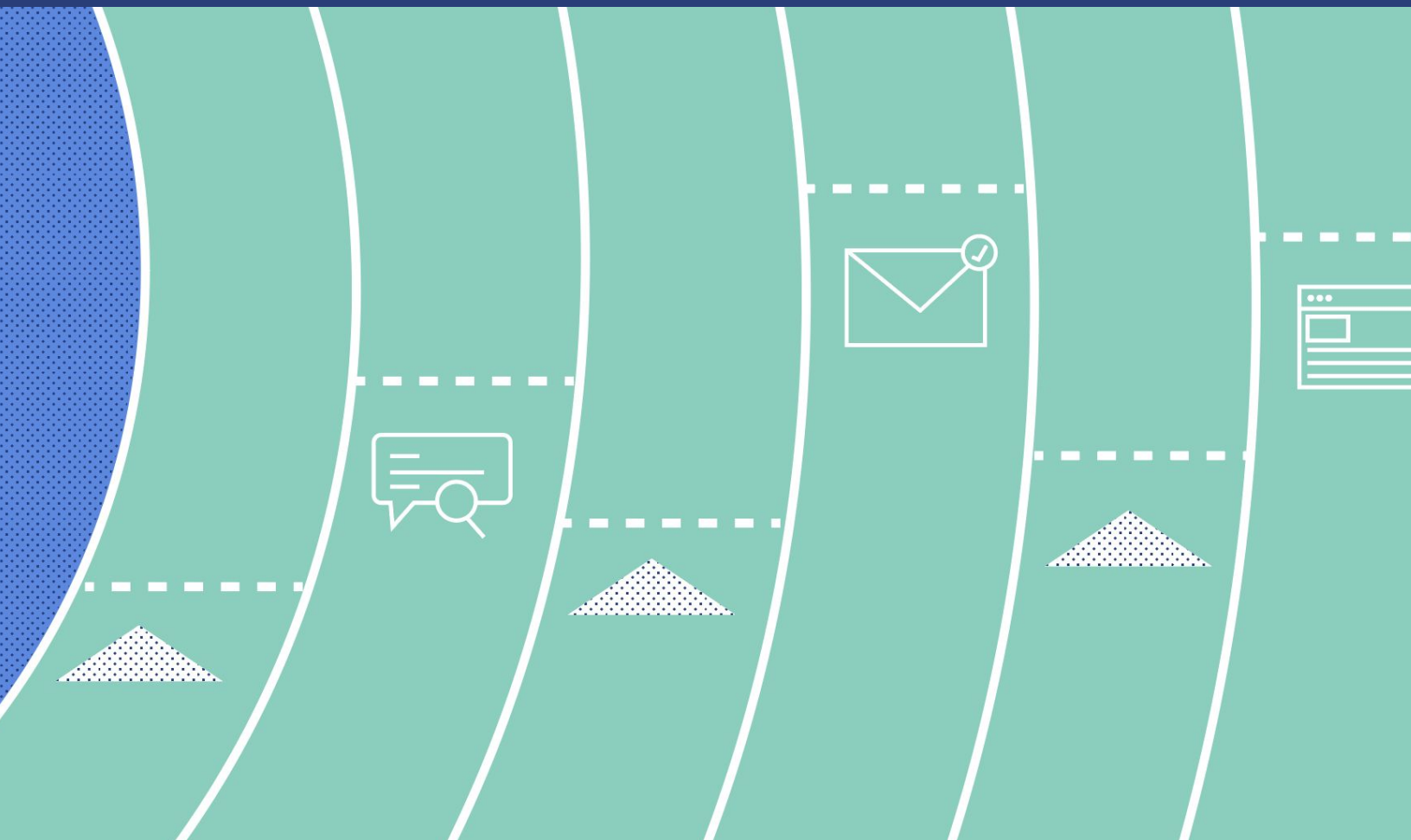


CallRail

The agency marketer's guide to proving ROI to clients



Introduction

Proving ROI from your agency's marketing efforts to clients isn't always easy. In fact, [28% of small and medium-sized businesses](#) say they have no transparency in how their budgets are used by their agency partner.

