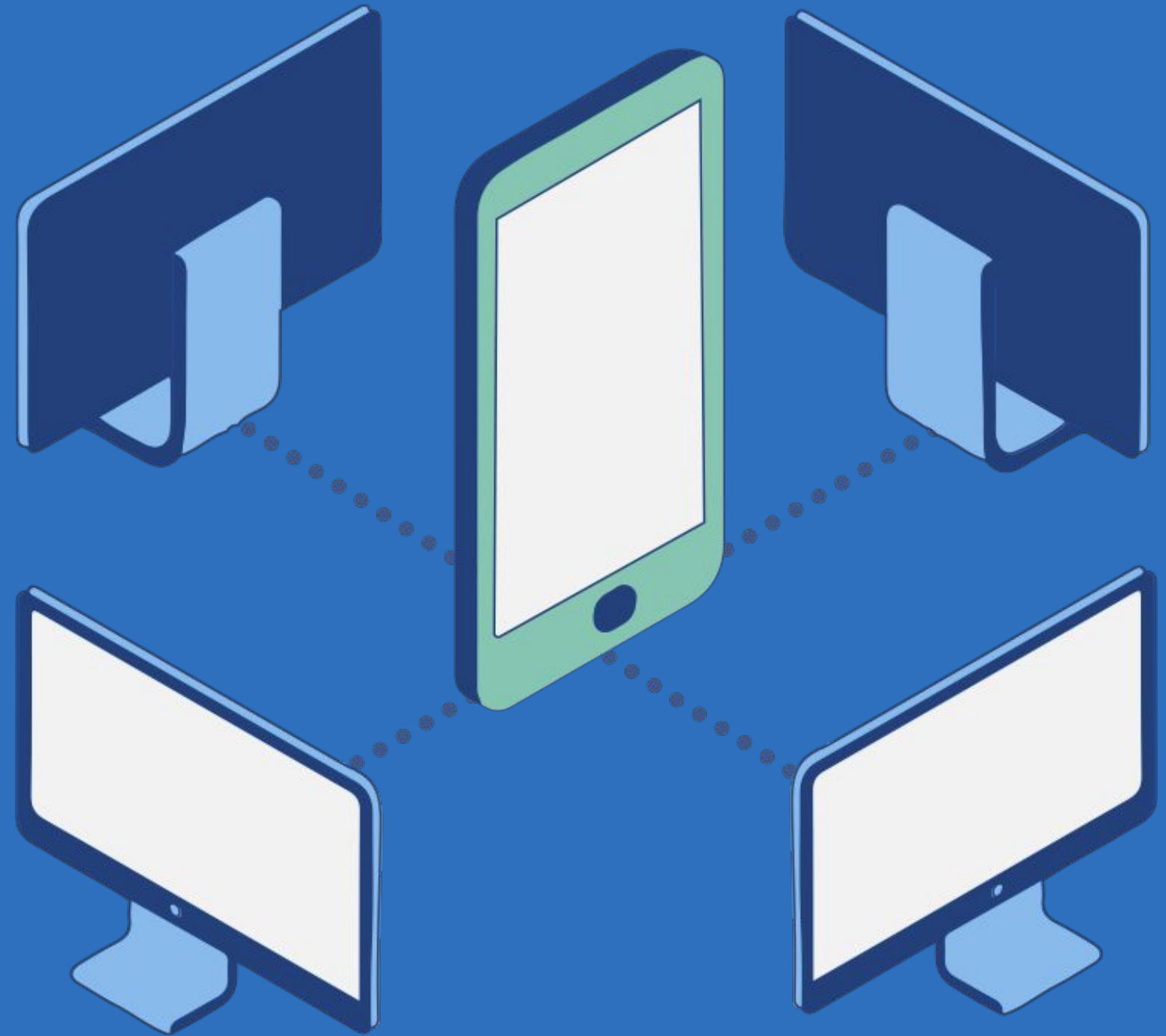


CallRail

Call Tracking 101

# The beginner's guide to call tracking



## TABLE OF CONTENTS

What is call tracking?	2
The importance of tracking inbound calls	3
How call tracking works	4
How to choose a call tracking provider	8
6 real-life call tracking success stories	11

## What is call tracking?

Have you ever asked a caller, “How did you hear about our law firm?” With [call tracking software](#), you’ll know the answer before you even pick up the phone.

Call tracking enables you to [attribute phone calls](#) into your law firm to the specific ad, campaign, or keyword that led those people to pick up the phone. When you know which advertising campaigns make your phone ring, you can better measure their success — and optimize your marketing strategy to improve your return on investment (ROI). Without that level of attribution, you are flying completely blind.



