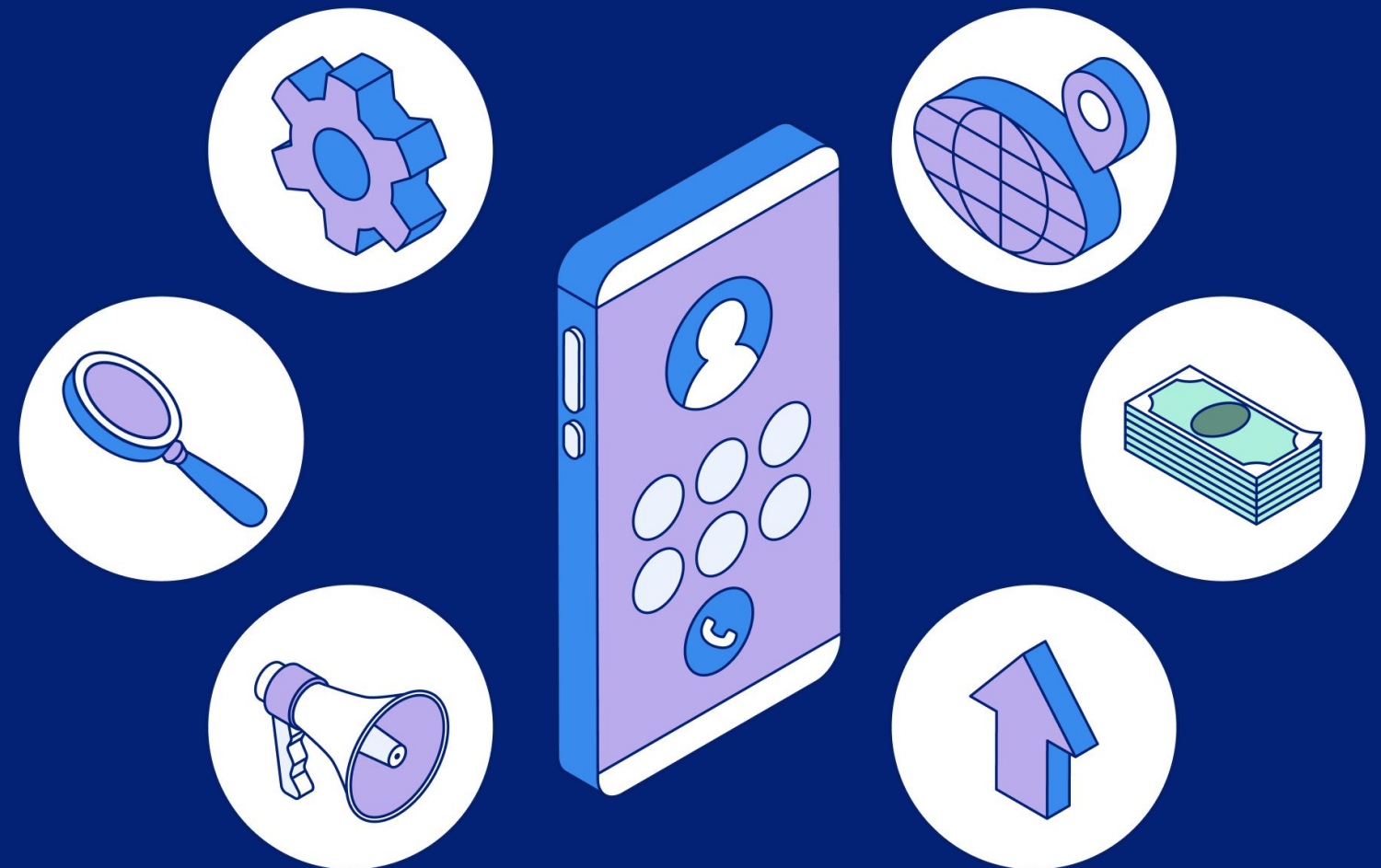


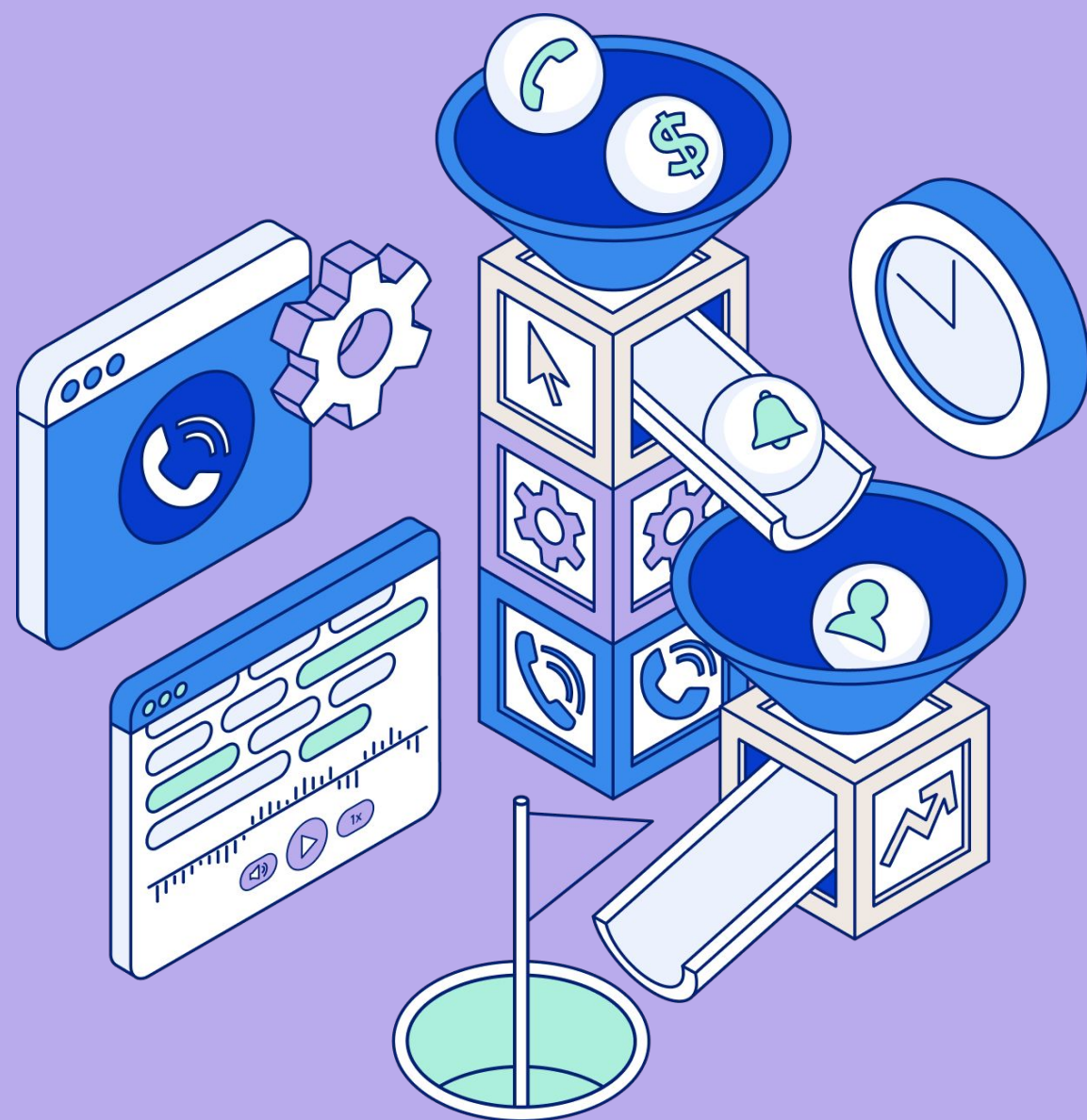
CallRail

Ebook

# Out with the old: How businesses are updating their call strategy

Modernize how your company  
drives value from calls by  
switching from the old way of  
doing things to the new way.





# Introduction

A lot of modern marketing happens online through digital touchpoints that don't involve speaking to your team. So, when someone does call your business, it's usually because they are a hot lead or desperately in need of human help. Not only should you welcome these calls because they are likely to lead to sales – phone calls to businesses still influence more than \$1 trillion in U.S. consumer spending – but also because there is more value behind call data than any other channel.

Yet, many businesses are missing out on the deep insights calls can provide because they're still thinking about calls in the old way of traditional marketing and call technology. In this ebook, we'll show you how to switch from your "old way" call strategy to a "new way" that will allow you to tap into the full value of your phone calls with modern technology.