Clients want to understand which digital ads, keywords, and marketing campaigns result in the valuable calls and form submissions that affect their bottom line — and they deserve to.

Agencies that use CallRail can easily prove the worth of their work. They also generate more leads and save more money on the marketing activities they help build and manage.

Let's dive into how you can take the guesswork out of what's currently working — and what isn't — for your clients.



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1. Show clients how pairing their SEO strategy with call tracking grows leads

Helping your client appear at the top of search engine results pages (SERPs) they care most about, whether that is through a featured snippet, Q&A section, local listing, or an organic ranking, is important work. So is reporting on your [search engine optimization \(SEO\)](#) progress and the value your agency is delivering to your clients.

Example goals for SEO to help show ROI:

- Increase *traffic* from non-branded search to service pages
- Increase *conversions* on BOFU pages from branded search
- Increase *inbound phone calls* from organic traffic
- Increase *revenue* generated from organic search sourced leads

We've found that [38% of small and medium-sized businesses](#) want agencies to help them better track leads, including those from phone calls.



QUICK WIN: Call tracking gives you more data on how SEO is performing. An easy way to start showing the true ROI of your SEO efforts is to track calls by source.

Here's how:

- Discover how many qualified leads come in through phone calls when they find your client via organic search
- Monitor the entire customer journey of leads from organic search in one convenient location
- Listen in on conversation recordings or explore conversation highlights of calls from organic search to understand prospects' search intent and even uncover new keyword opportunities.

Understanding how many leads come from your SEO efforts and the quality of those leads will help you optimize future marketing strategies and efforts. Pairing your SEO efforts with [Call Tracking](#) and [Conversation Intelligence](#) from CallRail gives you the tools you need to make it happen for your clients.

CALLRAIL SPOTLIGHT: Included with Conversation Intelligence, [Call Highlights](#) detects commonly used words or phrases using automation and AI, improving lead scoring models and keyword strategy. This data can also enhance keyword strategy to execute better pay-per-click (PPC) campaigns.

Building an effective SEO strategy with call tracking [The right SEO strategy](#) can help your client's website rank higher in search engine results.

Although algorithms are constantly changing, consistently providing unique content, improving website accessibility, staying mindful of user intent, and using a combination of relevant keywords and high-quality internal and external links are all part of an effective SEO strategy.

These three tips can help your agency improve your client's ROI on their SEO efforts while streamlining and enhancing customer service experiences:

1. **Make sure your clients have profiles in online local business directories.** Services such as [Google My Business](#), Google Maps, Facebook, and Apple Maps can help businesses get noticed. Ensure your client has in-depth profiles on each platform that describe the services they provide. This will ensure they appear in related search results and queries.
2. **Create content pages related to customer needs.** Who's your client's ideal audience? What are their needs? Organizations that establish themselves as trusted sources of information build trust between themselves and their target demographic.
3. **Improve customer engagement.** Whether they are filling out a form, engaging with a live service rep, registering for a webinar, or downloading a whitepaper, consumers want convenience. Helping your clients provide this will improve revenue and increase customer loyalty.