## The importance of tracking inbound calls

When you invest in call tracking software, your marketing performance reaps the benefits. You'll have the ability to:

- Attribute inbound phone calls to the right marketing campaigns
- Measure online and offline marketing campaign performance
- Understand which keywords are generating leads
- Improve customer experience

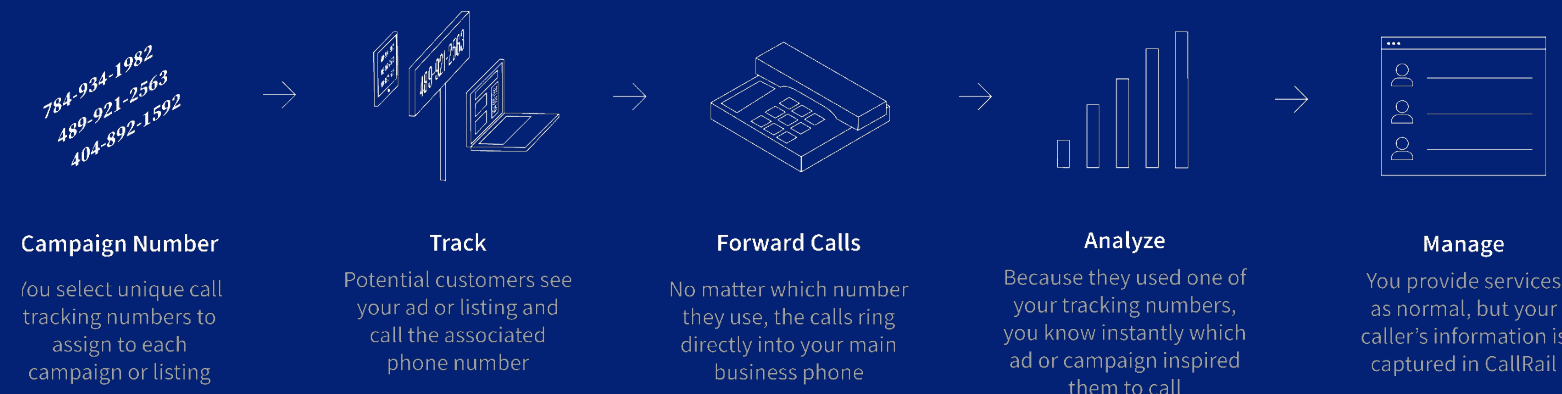


# How call tracking works

At its most basic level, call tracking is pretty simple: it assigns a unique phone number for each marketing campaign — whether it's digital or real-world — and calls to that number are tracked and forwarded to your main phone line. This most basic version is known as “source-level tracking”.

A more advanced type of call tracking known as “visitor-level tracking” works by using cookies and [dynamic number insertion \(DNI\)](#) to track online activity and to assign each offline marketing piece its own phone number.

## Source-level call tracking



## How Annie's Automotive uses call tracking

Annie is the owner of Annie's Automotive, a shop located in Atlanta, Georgia, which specializes in European car repair. Like all auto repair shops, phone calls are an important part of her business. Her current and potential customers call the shop to schedule appointments, ask questions, and request quotes or other information over the phone.

Annie has a small marketing budget and she isn't sure she's getting a good return on her investment. She's noticed her business isn't doing as well as some of her larger, more established competitors.

### Annie's marketing channels include:

- Facebook ads
- Paid search
- Ads in the local newspaper

To get to the bottom of things, Annie decides to try call tracking to get a better sense of what's working — and not working — with her marketing.



### Attribution and analytics

Before call tracking, Annie used the same phone number for all of her marketing efforts. After adding call tracking, she uses different numbers for all three channels and another for her company website.

After his first month of tracking calls, here's what she found:

Tactic	Tracking number	Results	Total cost	Cost per acquisition
Facebook ads	444-1222	27	\$600	\$22.22
Paid search	444-1333	56	\$800	\$14.29
Newspaper ad	444-1444	7	\$1000	\$142.86
Organic search	444-1555	3	n/a	n/a

### Based on this information, Annie now knows four things:

1. Paid search is her most successful and cost-effective channel
2. Facebook ads are expensive and don't yield as many calls as paid search
3. Her newspaper ads have a very high cost per acquisition
4. Her website doesn't generate many phone calls

Since paid search is the most lucrative channel, Annie decides to see if she can optimize her ads to get an even better ROI. She uses two different call tracking numbers to run an A/B test on her ad copy.

Ad #1 uses "Experts in European auto repair," and ad #2 uses "Atlanta's European auto repair experts." After running the ads for a few weeks, Annie looks at the results.

Ad #1 generated 34 clicks, 13 calls, and 4 appointments.

Ad #2 generated 22 clicks, 39 calls, and 12 appointments.

If she only measured by clicks, ad #1 would be the clear winner. But with call tracking, she can see that clicks alone don't give her a complete picture of her marketing results. Ad #2, which had significantly fewer clicks, generated more than three times as many calls, because customers were dialing the phone immediately after seeing the ads on their Google search results page.

