

# The CallRail Integrations Playbook

Connect your tools and let the data do the work

Your marketing data doesn't live in one place. Clicks are in Google Ads, leads are in your CRM, and calls are tracked separately from all of it. Getting a clear picture of what's working means manually pulling data together.

CallRail sits at the center of your marketing stack, connecting the tools you already use so data moves between the automatically. Set it, forget it, and trust it — each integration runs in the background with no maintenance, no manual syncing, and no chasing data across platforms.

With 15 years of reliability behind every connection, you can trust your stack to handle the heavy lifting while you focus on strategy.

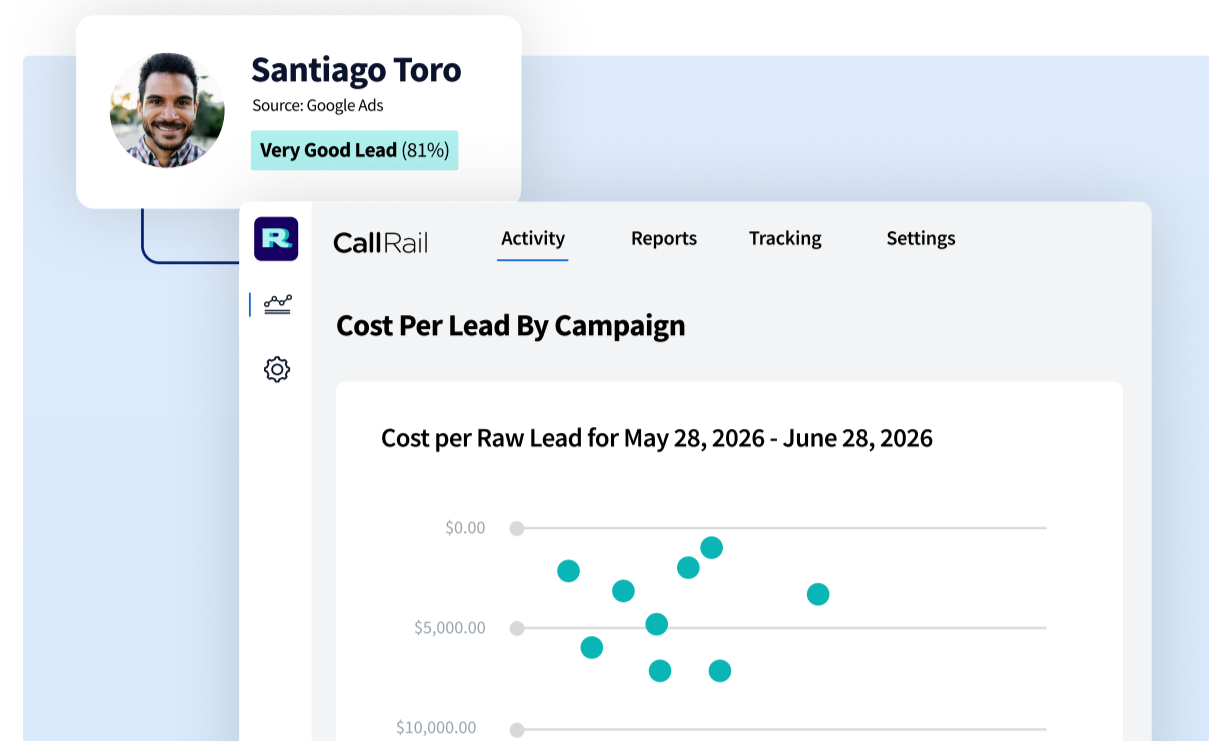
Here's what each one does.

PLAY 1



## Stop bidding on clicks and start bidding on leads

Most Google Ads campaigns are set up to chase clicks. Without a way to send call and form fill data back to Google, you're giving automated bidding an incomplete picture — and your budget reflects that.



CallRail's [Google Ads integration](#) tracks every call, text, and form fill generated by your campaigns and automatically sends that conversion data back to Google. This gives automated bidding and Performance Max a clearer picture of what's converting, so your budget goes toward the campaigns and keywords driving your best leads.