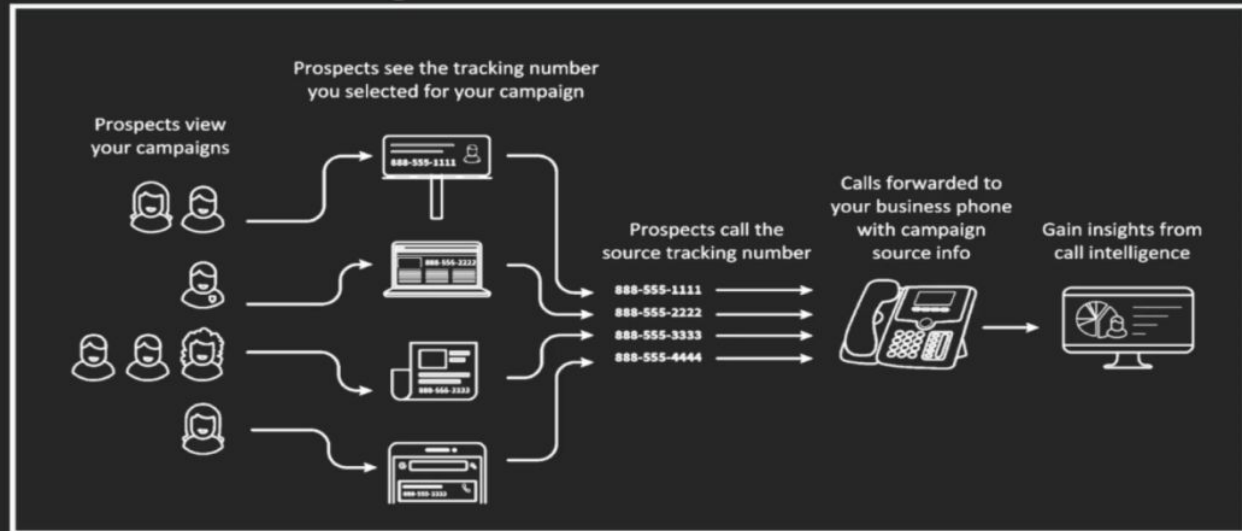
2. Focus PPC campaign ROI on conversions, not clicks

Tracking impressions and clicks for [pay-per-click \(PPC\) campaigns](#) doesn't give you a full, ROI-focused data story for your clients.

With any ad services, clients want to know the dollar-for-dollar ROI for their ad spend. On top of that, 28% of small businesses reported having no transparency into how their budget was used, according to our recent study.

Look beyond measuring PPC campaigns with top-of-the-funnel (TOFU) engagement metrics by reporting on how this channel is improving overall lead generation.

Source-Level Tracking



Example goals for PPC to help show ROI:

- Increase *inbound phone calls* or *website form submissions* from specific keywords
- Increase volume of *middle interaction touches* from paid search
- Reallocate budget to campaigns/ad groups with higher *lead to SQL conversion* rates

When you show your client how you are optimizing for direct conversions, affecting their overall lead generation pipeline, and optimizing their budget, you can build your agency up as a more strategic partner.



QUICK WIN: Pairing your native Google Ads or Bing ads reporting with CallRail Call Tracking gives you more detail on outcomes of the calls you generate so you can report successes and learn from real customer interactions.

Here's how CallRail helps businesses create memorable PPC campaigns

An impactful PPC campaign strategy should start with a specific end goal, whether it's attracting new customers, generating sales leads, or improving customer retention. Combined with CallRail Call Tracking, Conversation Intelligence can quickly transcribe phone calls so clients can better understand what customers want. It can also improve PPC campaigns by identifying frequently-used words and phrases you can use to optimize ad keywords.

- **Keyword research.** Conversation Intelligence uses artificial intelligence (AI) to surface key terms and phrases callers actually use on the phone with your team. Compare these key terms to the keywords you're bidding on, and you might be surprised. Maybe you're spending too much on keywords prospects don't use — or too little on those they do. You can use what you learn to make the most of your client's budget.



- **Improved creativity.** Different ad elements yield different results. Knowing what your audience wants using CallRail insights allows you to experiment with copy features, visual elements, and ad placements. Playing it safe by only using strategies that have performed well in the past could prevent you from discovering other successful marketing techniques, but knowing what your audience is drawn to can help you create more effective ads.

- **The right call to action (CTA).** Failing to feature a straightforward call to action can hinder your PPC campaign. Whether you're offering a free guide, a complimentary trial, or first-time consultation, using compelling, keyword-rich ad copy and a strong CTA will create a sense of urgency.

- **Tracking.** CallRail helps agencies monitor their clients' PPC campaigns by using data-driven analytics to gauge ad effectiveness. Tracking tools gather feedback and insights, identifying each campaign's strengths and weaknesses and overall impact on inbound calls. [Automation Rules](#) monitors inbound phone calls and [Call Highlights](#) analyzes them, both pinpointing the ideal keywords and phrases to target through PPC campaigns. CallRail's platform also works with Google Ads call data, providing businesses with an in-depth snapshot of campaign performance.