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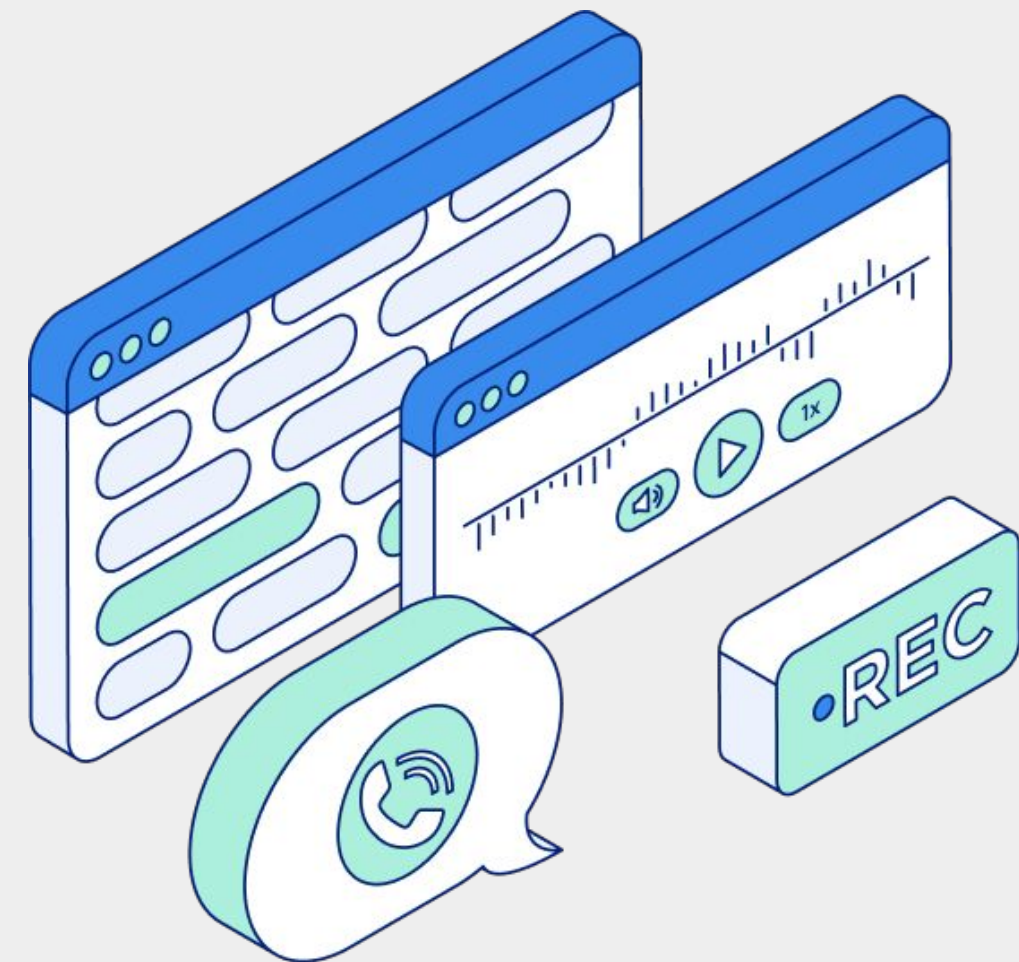
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## Chapter 1

# Know which ads or marketing are effective



### THE OLD WAY

Before omnichannel marketing became a thing, you were probably running one ad or a flyer at a time – and it was much easier to track how effective it was. You were also getting most of your leads by phone, so you could just ask, “how did you find us,” and the answer would be either the local newspaper ad or the phone book. But with dozens of new ways to advertise, tracking what lead is coming from what ad has gotten a lot trickier.

#### **More channels makes marketing effectiveness more difficult to discern**

ClimatePro uses a mix of digital and out-of-home marketing, including Google Business Profile, Yelp, digital ads, and even their trucks in the field to help drive leads. But beyond customer service representatives asking, “How did you find us?” they had no way to track what marketing efforts were driving the most leads.



## THE **NEW** WAY

Just because you're running ads on more channels than ever doesn't mean you can't track the results. You can know whether calls are coming from the paper, the billboard, or even which online ad drove them to call – and every stop they visited along the way.

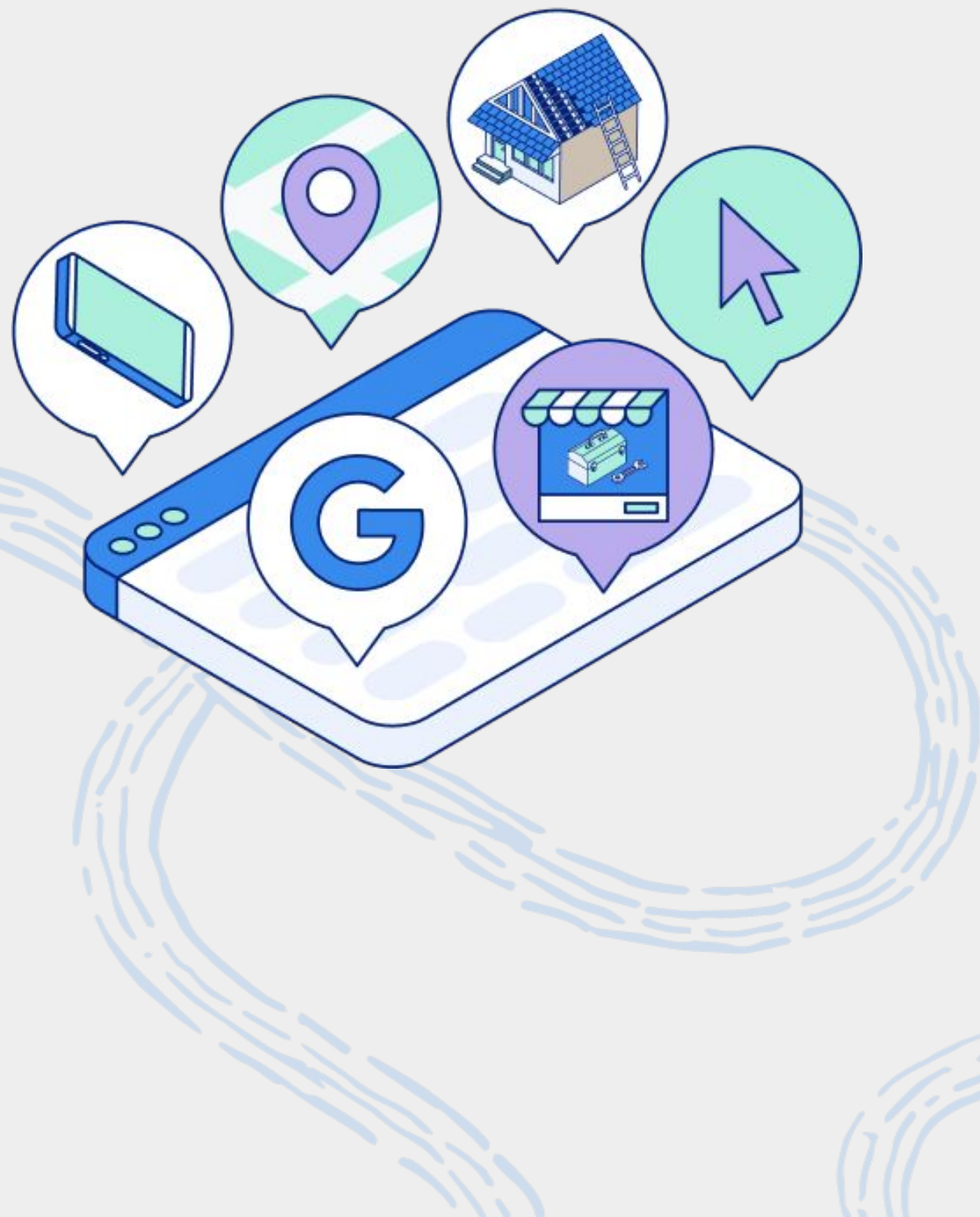
Call Tracking gives you complete visibility into the customer journey. It allows you to use unique numbers to track calls from any advertising campaign, not just out-of-home advertising. And, with Visitor Website Tracking, in addition to single source tracking, you can also see which online ads or pages from your website inspire calls – even if they weren't the last touch point.

