

Your playbook for connecting marketing campaigns and front desk intake

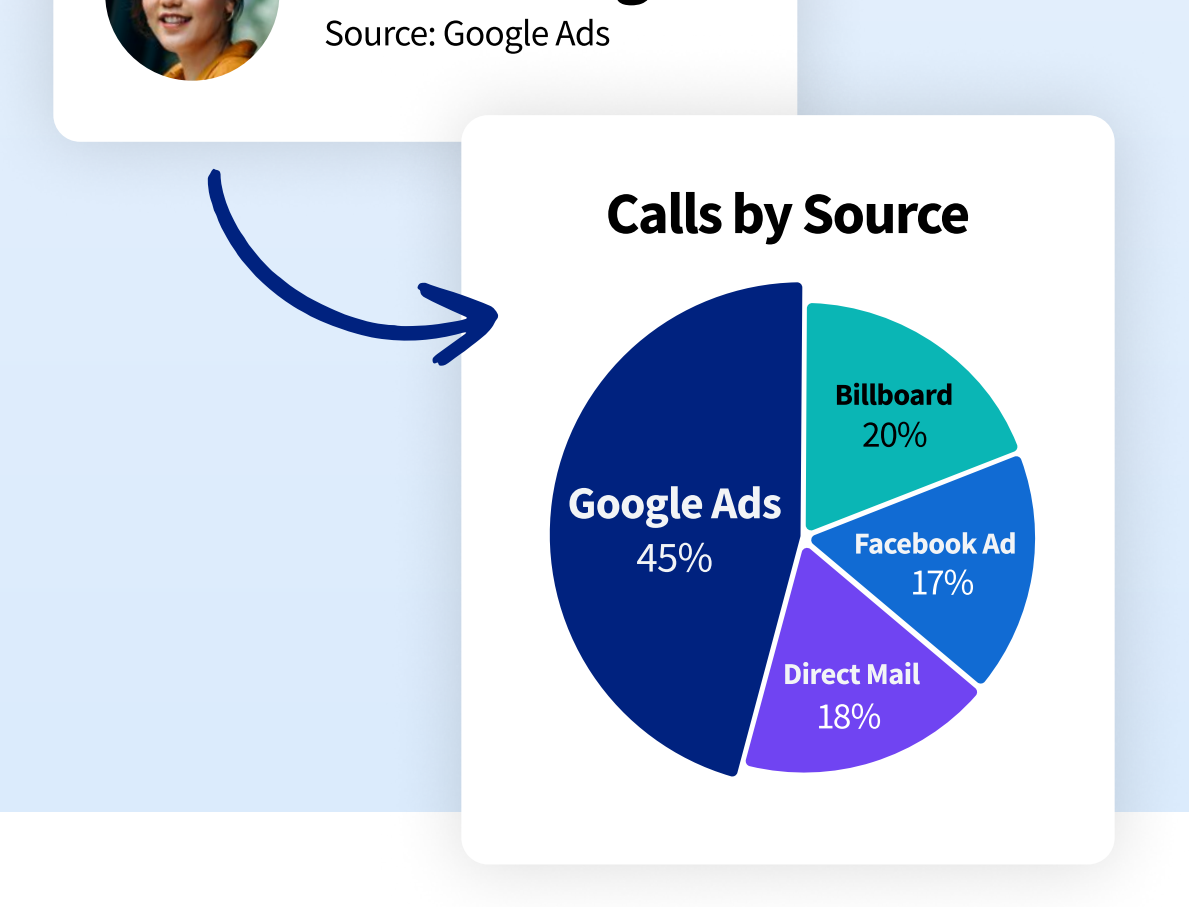
Your campaigns bring in the call. Your front desk answers it and books the visit. But those two halves rarely connect. Campaign data, call records, and patient bookings all live in separate systems, so seeing what actually drove a booking usually means digging through disconnected tools or guessing.

CallRail connects your campaigns, your calls, and your patients, so your front desk can keep up without wearing your team down.

See what’s bringing callers to your practice.

PLAY 1

Trace every call back to its source



A strong marketing strategy starts with knowing what's working, but when patient calls start coming in, most practices only see part of the story. They know a patient called, but not which campaign, keyword, or channel sent them there.