You can also pull source, campaign, ad group, keyword-level, and conversion data into CallRail to see exactly which searches are driving your most valuable callers. If you're using [Form Tracking](#), you can pull ad spend data directly from Google Ads to calculate cost per lead without doing extra work.

### What you gain

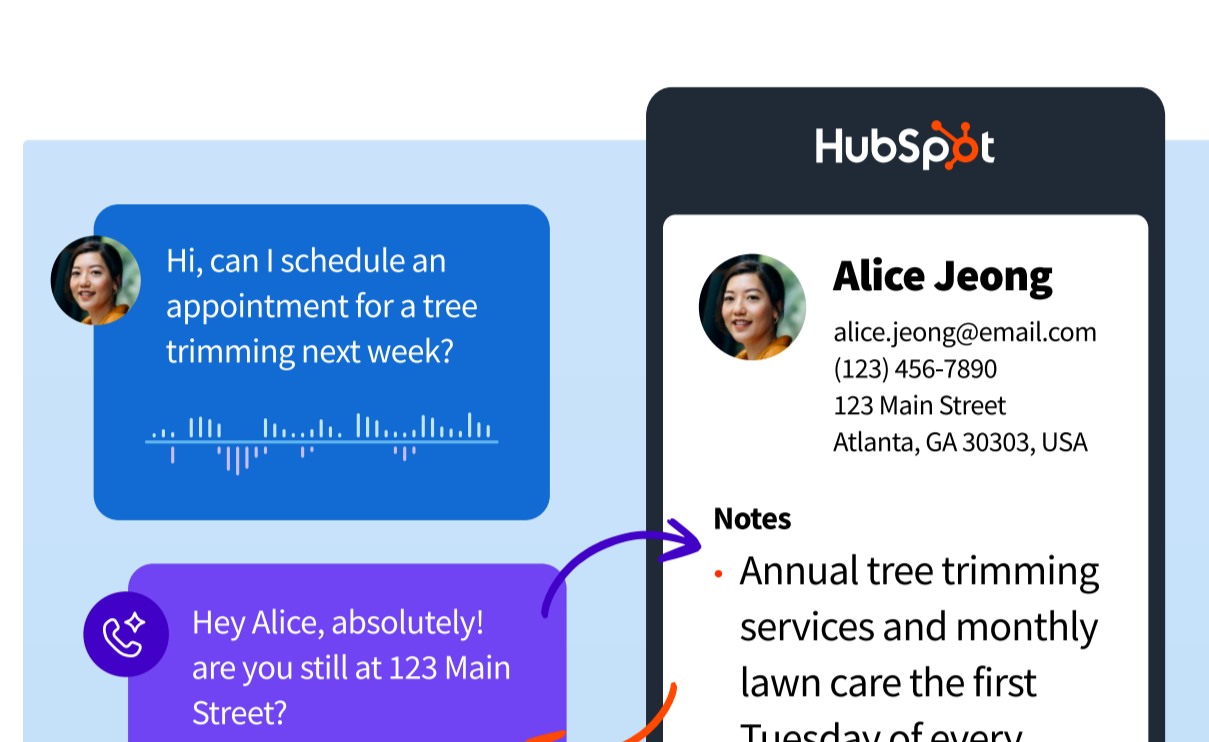
- ✓ Optimize campaigns for leads, not just clicks
- ✓ Stop guessing which keywords are worth your budget
- ✓ Trust your cost per lead figures, calculated automatically

PLAY 2



## Know your lead's story before you say Hello

When a call comes in, and nothing gets logged automatically, lead data goes missing, and follow-up slows down. Your team ends up spending time on data entry rather than on conversations.



With [CallRail's HubSpot integration](#), inbound calls and texts automatically create new leads or add activity to existing contacts, including the marketing source, PPC keyword, landing page, Google Click Identifier (gclid), tags, and conversion status.