### SINGLE SOURCE TRACKING



### WEBSITE VISITOR TRACKING





## IN ACTION

Know how customers find you throughout the customer journey

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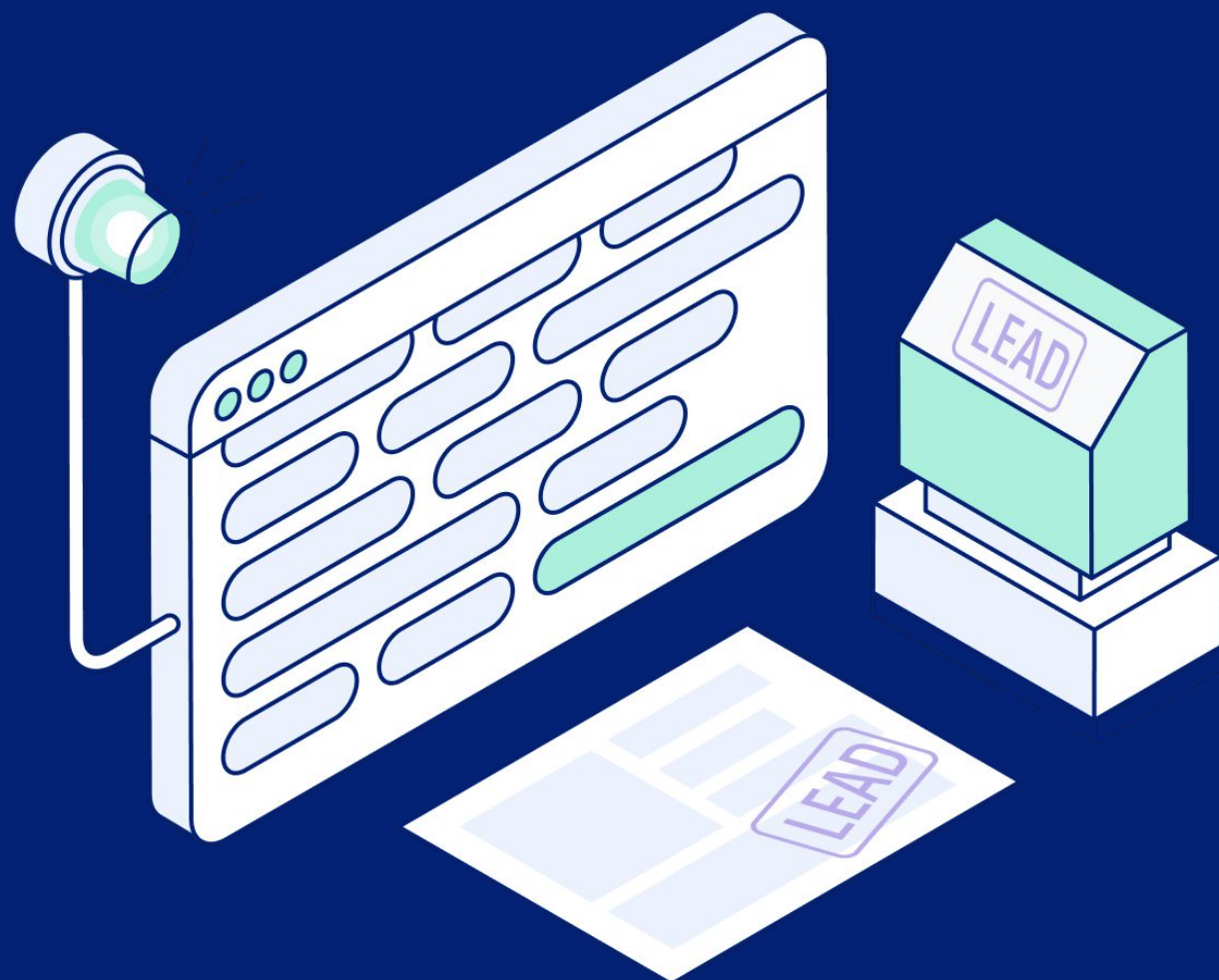
*“With so much of our marketing efforts focused on digital, CallRail gives us the ability to track how our customers find us. That includes everything from digital ads on Google Search and Yelp, even our trucks have different numbers thanks to CallRail.”*

- **Brett Torrey Haynes,**  
Marketing Manager at [ClimatePro](#)

For ClimatePro, unique tracking numbers for each marketing source are crucial to learning how customers find their business. They can quickly and easily see which tracking number a caller used to reach out, then get a bird’s eye view of which marketing sources are performing better than others — and which have the best cost-per-lead ratio.

## Chapter 2

# Analyze phone calls for marketing insights



## THE OLD WAY

In the old days, you would answer a call, maybe scribble some notes in your notepad, hang up – and that was it. Mining any useful information or usable insights – much less patterns at scale – was time-consuming manual labor and virtually impossible for most businesses.

### **You can listen to a call or two, but not at scale**

Nobody has time to listen to every phone call, but every week, John Herrera from [Access Professional Systems](#) takes a moment to listen in on one and always learns something new from customers about the business from their perspective.




# THE NEW WAY

Running a business isn't just about making sales and growing revenue. It's about learning the ins and outs of your customers: their wants and needs, common questions, pain points, dislikes, and overall experience.

AI-powered Conversation Intelligence® makes it easy to quickly mine insights to improve the customer experience, understand customer sentiment at scale, improve sales talk tracks, and optimize marketing and advertising campaigns with keyword spotting of common words and phrases customers use on calls. You can even identify emerging trends and explore opportunities for new lines of business.

Activity

Reports

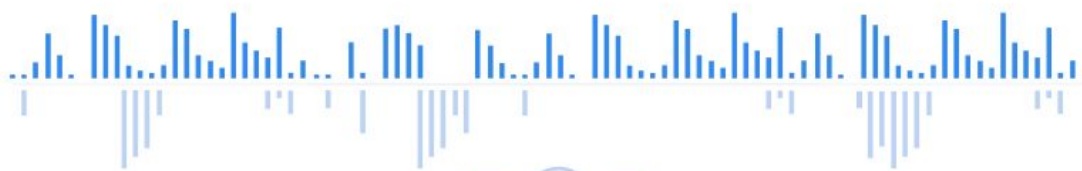


Amy Willis

Amy.Willis@email.com

216-999-0582

Source: [Google Ad](#)



