking**

**Number of calls from the campaign:** _____

**Number that are qualified leads:** _____

**Number of sales:** _____

**Tracking number from which most calls are coming:**

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Call Tracking gives you a more complete reporting picture by providing call attribution, meaning you can see which marketing campaigns drove which calls.

## 4. Streamline call data within a single interface

Some of the most valuable information your clients can gain include their customers' most common questions, most frustrating pain points, and sentiment about their brand. An AI-driven tool like Premium Conversation Intelligence™ gives you those answers from the calls you're already having with customers.

**Keywords to track with Premium Conversation Intelligence**

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Premium Conversation Intelligence uses AI to automatically spot keywords and provide call summaries and call sentiment analysis.

## 5. Follow up with clients automatically

Convert Assist can handle time-consuming follow-ups for you and your clients with its AI-driven capabilities. For each call, the tool provides users with next steps, ready-to-send customer messages, and real-time coaching.

**Document your typical post-call follow-up steps**

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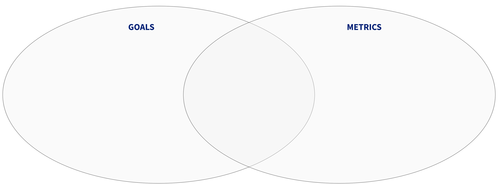
Convert Assist insights are now available via webhooks, enabling seamless integration with your client's CRM. Access AI-driven follow-up recommendations, call summaries, and more directly from their existing tools.

## 6. Use AI to understand marketing campaign results

Check AI-powered insights to see whether conversions are actually translating to revenue for your clients. AI makes reviewing call data fast and painless. Look for overlap between your customers' goals and the metrics you are driving.

**Add your customer goals in one circle and the metrics you're driving in the other circle. Which of these overlap?**



Make sure your clients are getting the most from AI by using CallRail's Convert Assist in the new year.

**Sign up now for your free trial**

CallRail