

CallRail

Checklist

How to use Call Tracking and Conversation Intelligence® in medical practice marketing



Healthcare marketers might be shifting to digital channels for lead generation, but [phone calls are still the go-to](#) for leads to get in touch for an appointment. The problem? They can be tough to gain insights from with nothing on paper.

Call tracking ensures your medical practice doesn't miss a beat—or a lead. With it, you'll know what's working in your [marketing and patient service strategies](#) and can pivot to strategies that can help you achieve your goals:

- Attribute phone calls to marketing campaigns
- Measure marketing campaign performance
- Understand keywords driving leads
- Improve customer experience

Explore our checklist for a better look at call tracking and how to best leverage Conversation Intelligence® to inform your marketing activities.



Setting up call tracking

Thinking about taking the plunge on call tracking? You need to understand your purpose in order to get the most value. Start by thinking about which channels you are using and which ones you want to track:

- Digital, such as PPC, social media, and SEO
- Offline, such as print ads, billboards, and direct mail

Once you know this, it should be easier to determine the right [type\(s\) of call tracking](#) for you.

Source-level call tracking

Using a mix of media or just want to zoom in at the campaign level? Source-level call tracking uses a unique phone number for each campaign. These numbers can be used for both online and offline campaigns:

Online sources

- Paid search results
- Paid social media campaigns
- Organic search traffic
- Organic social media
- Referral pages and web directories
- Landing pages

Offline sources

- Printed material
- Phone directories
- TV and radio ads
- Call extensions

Visitor-level call tracking

A visitor-level view is particularly helpful when you want to understand your digital media efforts. With it, you can easily correlate calls to website visitors, providing insights into which PPC keywords are driving calls. The call tracking system generates a pool of phone numbers for your business so that when each unique visitor enters your site, they're assigned a contact phone number that links directly to them.

But visitor-level call tracking isn't just limited to your website. It brings [all digital sources together](#):

- Website visitors
- Google Ads
- PPC
- Landing page
- Referring page
- All except direct
- All except direct and organic



Implementing call tracking

Choose your call tracking technology solution—such as CallRail—and configure how to make it work for your needs. With it, you can reap several benefits:

- 20 percent reduction in cost per lead
- 10 percent increase in leads with better marketing insight
- 10 percent increase in the number of leads with reduced missed calls

But configuration is key. You may need several phone numbers to direct calls and even several options for monitoring to best serve patients and call agents.

Assign unique tracking numbers

Made your choice between visitor- or source-level tracking? Great. Your call tracking system starts working its magic by helping you assign phone numbers to your digital and offline marketing channels.

Decide how calls will be monitored

Call tracking allows you to customize how involved your practice is in each call, creating opportunities to monitor activities for later reference or real-time support. For instance, CallRail provides [several optional methods](#) to listen in:

- Silent monitoring: This allows you to listen to an active call without alerting the agent or the customer.
- Whisper monitoring: This enables you to enter an active call and talk to the agent without alerting the customer.
- Barge monitoring: This empowers you to join an active call so both the customer and the agent can engage with you.

Build out call flows

Create a seamless call experience with a [call flow builder](#) that streamlines routing as soon as callers connect to your tracking number. CallRail's call flow builder enables you to add custom greetings and IVR menus and even route patients to the last person they spoke to. Optimize patient acquisition with call flow builder's diverse features:

- Round-robin call queuing allows you to set a specific amount of time that each phone number should ring before moving on to the next number.
- Simulcall routes callers to several phones when multiple staffers are available for calls at the same time, connecting the first agent who answers.
- Geo-routing asks callers to input their area or zip code at the start of the call and routes them accordingly.
- Responsive routing sends callers to certain personnel depending on how much they've called you, their lead qualification status, or their website activity.

■ Implement call recording

Review any call, anytime—even in real-time. Call recording opens opportunities to explore what’s going right or wrong during call interactions. Improve staff performance, qualify patient leads, and maintain compliance. CallRail enables you to:

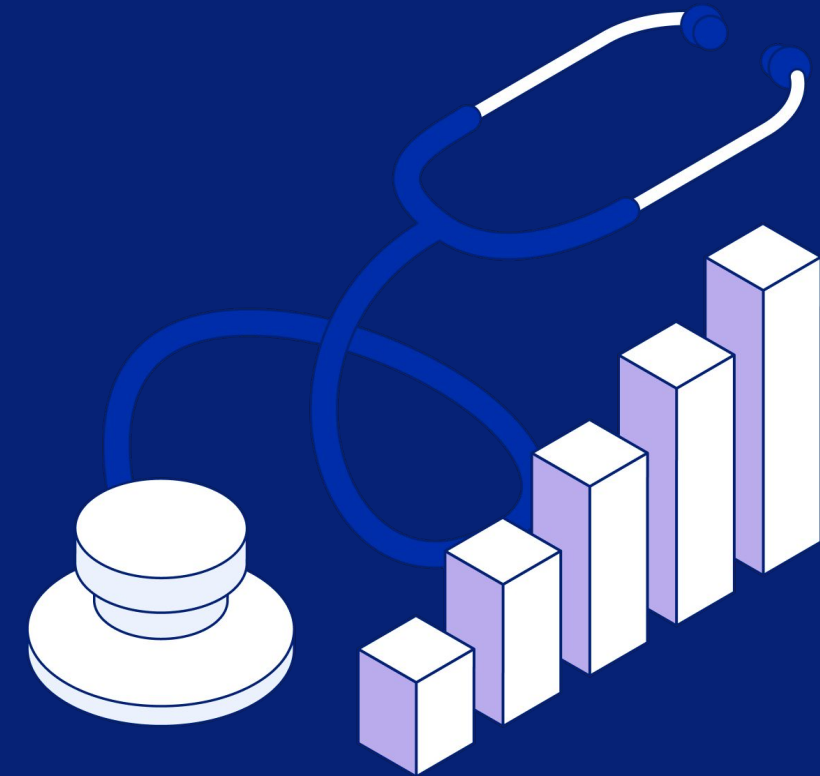
- Review call logs after each interaction to provide staff coaching and improve service.
- Support HIPAA compliance with call records that protect personal health information.
- Transcribe, analyze, and score leads via Conversation Intelligence.



What’s next?

Preview these upcoming implementation steps.

- [Install JavaScript snippet on your medical practice's website \(for tracking digital channels\)](#)
- [Setting up notifications](#)





Using CallRail's Conversation Intelligence to gather insights

CallRail is on the cutting edge of call tracking technology. Our system leverages next-level AI to automatically analyze inbound and outbound calls with near human-level accuracy so you can dedicate resources back to patients.

[Conversation Intelligence](#) analyzes calls for actionable insights. With it, you can take a glimpse into the past, present, and future and use the information to improve patient interactions and decision-making.

■ Analyze call data

Review call tracking analytics to get a better understanding of everything from call sources to specific call activities. Conversation Intelligence cuts the time you spend analyzing and reviewing calls in half by automating the process. CallRail's AI analyzes your call recordings to identify trends and aid in keyword spotting, auto-tagging, lead qualification, and sentiment analysis. This improves not only patient experience and call outcomes, but also the effectiveness of your marketing efforts.

Conversation Intelligence gives you access to [three main types of call analytics](#):

Historical call analytics

Bring the past back into the present to discover trends, patterns, and areas for improvement in your patient service team. Historical call analytics helps you understand customer interactions and agent performance with insights into:

- Call volume
- Average handle time
- First call resolution rate
- Customer satisfaction scores
- Objections handled

Real-Time call analytics

Respond here and now with immediate insights into performance. Real-time call analytics looks at ongoing call data so patient service teams can promptly identify and correct issues surrounding patient experience:

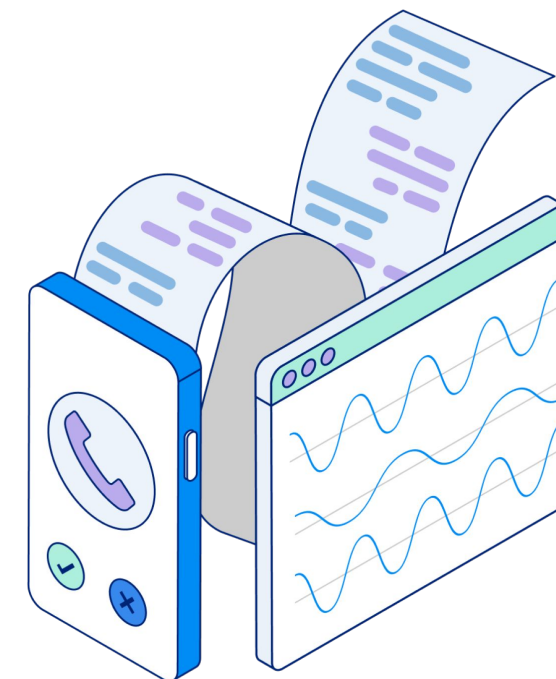
- Wait times
- Abandonment rates
- Agent availability

Predictive call analytics

See into the future with data analysis and machine learning. Predictive call analytics forecasts service team performance so you can prevent problems. Use the data to optimize performance and enhance patient satisfaction with:

- Call volume forecasts
- Agent performance predictions
- Customer behavior patterns

CallRail provides numerous reports to help support call analytics in all three areas. Explore our [reporting resources](#) to learn more about your options.



Examine patient service KPIs

Get actionable insights surrounding your patient service efforts. Several metrics help you identify trends, monitor progress, and make data-driven decisions regarding call handling, marketing campaigns, and the practice in general.

Call duration

How long a patient spends on the phone with an agent can point to whether or not their needs are being met. Long calls? A patient might be frustrated. Short ones? There's a decent chance they need more support and you'll hear from them again.