1x

Call Back

View Timeline

Call Summary

Call sentiment: 😊 Positive

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



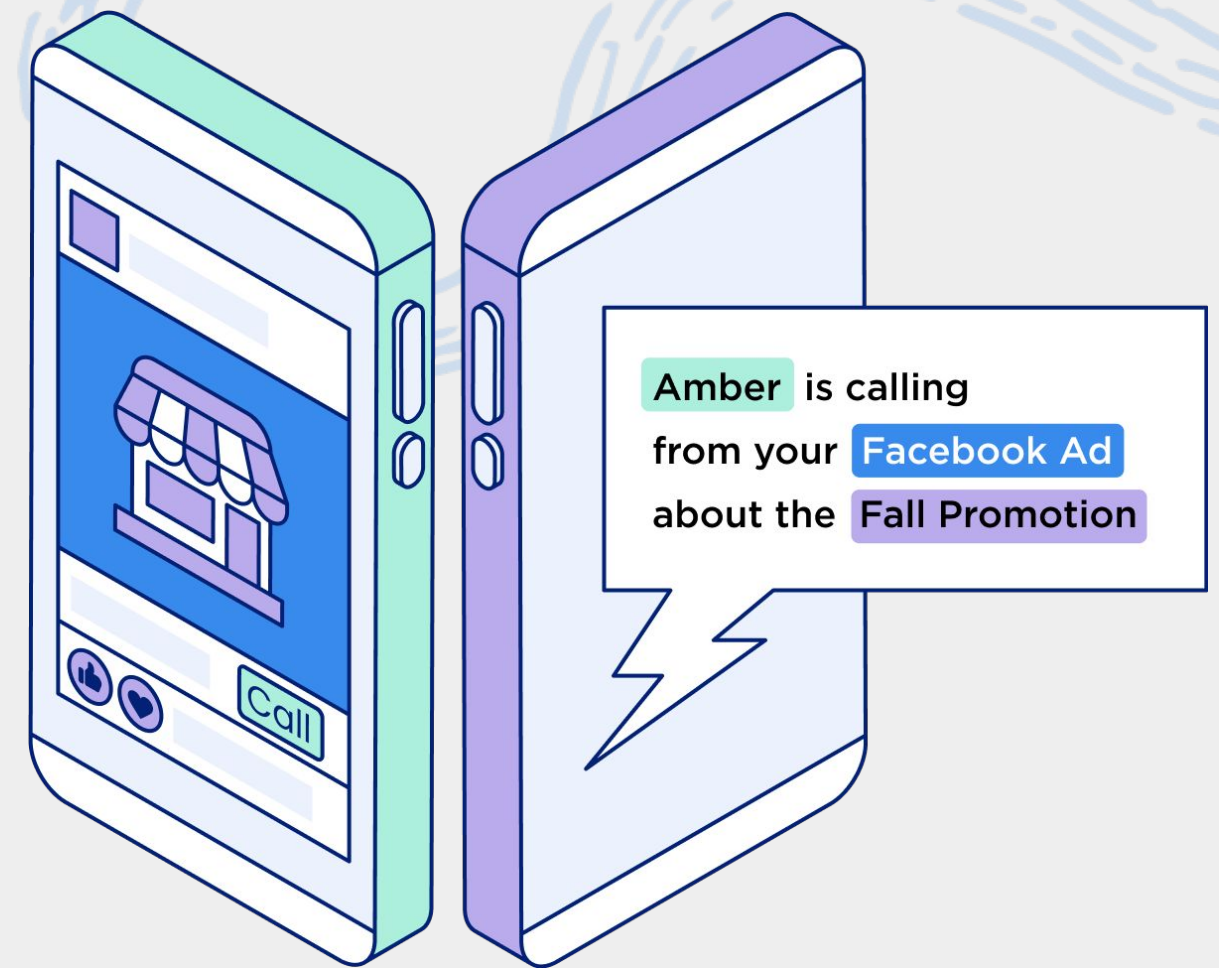
## IN ACTION

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*“There’s just so much value that I think if you don’t see that value — you probably shouldn’t be working in marketing.”*

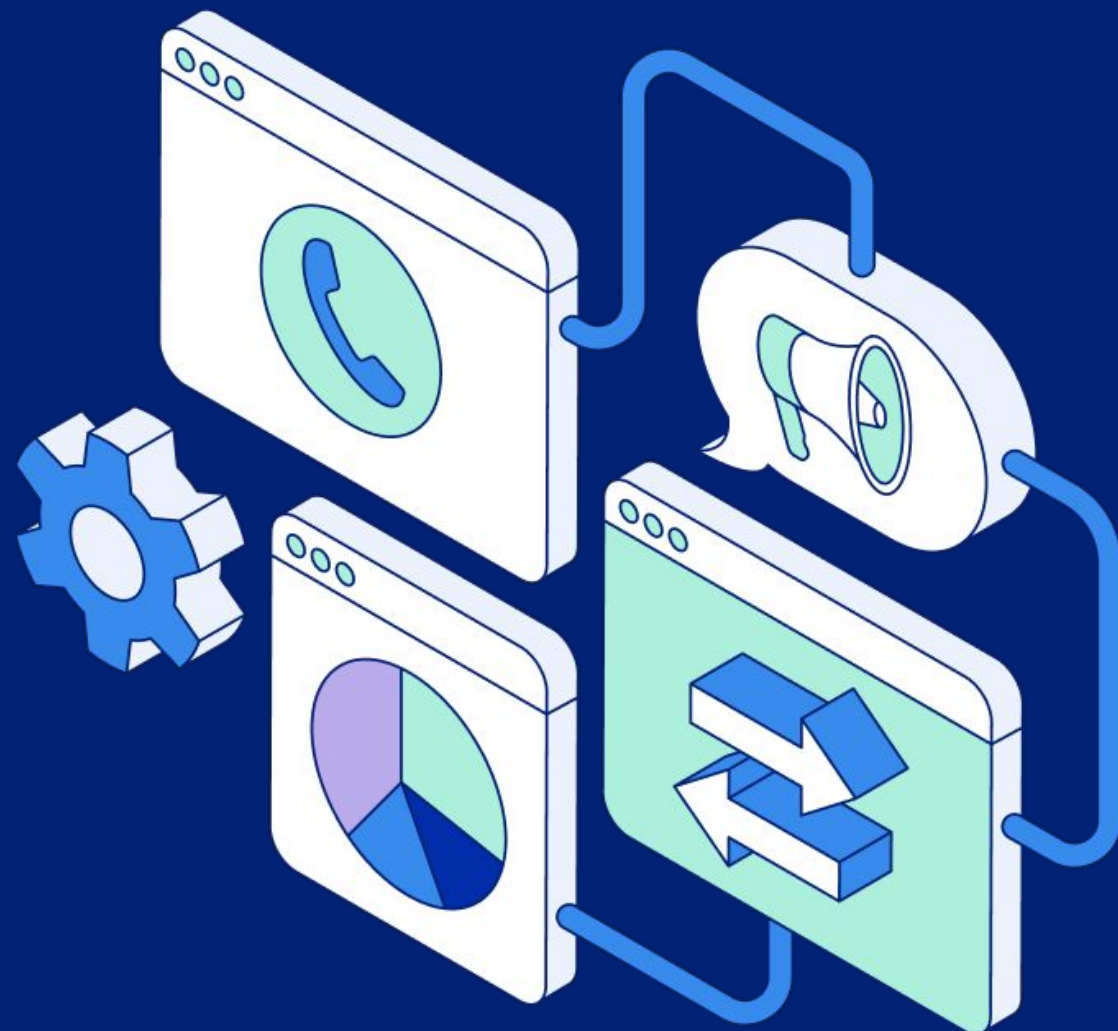
- **John Herrera**  
[Access Professional Systems](#)

With CallRail, Access Professional Systems can tag, listen, and prioritize phone calls. And getting deeper insights from the data is easier and faster because call data is displayed in a clean, simple, chronological, and customizable platform along with details like what browser the customer used, what page they were on, or how long the phone call was. This provides a whole new perspective on how to interpret and use that data to make better business decisions.



## Chapter 3

# Realize improved ad efficiency



## THE OLD WAY

The only thing you knew about a call was that a lead had called. Even if you could track whether Google Ads or other online ads were driving the phone calls – you still didn’t have insight into whether those leads converted. So, you couldn’t determine whether a specific campaign was driving high-quality or low-quality calls and whether your marketing dollars were well-spent.