Call recordings, summaries, and caller sentiment — powered by [Premium Conversation Intelligence™](#) — appear directly on each record, so your team can review each call and decide on next steps without listening to every recording. You can also tag and segment contacts using CallRail data, trigger workflows based on call outcomes, and configure call flows to match your existing setup.

For Voice Assist users, HubSpot adds CRM context before the call starts. Voice Assist instantly recognizes returning callers, skips questions your CRM already answers, and adds caller intake details and call summaries to the record.

### What you gain

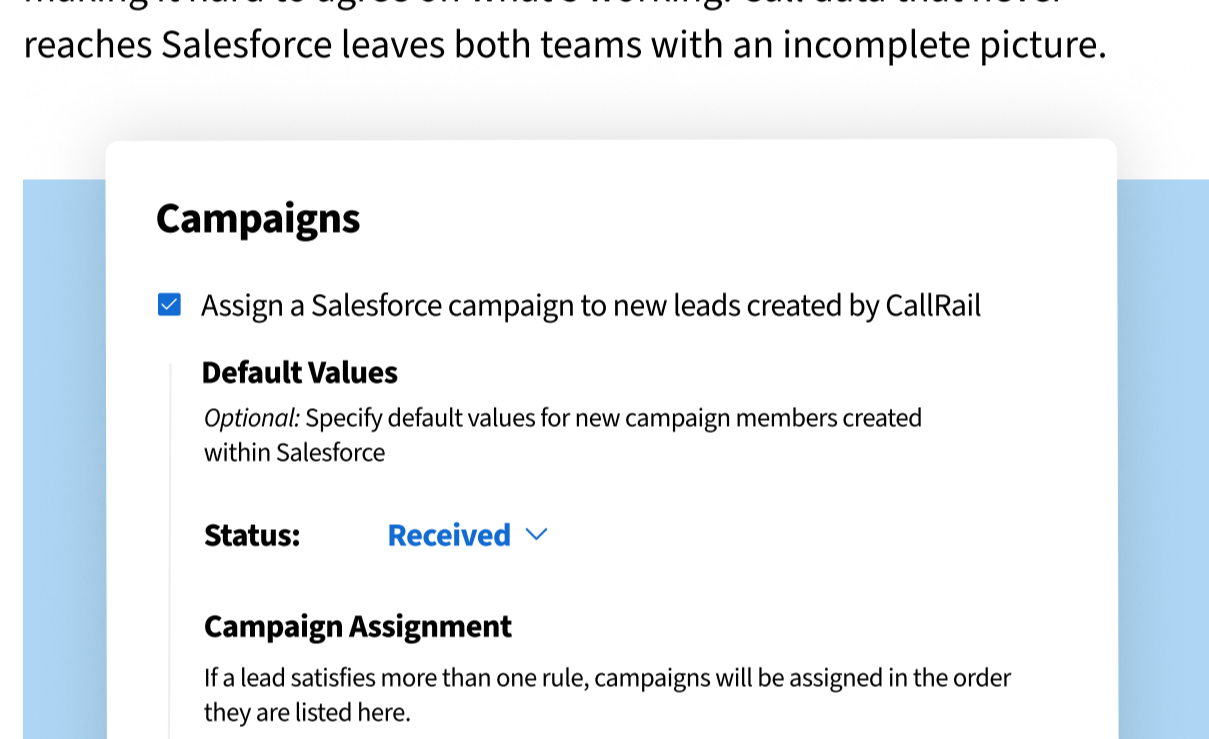
- ✓ Every call and text captured and attributed automatically
- ✓ Walk into every follow-up with customer context already in place
- ✓ Smarter segmentation and workflow automation based on caller behavior

PLAY 3



## Close the attribution gap from first click to closed-won

Sales and marketing often measure success in different places, making it hard to agree on what's working. Call data that never reaches Salesforce leaves both teams with an incomplete picture.



[CallRail's Salesforce integration](#) brings call activity, lead attribution, and customer information together in one place. Every call is tied back to the specific campaign that drove it, and [Call Tracking](#) automatically assigns a "good lead" status to qualified calls so your team knows exactly who to prioritize.