**Using what she learned from call tracking, Annie makes the following changes to improve her marketing ROI:**

- Incorporates the word "Atlanta" into her ad copy to improve her local search presence
- Cancels her newspaper ads in favor of putting that money toward paid search
- Updates her Facebook ad targeting and messaging to improve results
- Updates her website copy and added new blog posts to generate more organic traffic

Call tracking helps Annie's Automotive generate more leads for less money, but that's just the beginning. Once someone picks up the phone to call Annie's shop, there are more insights to be gained — that's where conversation intelligence comes in.





## Conversation Intelligence

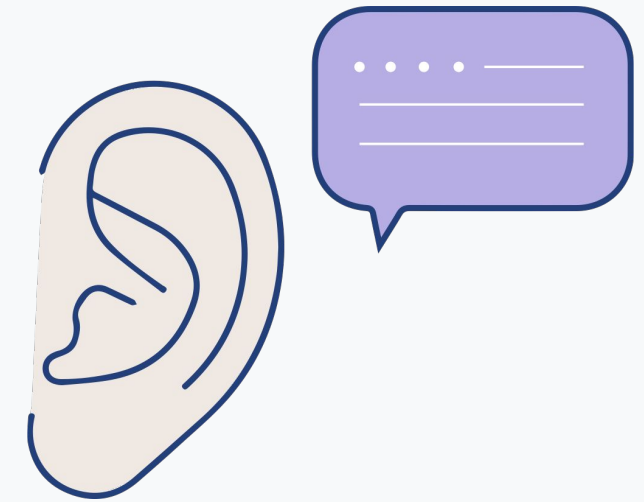
CallRail's Conversation Intelligence uses artificial intelligence (AI) to pull the information most valuable to you from your phone calls.

In addition to automated recordings and transcriptions of your calls, conversation intelligence gives you automation rules: You choose the words and phrases you want to listen for, and automation rules highlight them every time they're spoken.

For example, you might want to note any time someone mentions the word "consultation" so you can be sure they get a follow-up call. Or you might want to highlight a specific service you offer to see how many people are calling about that item.

Let's go back to Annie's Automotive. Say Annie made the changes mentioned in the last section based on the data in her call tracking dashboard. But even after making the changes and seeing an increase in the number of calls she receives, there hasn't been a corresponding uptick in new customers.

Annie uses conversation intelligence to get to the bottom of things. She listens to several call recordings to hear what her customers are saying. Lo and behold, Annie quickly realizes her receptionist's European car knowledge isn't quite up to par, leaving potential customers confused, frustrated, and ready to call one of her competitors.



She also notices a trend of potential customers asking questions about Volvos specifically. Annie doesn't mention Volvo much on her website because she assumed it wasn't popular in Atlanta — but her conversation intelligence data suggests otherwise.

If call attribution and analytics tell you the "what," conversation intelligence tells you the "why." Together, call tracking and conversation intelligence are effective tools for businesses and the marketing agencies that support them. It helps businesses to not only make smarter marketing decisions but to make better decisions about customer support, business development, service offerings, and more.

Now that you understand how call tracking works, you'll want to choose a provider that meets your needs and budget.

# How to choose a call tracking provider

When choosing inbound call tracking and conversion reporting tools, there are dozens of companies that claim to offer top-tier services. When you look at your choices, start with a basic question: Which platform fits best with your company's goals and the path it needs to take to reach them?





While all call tracking software has standard requirements to fit into the category, you should look at several key differentiators when evaluating your options:



Price



User ratings



User interface



Call routing features



Call recording & conversation intelligence features



Spam detection



Ease and sophistication of reporting



Client fit (for agencies)

To determine which call tracking features are most relevant to your business, identify your biggest pain point when it comes to inbound phone calls. One call tracking service may include a feature that helps you address that pain point while another doesn't.

If your biggest concern, for example, is identifying what marketing campaign or channel is bringing in the best leads, attribution reporting and conversation tracking should be a major consideration.



On the other hand, if call data isn't as important to you today as routing calls to the right person at the right time, you may want to prioritize [call routing](#) and user interface.

Or maybe you need both inbound and outbound call tracking capabilities? Meaning, whether calls are coming into or out of your practice, your firm has a complete interaction timeline starting from the campaigns and keywords that generated a particular lead to each and every inbound and outbound call that took place along the prospective client's journey with your firm.

In order to make shopping around easier, come prepared to ask your prospective call tracking provider the following questions:

## What features are standard?

Call tracking providers share some features, but there can be a big difference in how much they charge for those features. For example, one provider may charge more per minute for call transcription if you're on their standard plan, while others may have a set rate for smaller plans and a discount for larger plans.