3. Level up social media ROI with powerful analytics

[Social media](#) can be vital in increasing revenue and customer loyalty, depending on your client. If you're providing social media marketing you understand that growing a client's social presence involves identifying and targeting their audience, making the most of their best channels, creating quality content, and using paid or boosted influencer marketing campaigns. However, it can be difficult at times to show the true ROI of these specific social efforts.

That's why many agencies opt to calculate their ROI value from these social media efforts by using the engagement statistics provided by individual social sites, campaigns, and content. This ROI value can come in the form of social proof, customer retention and satisfaction as well as brand awareness.

The top engagement statistics for social media marketers to track are:

- Likes
- Engagement
- Follower growth
- Traffic conversions
- Social interactions
- Social sentiment
- Social visitor goals
- Social shares
- Website visitors from a social channel
- Social visitor conversion rates

Tracking these specific value KPIs allows you, and your clients, to understand their social impact, to improve their social standing if necessary, and properly allocate time and resources to the campaigns that are converting. Prior to calculating your ROI value you'll want to set goals for these specific social media metrics with your clients.

Lead Attribution by Source



QUICK WIN: Set specific goals for each individual metric and implement tools, such as call tracking, in order to better report on these specific metrics to meet those goals.

Here's how [CallRail Call Tracking](#) can benefit your client's social media reporting:

- When you're able to track phone calls you'll understand which are being driven by your social media efforts
- You can assign a different phone number to each of your client's social media channels to get a better understanding of which channels are the most effective at driving phone calls
- As you collect and analyze this call data you're able to better optimize your social media efforts for your clients



Implement CallRail to expand client reach and show true value ROI

[Call Tracking](#) allows your client's to map their customer calls back to their original sources. When an influenced visitor leaves the social page and picks up the phone to call your client's business, you will be able to report on that original source and allocate value ROI to the social channel and social campaign.

[Conversation Intelligence](#) will take those phone calls to the next level by automating transcriptions and then surfacing key findings so you can see which posts brought those customers to your client's business and monitor trends.

If you implement paid social posts and ads, CallRail's [Urchin Tracking Module \(UTM\) parameters](#) can help you collect important data, gain a clear understanding of the big picture, and analyze the successes of each marketing campaign.

Read our case study:
[Social Media agency uses CallRail to drive a 250% increase](#)

With CallRail's suite of products you are able to get insights into your social media campaigns that will help you prove the value ROI your clients are looking for.

4. Improve ROI with sales enablement and call tracking software

[Sales enablement](#) can demonstrate ROI to clients by identifying and remedying workflow obstacles as well as improving time and resource management. In fact, [43% of surveyed small businesses](#) would like their agency partner to improve workflows between sales and marketing. This process explores each aspect of your client's marketing and selling lifecycle, from performance audits to sales team training. This can be a great way to add value to your clients while adding services to your retainer.

To prove ROI for clients, it's helpful to set a baseline and report on progress in the following areas:

- Is your client meeting their sales goals?
- Is the client's sales team using the right tools?
- Where are opportunities getting stuck in the sales process?
- What is your client's average time to close on a new prospect?
- What are the common objections your client hears in the sales process and how do they respond?

Getting started with reporting can be challenging if you don't have the right tools to track KPIs like time-to-close, win-loss ratio, and average touches to close.



QUICK WIN: Assess the tools your client uses and make recommendations to improve processes, add value to reporting, and empower their sales team. If your client already has a CRM they love, outreach tools to track emails and calls, plus workflow automation capabilities, a great way to level up is with call tracking.

CallRail [Call Tracking](#) and [Conversation Intelligence](#) software gathers important data from call sources, additional interactions, and transcripts to identify data points and insights that can improve strategies used by your agency and your client's sales and marketing teams.

Some resources that can also help in your quest for proving ROI in your sales enablement services for clients:

- [How to choose the right attribution model to assess your sales enablement programs](#)
- [Validate your sales enablement strategy with better reporting](#)

Another benefit for you as an agency partner is the consolidation of your client's lead and customer interactions into a single interface. Your client's sales team will have the ability to view individual customer histories, guiding future interactions and strategies for more effective sales and marketing efforts.