Reps can listen to call recordings directly in Salesforce before following up, and inbound and outbound call data makes it easy to see which campaigns are driving results — and cut spend on the ones that aren't.

### What you gain

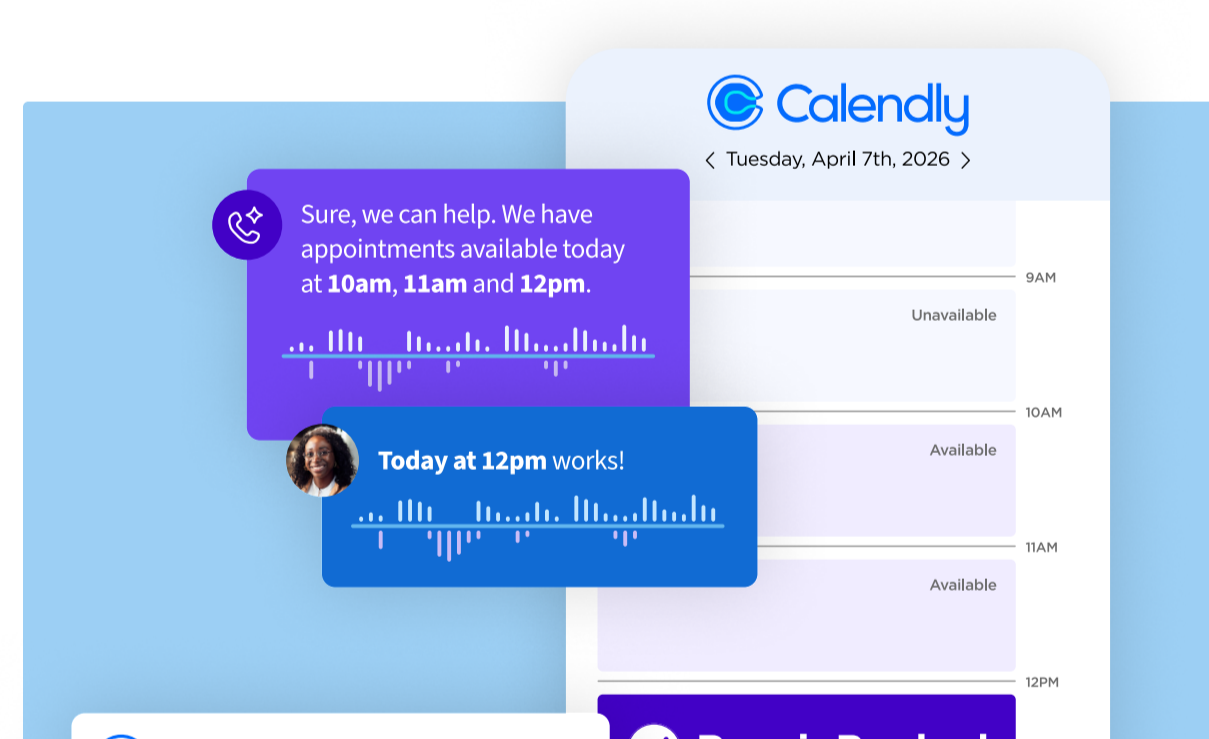
- ✓ No more gaps in Salesforce lead source data
- ✓ Automated lead scoring so your team focuses on the right calls
- ✓ Walk into every follow-up with full call context already in Salesforce

PLAY 4



## Turn every call into a booked meeting — instantly

A lead ready to book an appointment shouldn't have to sit on hold, leave a voicemail, or wait for a callback. Any friction at that moment costs you a conversion you already paid for.



[Voice Assist](#) and [Calendly](#) work together to remove that friction. [Voice Assist](#) answers the call, detects the caller's intent, then [Calendly](#) checks real-time availability and books the appointment before the caller hangs up. Your team starts the day with a calendar full of confirmed appointments — no scheduling back-and-forth, no manual follow-up.

The integration runs 24/7, so leads calling after hours get the same experience as those calling during business hours.