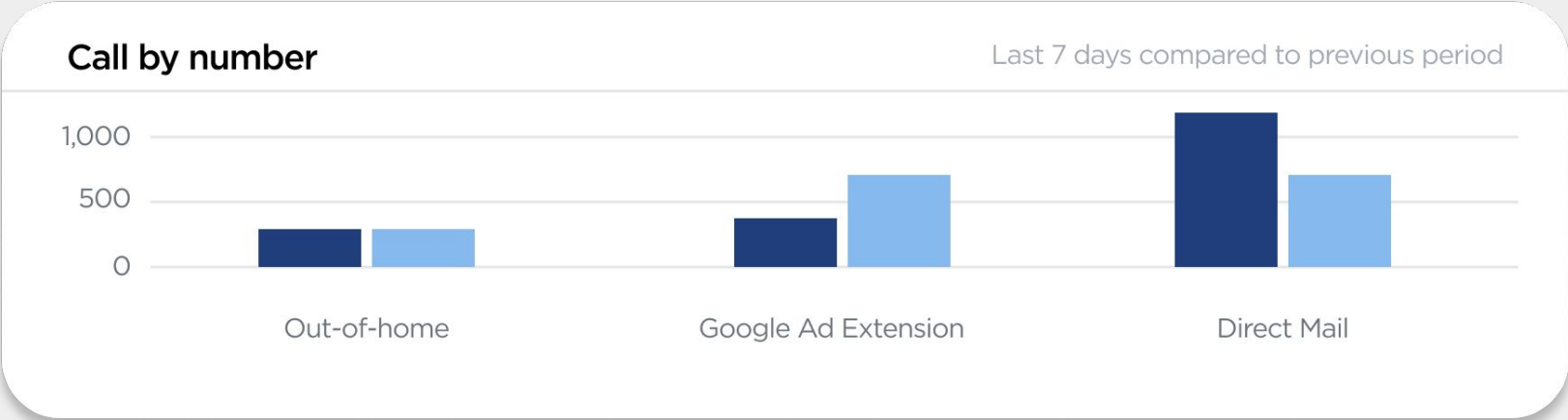
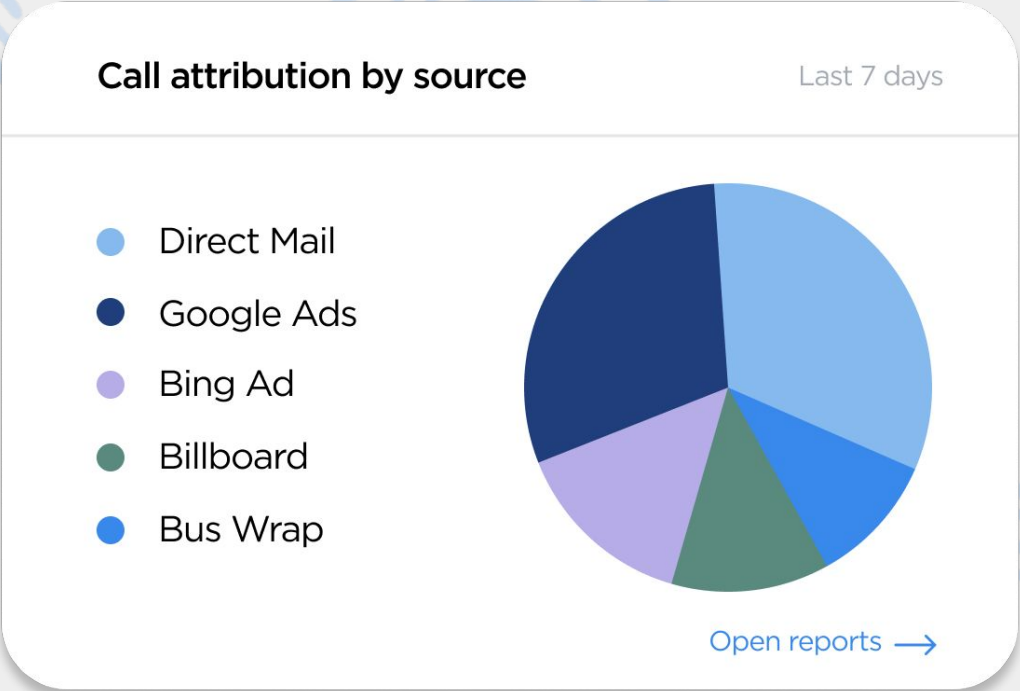
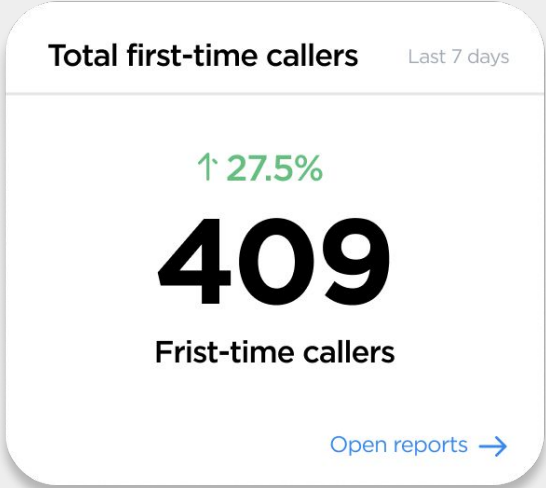
### **Poor quality leads result in high cost-per-lead**

Wit Digital, a digital marketing agency, was driving a high volume of inbound phone calls through its marketing campaigns, but it struggled to qualify those leads efficiently and accurately. Resolving this issue was critical because the company’s cost per lead was sitting well above the industry average.

# THE NEW WAY

Modern AI-powered call analysis, such as Conversation Intelligence, can automatically determine which calls become qualified leads or customers by detecting important keywords in their conversations.

This data can be passed back to Google Ads and other advertising platforms, so both the platform and you know whether campaigns are driving conversions, not just calls. This allows you and the platform to get smarter about what keywords to use to target high-quality leads.





## OUTBOUND RECORDED CALL CLASSIFICATION

Qualified:  Call on May 14

Tags:

Follow Up Call ×

Buyer × +

Listing Provided ×

Value:

\$11,000 +

Notes:

Returned call and provided details on 555 Sycamore St. bungalow

## IN ACTION

New insights drive down cost per lead by 64%

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*“With Conversation Intelligence, I have new insights into what’s working in our campaigns and what’s not. Sometimes even a simple word change can make all the difference.”*

- **Ryan Cook,**  
**Director of Client Strategy at Wit Digital**

Wit Digital has improved lead targeting accuracy by refining their keyword lists based on what they learn from Conversation Intelligence. They are also getting good results with the filter options available in Conversation Intelligence. They are now saving up to \$4,000 per month and have driven down cost per lead by 64%.

## Chapter 4

# Phone calls can happen anytime, anywhere



## THE OLD WAY

It used to be that both customers and businesses could only make or take calls when they were near their landline. People had a more singular focus on the call, and there were fewer distractions or interruptions. You always had your notes on hand to reference past conversations.

### Taking calls from anywhere means more chaos

*“If I look back at what we were doing two years ago, it's actually a little embarrassing.”*

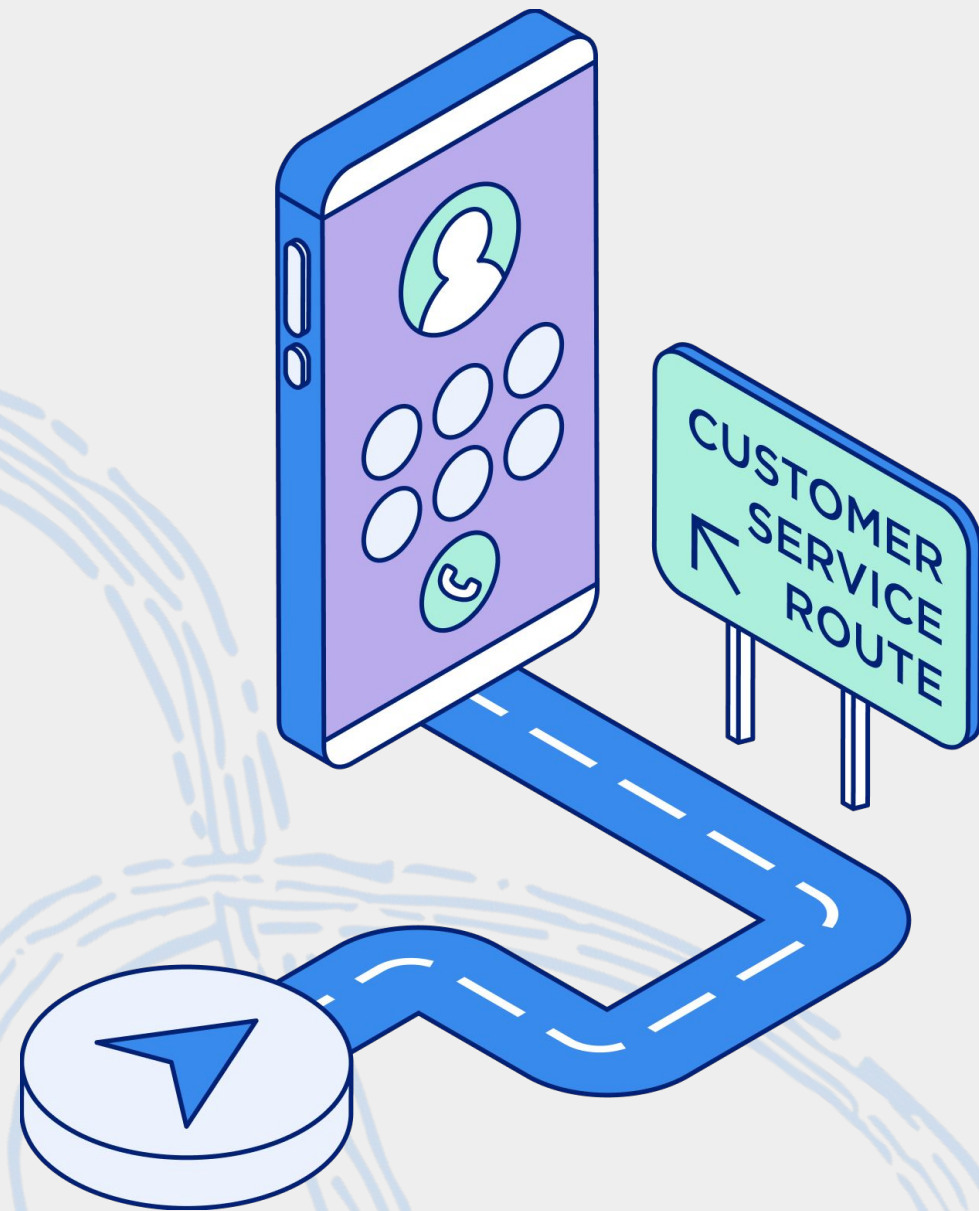
- Joe Taylor, owner of [Toronto Tees](#)

Toronto Tees was getting about 100 calls per day. While they had multiple Vonage phones and multiple cell phones, nothing worked together. This made it hard to keep track of calls, route them correctly, and follow up as needed.