## What is your monthly rate and rate per minute?

All call tracking providers charge a monthly rate that depends on the size of the plan you buy. More expensive plans typically include integrations with other software providers and other advanced features that are excluded from lower-tiered plans.

It's extremely important to keep in mind that not all call tracking providers include minutes in their plans. For example, one provider may include 500 minutes in a plan, while another doesn't include any and charges solely based on usage.

This is crucial when selecting a call tracking provider that fits your budget. Depending on your needs and usage, a company's [pricing and packaging](#) can have you overspending for things you don't need or use. Remember Rudy's Law Firm—Rudy needs to keep his fixed costs as low as possible while receiving the maximum number of minutes and numbers he can get with his budget.

## Do you integrate with other tools in my tech stack?

In order to have the fullest marketing attribution picture possible, it's wise to connect your call tracking tool with other important marketing tools for law firms, such as Google Ads, Google Analytics and HubSpot. Make sure your call tracking provider [integrates with the tools you use](#) (or may use in the future), and ask which pricing tiers include the integrations you need. Some call tracking platforms even integrate with legal-specific CRM software like Lead Docket or practice management software like Clio.

Now let's take a look at some real-life examples of companies like yours that used call tracking to improve their ROI.

## Can you accommodate all of my campaign types?

Chances are your business uses more than one marketing channel, including digital (like paid search) and offline (like direct mail). Make sure your call tracking provider can accommodate not only your current needs but also scale with your business as you grow.





## 6 real-life call tracking success stories

No matter your industry, business size, or level of marketing experience, call tracking can make a massive difference in your ROI. Here are six use cases that demonstrate how call tracking can drive real results for real companies.



## Chameleon Window Restoration: Lowering ad spend, growing revenue

Like many home service companies, the majority of Chameleon Window Restoration's new business comes in through phone calls. The UK-based team was recording call details by entering them manually into a spreadsheet but didn't know how to attribute them to their advertising.

Now Chameleon uses CallRail's Call Tracking to automatically record calls, which saves time and reduces human error that can be caused by manual transcription. And thanks to the insights gained, they expect to save £10-20k (\$14k-28k U.S.) on their advertising budget and generate an extra £50-80k (\$70k-112k) in revenue.

[Read the full case study here.](#)

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## Wit Digital: Improving results for their clients

Wit Digital's digital marketing campaigns were driving a lot of calls for their clients, but the agency was having trouble qualifying those leads properly. So the team sent the calls recorded through Call Tracking to an overseas transcription service, which cost up to \$4,000 a month. Unfortunately, what they got back was only 65-75% accurate.

They decided to try Conversation Intelligence and haven't looked back. Now they're saving \$4,000 per month and refining their keyword lists using the insights they gain to drive down their clients' cost per lead by 64%.

[Read the full case study here.](#)

“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.”

## JC Law: Saving thousands and increasing client retention

The team at the Law Offices of James E. Crawford, Jr. and Associates, LLC couldn't get a clear picture of how many of their leads were converting — or how many leads their ads were even generating in the first place.

After implementing HubSpot and integrating it with CallRail, the team learned they were wasting tens of thousands of dollars on ineffective advertising. They decided to change up their strategy to focus more on organic leads and client retention.

Based on CallRail's data and Hubspot's automation, the law firm lowered their ad spend by 20% and increased retained cases by 61% in just two months.

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## Einstein Industries: Understanding the customer journey

San Diego-based marketing agency Einstein Industries helps its clients attract business with search engine marketing (SEM). The dental and medical practices they serve have a long sales cycle, where customers spend months — even years — researching before committing to a costly procedure.

With CallRail's timeline feature, Einstein helps their clients identify every step of the customer journey, from their first interaction up to making the appointment and make better marketing decisions based on real data.

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## Workspace Strategies: Boosting ROI with new insights

Shared-workspace management and consulting firm Workspace Strategies was getting some idea of their marketing results through Google Analytics but had no way to track the source of leads that came in by phone. And when occupancy rates dropped because of COVID-19, getting the best possible ROI became an urgent matter.

With Call Tracking, Workspace Strategies was able to quickly identify which channels were underperforming and move their marketing budget to other, more lucrative, channels. They've also incorporated what they've learned through listening to their tracked calls into their sales training. As a result, CallRail is paying for itself – times 20.

[Read the full case study here.](#)

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## Access Professional Systems: Gaining new perspective

Access Professional Systems already understood the importance of tracking their leads when they engaged with CallRail. What surprised them was just how much they were able to learn about their customers — through both their dashboard data and listening to their calls.

Within 24 hours of implementing Call Tracking, Access Professional Systems saw value in the platform. Today, they're using the deep insights they gain about their callers to make better decisions about their business.

[Read the full case study here.](#)

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CallRail

Ready to get started  
with call tracking?

Start your free trial today