### What you gain

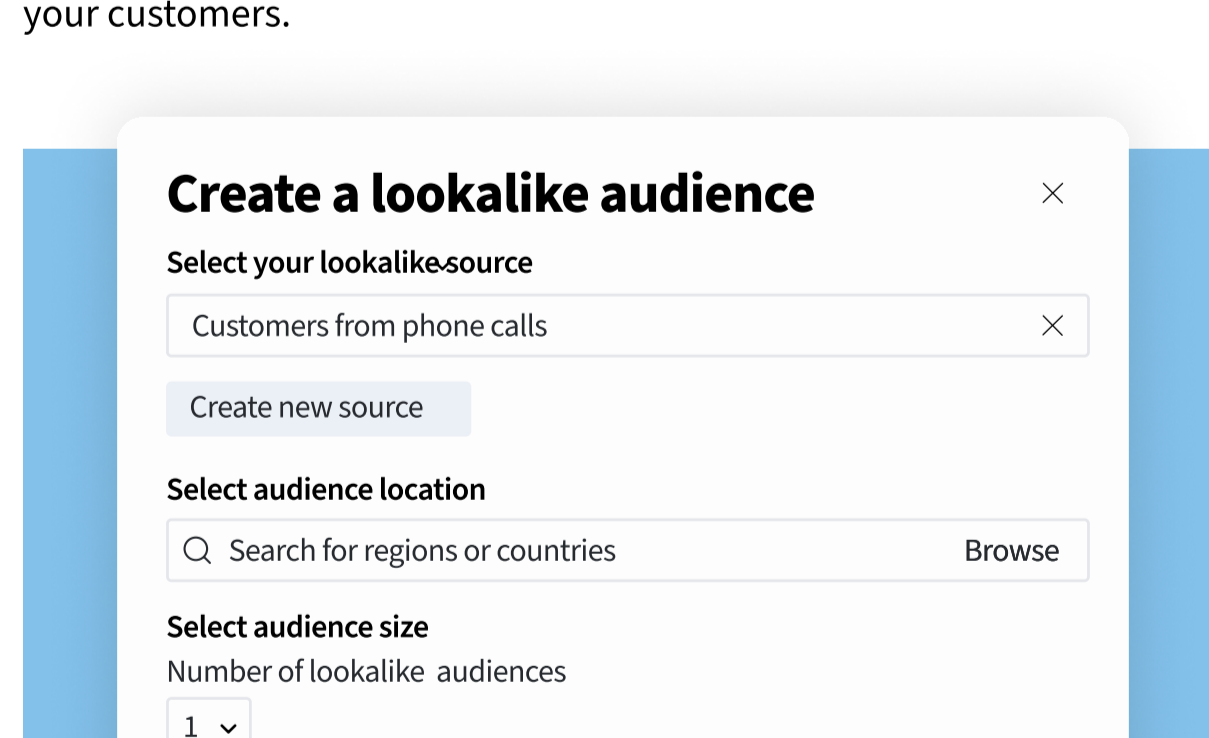
- ✓ Inbound calls converted to booked appointments automatically
- ✓ No hold time, no voicemail, and no manual scheduling follow-up
- ✓ Qualified appointments captured around the clock

PLAY 5



## Build smarter audiences using real-time caller behavior

Meta campaigns perform better when they use real lead data. Campaigns that only receive website click data end up chasing the wrong traffic instead of the people most likely to become your customers.



[CallRail sends your call, text, and form fill data directly to Meta](#) so your campaigns learn from actual lead activity, not just clicks. You can build audiences based on your callers — excluding existing callers from new prospect campaigns and re-engaging past callers with fresh messaging.

You can also build audiences that resemble your highest-converting callers, helping Meta target people with similar profiles. Results are reported at the campaign, ad set, and ad level so you can see exactly which efforts are driving leads.