## THE NEW WAY

Customers can make phone calls from anywhere – and in a number of ways. They may use a voice assistant like Siri or talk-to-text feature, reach out while driving, or multitask. As a business, you need to be able to take inquiries however they come – phone or text – and be able to follow up with quotes, links, images, etc.

By adding Lead Center to Call Tracking, not only can your representatives take calls from anywhere, you can also track and return calls so no calls are missed. Lead Center also provides customer histories so your reps always have notes and other customer milestones at their fingertips. This allows great customer service to happen anywhere.





## IN ACTION

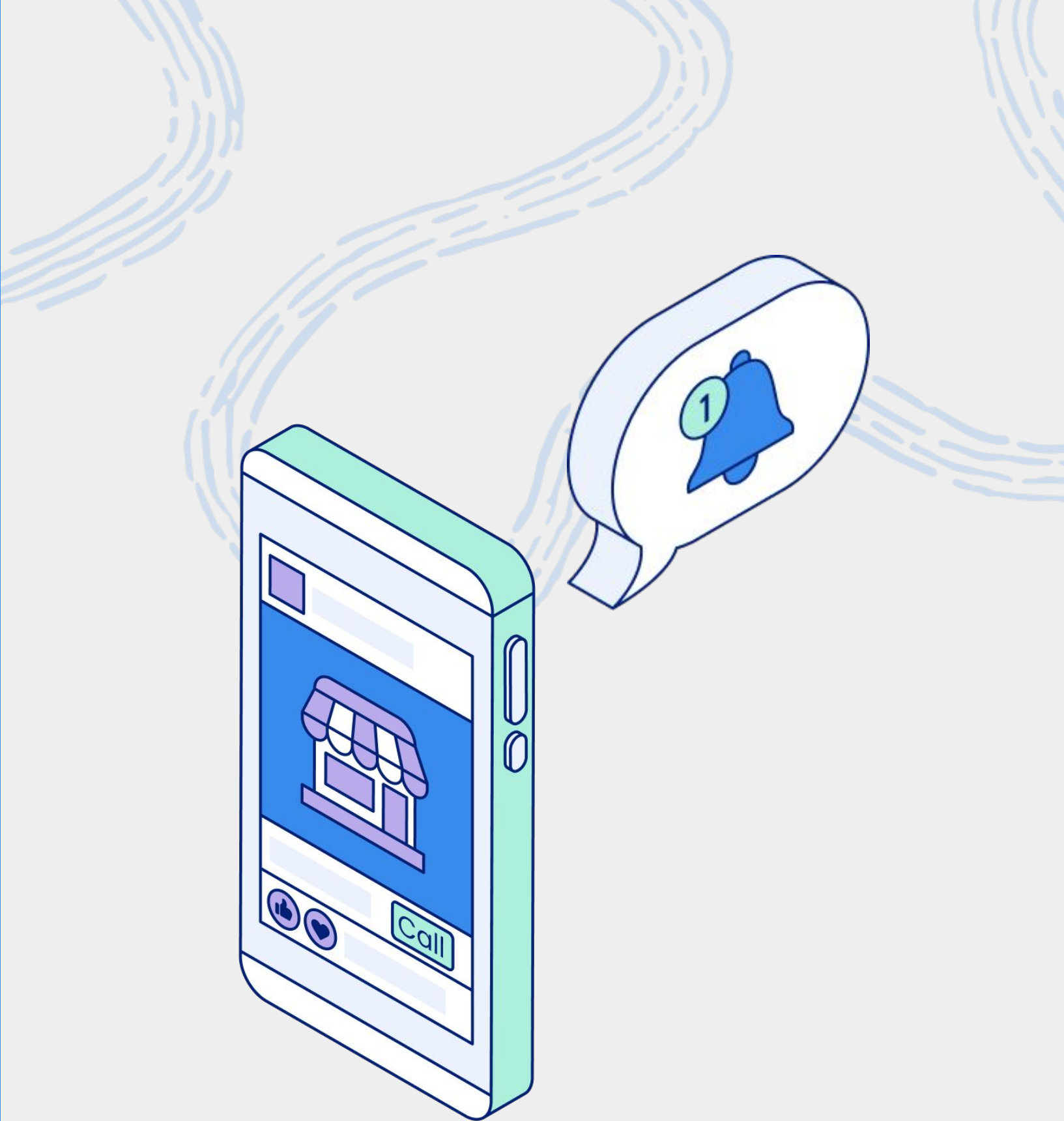
Communicate with customers how they want  
and when they want

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*“The best thing CallRail has done for us is — if you call my business outside of our hours or there's a line in the store and no one can get to the call, we have it set up to send a follow-up text message. So it says, ‘Hey, we're really sorry we missed your call. We'd love to get in touch today.’ And the amount of people that reply to that text or call back later is huge.”*

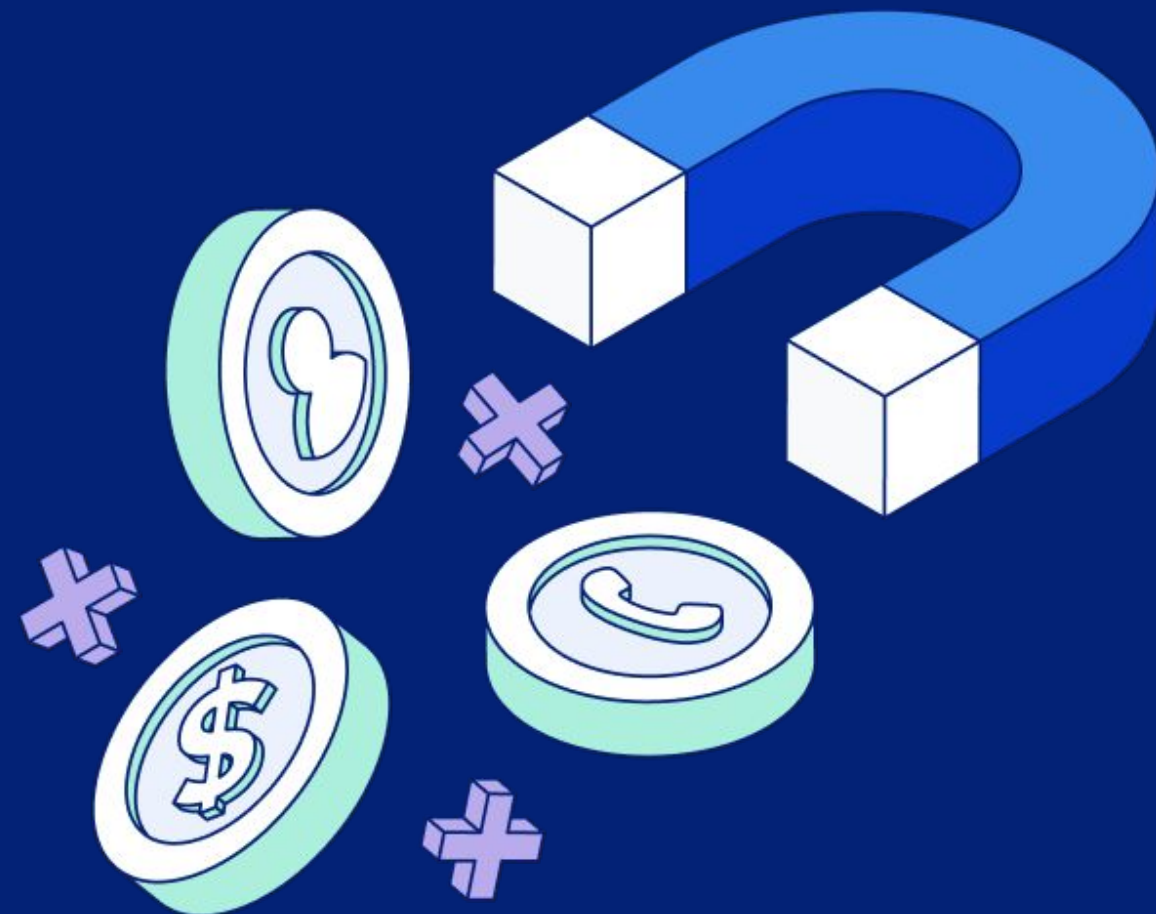
- *Joe Taylor, owner of [Toronto Tees](#)*

After implementing CallRail's Lead Center as their business communications solution, Toronto Tees estimates they convert 10% more of their leads because they now have a system set up to track all calls and follow up.