5. Make print marketing campaigns more effective

Print marketing should include ways to track conversions for your clients. With billboards, magazine ads, direct mail, and more, you can level up your reporting to track exactly how many calls came into your client's business and gauge the quality of those calls.



QUICK WIN: Did you test different neighborhoods, ad creative, headlines, or ad placements? Use different tracking numbers on each segment you are testing so you can report on calls generated from each and show your client exactly which segment performed best.

Want to learn more about testing your print campaigns? Check out our blog, [*Test Direct Mail Marketing Campaigns Using Call Tracking*](#) for tips that can be applied to your clients' print campaigns of all kinds.



With call tracking in place, you will have the data you need to calculate the true ROI of your clients' print campaigns. Here's a tried-and-true process for using that data:

1. Calculate the total marketing spend for your campaign. This should include printing costs, postage if applicable, and the cost of any specific software such as direct mail automation tools.
2. Use your Call Tracking data to tie every lead back to that print marketing campaign.
3. Find out how many of those leads turned into customers.
4. Calculate how much total revenue those customers brought through your print marketing campaign.
5. Subtract the marketing spend from Step 1 from the revenue calculated in Step 4. This is the ROI from your print marketing campaign.

CallRail Call Tracking and Conversation Intelligence software offer insights into customer preferences and trends, helping agencies develop more effective messaging and overall strategy for clients to connect with prospects.

This information can also be used to build, customize, and share reports that help clients shape the story behind their print strategies, leading to more relevant campaigns and higher conversion rates.

The screenshot displays the CallRail interface for a specific customer, Elizabeth Griffin. The left sidebar contains navigation options for CALLS (Call Log, CallScribe Search, Unique Callers, Voicemail), TEXTS (Text Conversations), and FORMS (Form Submissions, Search Submissions). The main content area is titled 'Timeline > Elizabeth Griffin' and includes a profile card with contact information (213-209-8354, Los Angeles, CA), interaction statistics (Total Interactions: 18, First Call: Oct 9, 2019 1:40pm), and tracking details (Main Pool, Google Organic). Below this is a waveform visualization of an 'Inbound Recorded Call' at 2:17 PM, with playback controls. A 'Highlights' section lists terms like 'ASAP', 'whistling', 'diagnoses', and 'repairs'. A 'Keywords Spotted' section lists 'appointment', 'schedule', 'quote', and 'service fee'. A transcript of the call is visible at the bottom, showing a customer's issue with an AC unit and the agent's response to schedule an appointment.

6. Enhance your client's multichannel strategy

An impactful multichannel strategy is another way agencies can prove ROI to clients. A multichannel presence is more important than ever. Today, potential customers communicate with businesses over the phone, through social media networks, in brick-and-mortar locations, and through digital marketplaces.

Customer behavior has changed dramatically over the past few years. Within seconds, consumers can now research, access, and purchase goods and services. A smart multichannel marketing campaign can lead to increased sales, improved ROI, and enhanced customer loyalty.

Which interactions lead to conversions?

CallRail can improve your client's multichannel strategy by tracking and recording each step of the discovery process, even if customers use multiple channels to find your client's product and eventually make a purchase.

This multi-channel attribution data can help clients develop more focused ad campaigns in the future. Understanding how customers find and interact with each channel before the conversion process makes it easy to recognize the most effective marketing channels, from online campaigns to offline call conversions.

CallRail's core Call Tracking solution makes it easy to follow, organize, and respond to leads from inbound calls and your client's website. Its features are driven by analytics and artificial intelligence, enhancing engagement with your client's target audience through multichannel marketing and sales strategies. Over time, these services can build upon your sales and marketing strategy.

CallRail

Prove ROI to clients with CallRail

Using real-time data, automated scoring, and other streamlined tools and services, CallRail can help you demonstrate the value your agency brings to clients. [Start your free trial today.](#)

Start Free Trial