No matter the case, taking note of call duration helps you understand where to improve, such as optimizing staffing and training. You can cut down how many calls you analyze by filtering out those that are longer than a certain time frame to prioritize the most meaningful conversations.

Calls by agent

Are your agents effective? Viewing call summaries and analyzing call transcripts and [recordings down to the agent level](#) exposes individual strengths and weaknesses. With these insights, you can provide performance scoring and targeted feedback, opening opportunities to offer additional coaching.

Call abandonment rate

Waiting on hold isn't on many peoples' wish lists. Call abandonment shows the percentage of calls terminated by patients before someone answers on the other end.

If your patients are experiencing long wait times or poor service, you may see these rates spike upward. That's a clear sign to reassess staffing, whether by staffing more during peak times or simply staffing the right people.

First call resolution

Aim to get it right the first time, every time. First call resolution shows the percentage of calls your team resolves during initial contact.

First call resolution is a clear indicator of service team efficiency. The higher these rates, the more satisfied patients are with the team's competency. Low scores? It might be time to get back to basics with additional training, as patients aren't getting what they need.

Analyze call transcripts

Review call transcripts with transcription to understand each call from beginning to end. CallRail's Conversation Intelligence breaks call summaries into a few sentences for a bird's eye view that identifies pain points and high-priority calls before carefully transcribing them.

CallRail transcriptions automatically turn calls into easy-to-read text scripts available in multiple languages, making it easy to catch up without having to listen all the way through. Our system uses [dual-channel recording](#) to identify the agent against the caller to improve transcription, isolating background noise along the way to ensure full accuracy.

Analyze call transcript KPIs

So how do you know if transcription is providing value? CallRail helps to [isolate KPIs](#) that help you understand where you're succeeding or falling short during calls with leads and patients.

Analyze known good leads

As Conversation Intelligence's call tracking works in the background, it begins to pinpoint lead quality during calls. For each one that's flagged as a good lead, you can pull up the call transcription to see how and why the caller converted.

Seeing trends in services patients are looking for? Having the transcript in black and white shines a light on which marketing strategies may be most effective.

Understand unconverted callers

But what about when prospective patients don't choose you? Transcripts can help here, too, especially if they reveal pain points the agent couldn't address to the caller's satisfaction.

Not able to offer the scope of services someone needs? Agents not performing to standards? Examine transcripts to understand why conversations stalled out and how to improve for the next time.



Leveraging call tracking to keep improving your practice

Call tracking technology offers opportunities for continuous improvement across your medical practice. With it, you can not only elevate your marketing outcomes and patient satisfaction, but also ensure regulatory compliance.

■ Optimize marketing strategies

Take your marketing efforts to new heights with call tracking. The insights Conversation Intelligence provides help you distinguish between high-performing and underperforming marketing campaigns.

Leverage the insights from both call data and transcripts to make data-driven decisions. With data at your fingertips, you can adjust marketing budgets and strategies to help improve conversions, including:

- A/B testing content
- Refining ad copy
- Revising landing pages

Improve patient experience

Use call data to better understand patients and how your team could do better. You can assess call quality and outcomes and implement changes based on Conversation Intelligence insights.

Need to connect a little more deeply with those calling in? Your new approach can incorporate several strategies, including:

- Personalizing patient interactions and responses
- Tracking satisfaction via Net Promoter Score

Ensure compliance and data security

Understand your responsibilities regarding [HIPAA and HI-TECH compliance](#). Calls to numbers that are linked to marketing campaigns or keywords may expose information about individual medical needs and histories. Follow best practices to maintain patient privacy:

- Enter into business associate agreements with your business associates
- Never share user credentials
- Check compliance with integrations
- Cautiously export data

HIPAA's security requirements for protected health information (PHI) include two pieces. [The Privacy Rule](#) defines what PHI includes and who can access it in order to prevent disclosure and misuse. As an administrative operation on behalf of a healthcare provider, call tracking is allowed access—but only when HIPAA is being complied with. [The Security Rule](#) describes how PHI is protected. Call trackers must have operational and technical safeguards to prevent unauthorized disclosure of PHI.

CallRail's [end-to-end protection](#) protects patient privacy and prevents fines to your practice:

- HIPAA-compliant encryption in transit and at rest
- Business associate agreements (BAA) for each covered entity
- Automatic logouts after 30 minutes of inactivity to prevent unauthorized use
- Call recording access via personal and secure logins
- Personal information is only available inside the platform



Optimize your marketing with Conversation Intelligence

Getting the most from call tracking for your medical practice marketing means taking the right steps. From setting up the system in a way that suits your goals to gathering key analytics data, you can help your practice attract and retain valuable patients, improving their privacy and experience along the way.

Experience CallRail's Conversation Intelligence for yourself. [Book a demo](#) or [start your free trial](#) today to learn how advanced AI call tracking can move you forward.