### What you gain

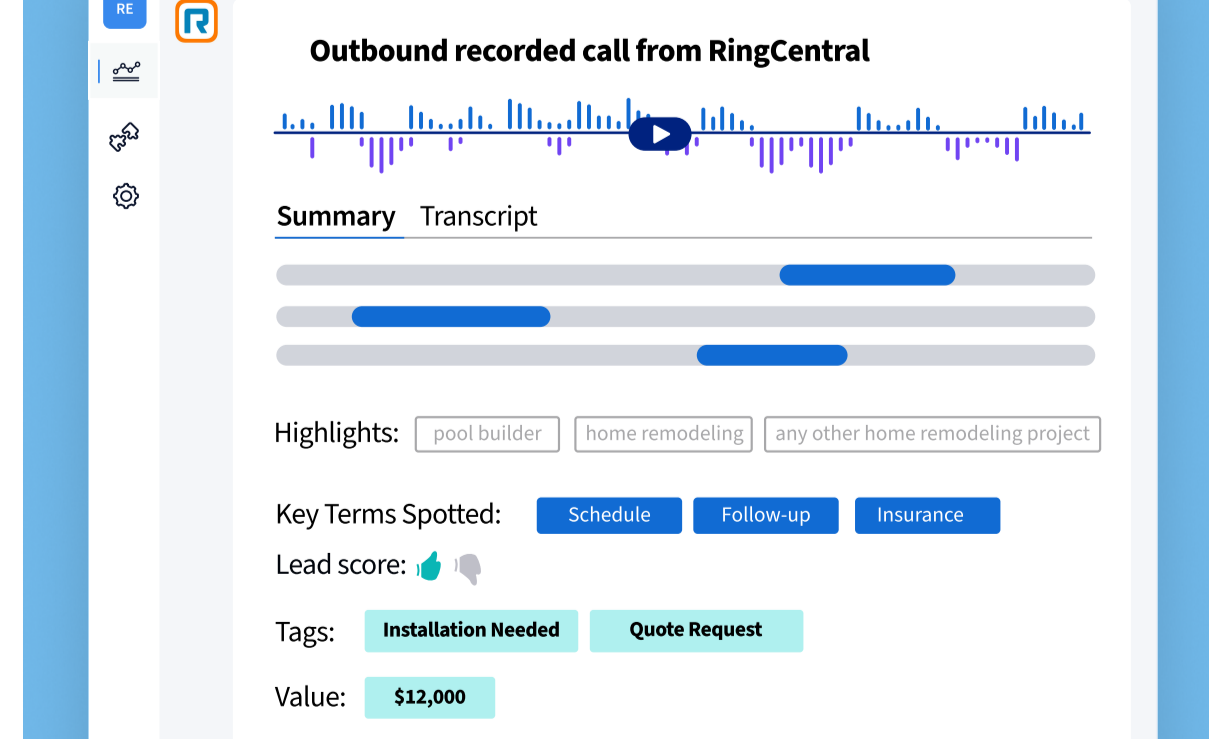
- ✓ Meta campaigns learning from real leads, not vanity metrics
- ✓ Smarter audiences built from actual caller behavior
- ✓ Less wasted spend on audiences that don't convert

PLAY 6



## Connect your phone system to your marketing stack seamlessly

Imagine picking up the phone already knowing exactly what brought the caller to you — which campaign they saw, which ad they clicked, before you even answer the phone.



[CallRail's RingCentral integration](#) shows the marketing source or campaign that drove each call directly in RingCentral's incoming call popup, so you know what brought the caller to you before you say hello.

Outbound calls made through RingCentral sync into CallRail alongside inbound data, giving you a complete view of each lead's journey. It works with RingCentral RingEX and fits into your existing setup without disrupting your workflow.

### What you gain

- ✓ See the call source before you pick up
- ✓ Inbound and outbound calls in one unified view in CallRail
- ✓ No changes needed to how your team already uses RingCentral

## Set it once, let it run

Sit back, relax, and let the data flow automatically between your tools. Your campaigns get better information to work from, your CRM stays accurate without manual entry, and your team spends less time chasing data and more time acting on it.

Try CallRail free for 14 days [Explore all integrations](#)

Already a customer? [Head to integrations on your dashboard to get connected](#)



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