## Chapter 5

# Phone calls are increasingly high value



## THE OLD WAY

Before online self-service became the standard, everyone used the phone. The tire-kickers were just as likely to call your business and ask a million questions as a hot lead. And often, it was hard to know who was who. Your team would often be tied up answering questions from someone who never planned to buy while the person ready to slap down their cash was sitting on hold – growing into a colder and colder lead.

### Missed calls equal missed lead opportunities

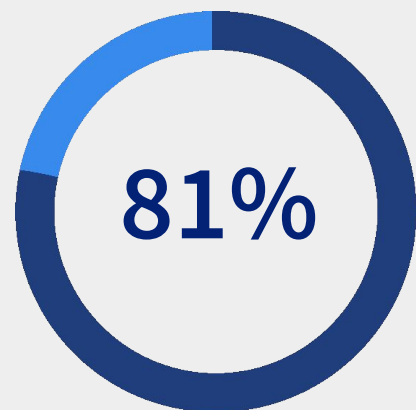
*"We had 1,500 missed calls in one year alone. It's almost a missed call every hour. It's a pretty significant amount of leads that previously we weren't able to call back."*

- **Chris Berg**, [Screen Medic](#)

For Screen Medic, a Minnesota-based screen repair company, when calls didn't get answered right away, they usually didn't get a callback at all because there was no system to track and return missed calls.

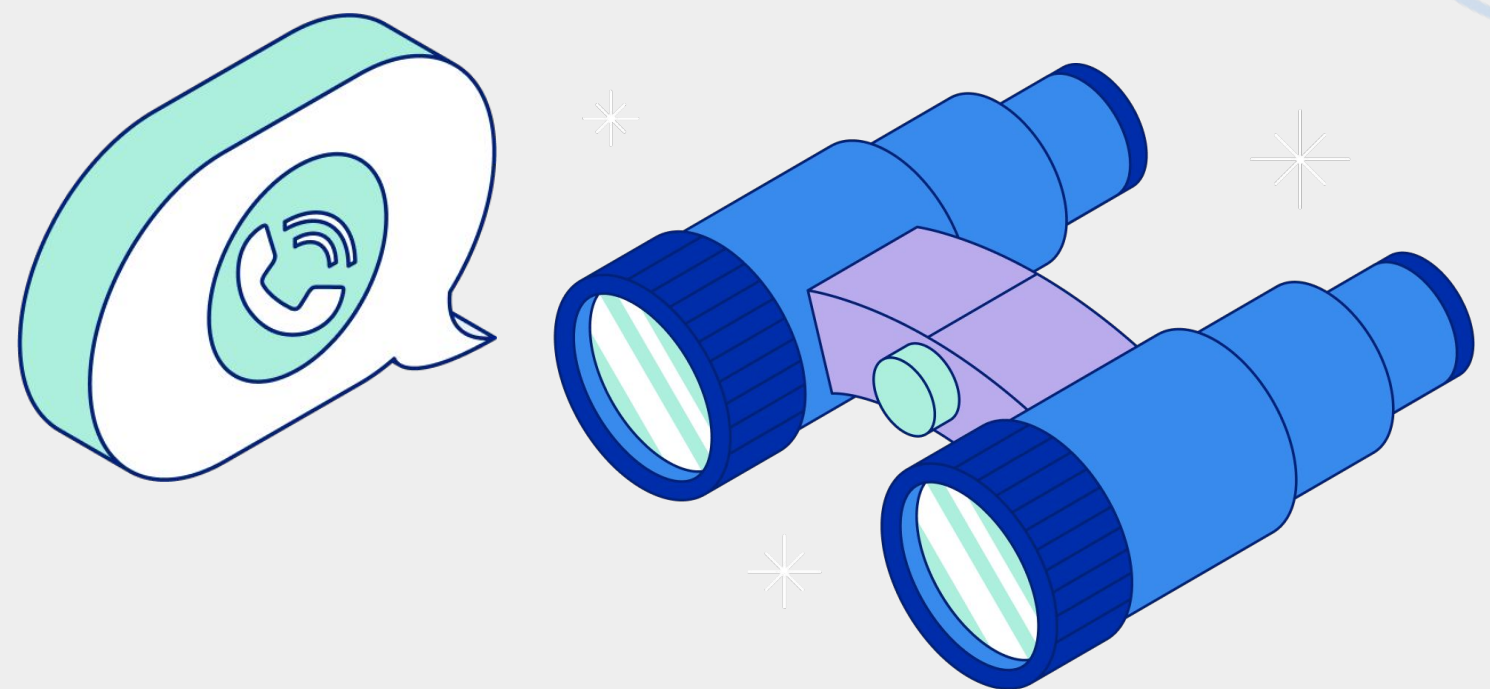
## THE NEW WAY

Now that everyone can self-serve – most do.



In fact, 81% of consumers say they go online to research before reaching out to a business.

By the time someone picks up the phone and calls your business, they've already done their research and are ready to move forward. This means phone calls are the hottest leads you've got and should be treated as such.







## IN ACTION

From 1,500 missed calls to zero missed calls

”

*"We're able to just pick up and go without a long, laborious process of pulling up the customer's file, looking at a coworker's sticky notes, etc."*

- Chris Berg, [Screen Medic](#)

By implementing [CallRail's Lead Center](#), Screen Medic has not only stopped missing calls but has been able to provide better service to those calling. Lead Center keeps a history of all missed calls so the team can see what calls still need to be returned and follow up promptly.

## Chapter 6

# Improved customer experience



## THE OLD WAY

People used to call a desk phone to get in touch. Businesses would use extension lines to route the call to the correct person. But if someone wasn't at their desk, it just went to voicemail or calls were missed.

**Businesses have no idea calls are being missed**

*“One client was missing around one-third of their calls.”*

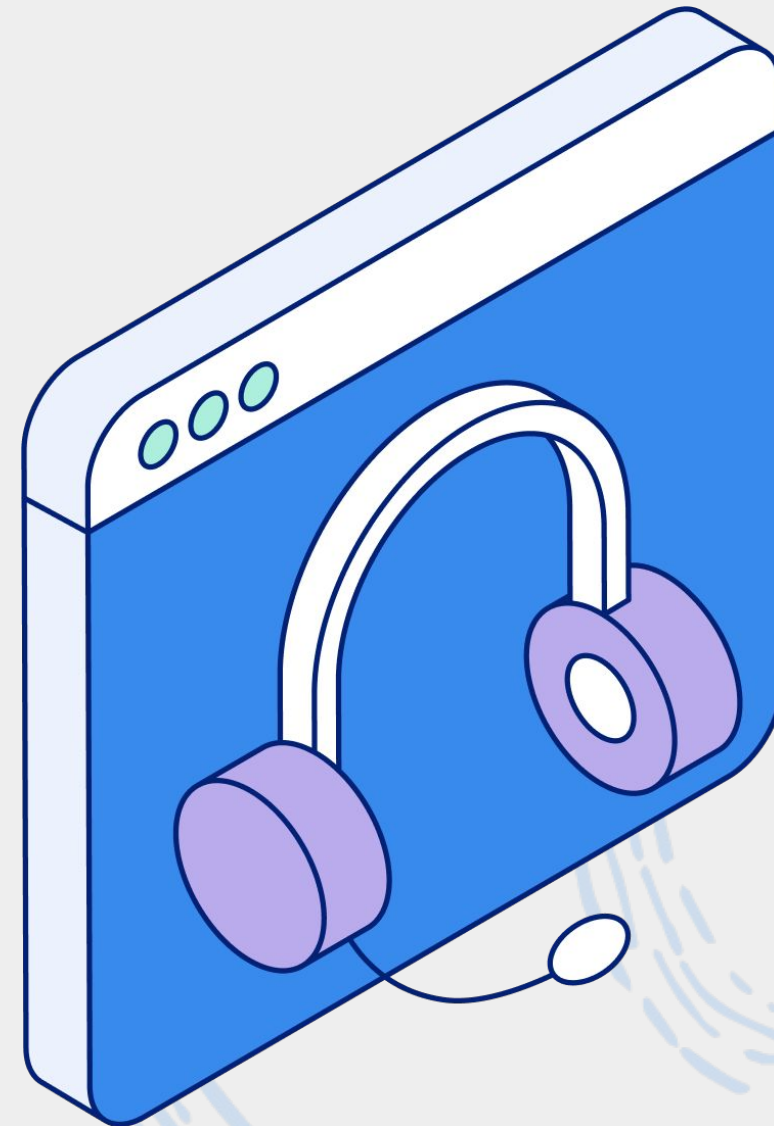
- *George Gavalas,  
head of digital marketing at [Bonfire](#)*

Bonfire, a full-service digital marketing agency, found that their clients often have no idea that missed calls are even happening in the first place since they're not being tracked.

## THE NEW WAY

With CallRail's [Call Flow Builder](#), you have the ability to design a call routing system that looks after your callers as soon as they connect to your tracking number. You can include a custom greeting instructing them on navigating your call flow or an interactive menu to ensure that the correct sales representative will answer a lead's call.

You can also combine CallRail with a [virtual receptionist \(VR\)](#) to ensure you answer every call with ease while keeping overhead low, improving the customer experience, productivity, and ROI. For first-time callers, your VR can ask the needed intake questions and manage the next steps so your team isn't bogged down – and can focus on high-impact tasks like closing your hottest leads.





## IN ACTION

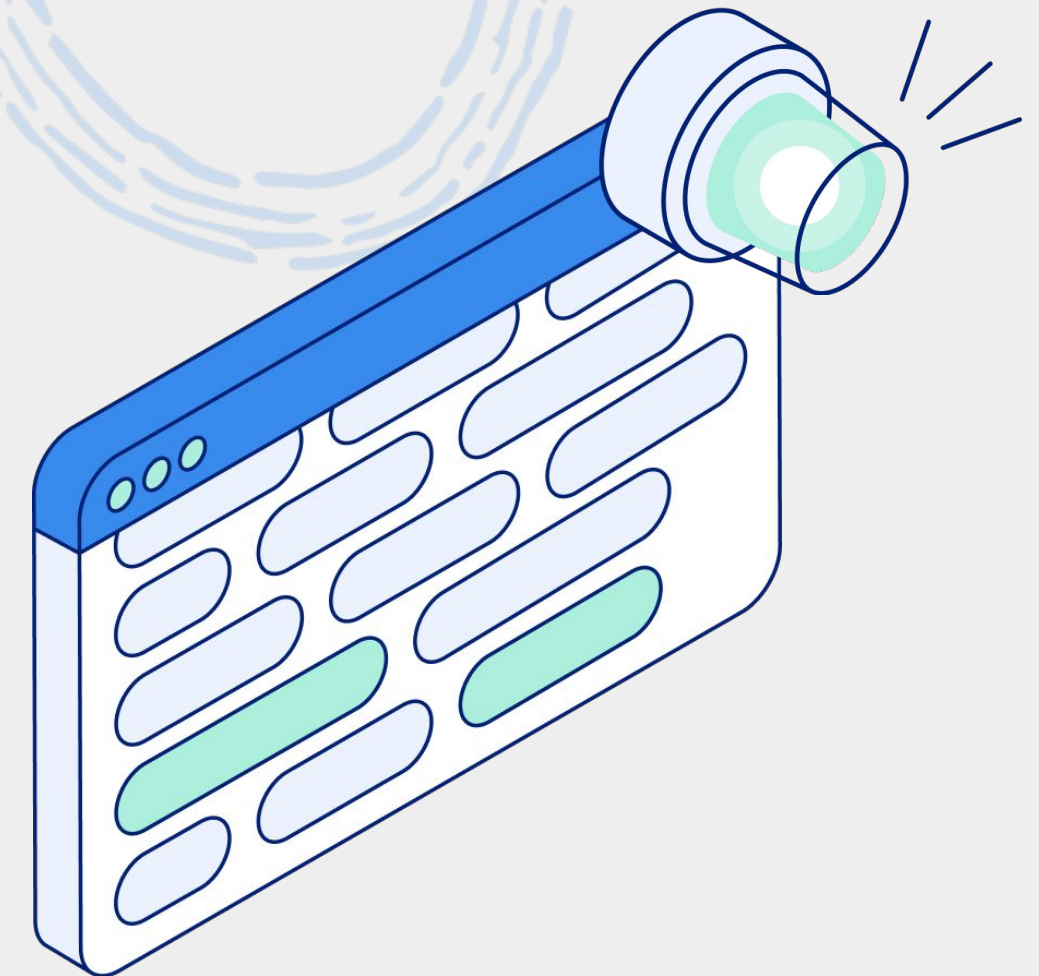
### Missed calls become a thing of the past

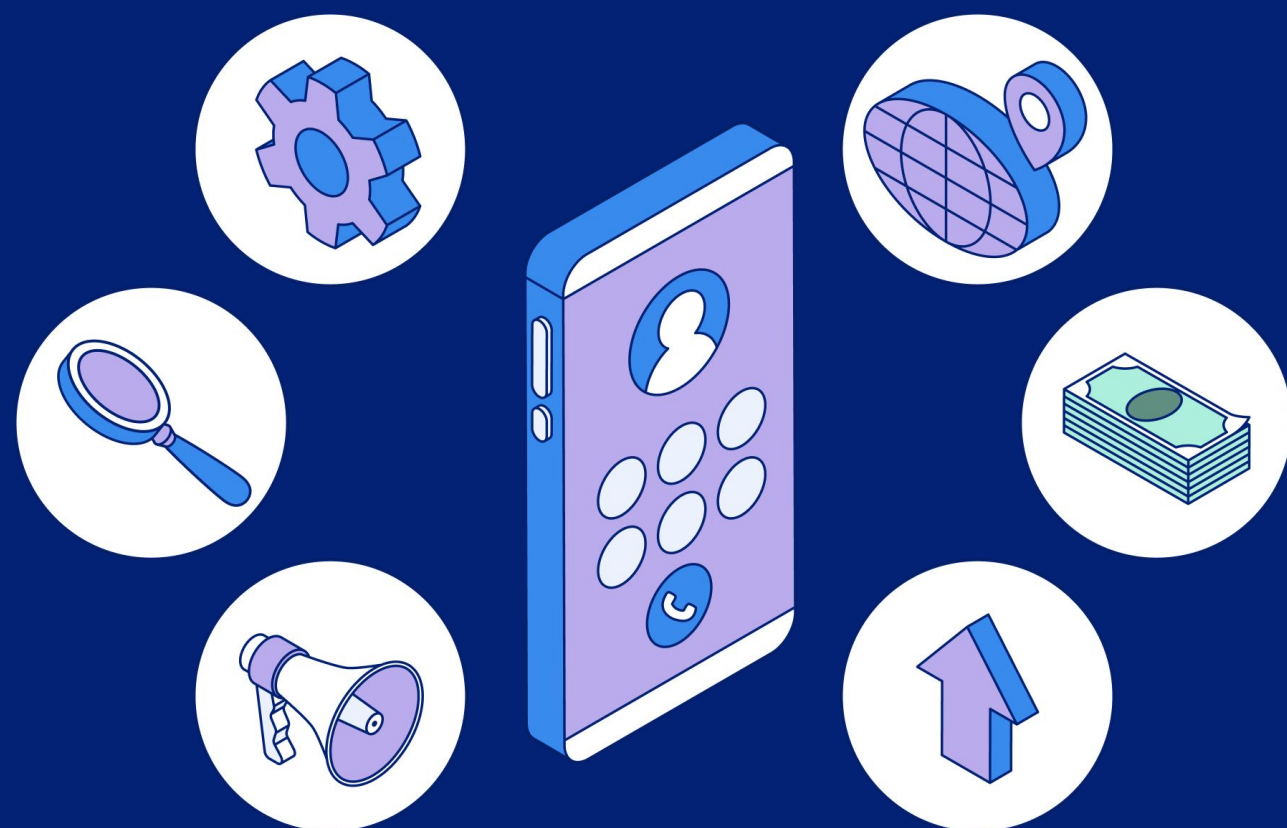
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*“Without CallRail, say you get a call at 9:00 pm at night and no one answers — you might not ever realize the call even took place. With Call Tracking, not only do you have the opportunity to answer the call, you can even [see what keyword drove the call](#) and gauge how valuable the call might be just from that.”*

- **Rafe Malach,**  
co-founder of [Lawyer Connection](#)

Lawyer Connection and their clients use CallRail to set [custom call flows and routing](#) based on factors like time of day and location or even which Google ad the lead is calling from. This allows you to route calls to the right person or even a virtual assistant who can take care of next steps, like scheduling a consultation.





CallRail

# Make call data a valuable part of your business strategy.

Try CallRail free for 14 days and capture more leads, see improved marketing results, and get insights to grow your business.

[Sign up for CallRail](#)