CallTracking gives you that missing piece with full visibility into where every patient call comes from. Dynamic number insertion (DNI) then assigns a unique tracking number to every visitor, automatically tying each call and form fill back to its source.

With calls, cost per lead, and conversion data all in one place, you can see exactly where your budget is working, without pulling someone off the phone to find out.

“CallRail takes us beyond counting clicks as conversions. We now see the end-to-end journey, allowing us to prove our marketing ROI by connecting campaigns to new appointments.”

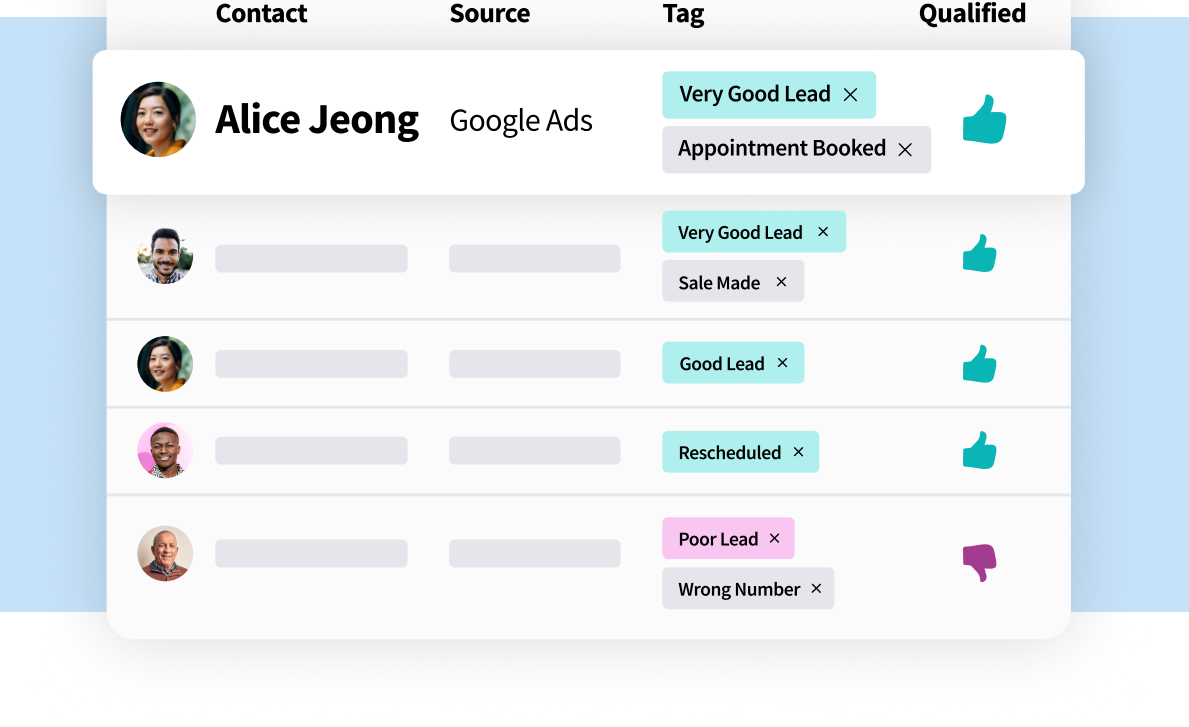
— Lauren Anderson, Sr. Digital Content Strategist & Copywriter, Baptist Health

PLAY 2

Spot your best calls before you call back

More calls only help if they lead to more patients. To improve performance, you need to know which calls, chats, and texts are most likely to lead to new appointments. Without the right tools, it's impossible to tell the difference at scale.

CallScore automatically rates every inbound call based on lead quality, so you always know which calls to prioritize. Send those high-quality calls back to Google Ads, so its bidding system can automatically put more of your budget toward the calls that turn into booked patients.



What you gain

- ✓ Clear visibility into which campaigns drive calls, texts, and chats
- ✓ More efficient ad spend that's focused on what converts
- ✓ More high-quality patient calls from the same marketing budget

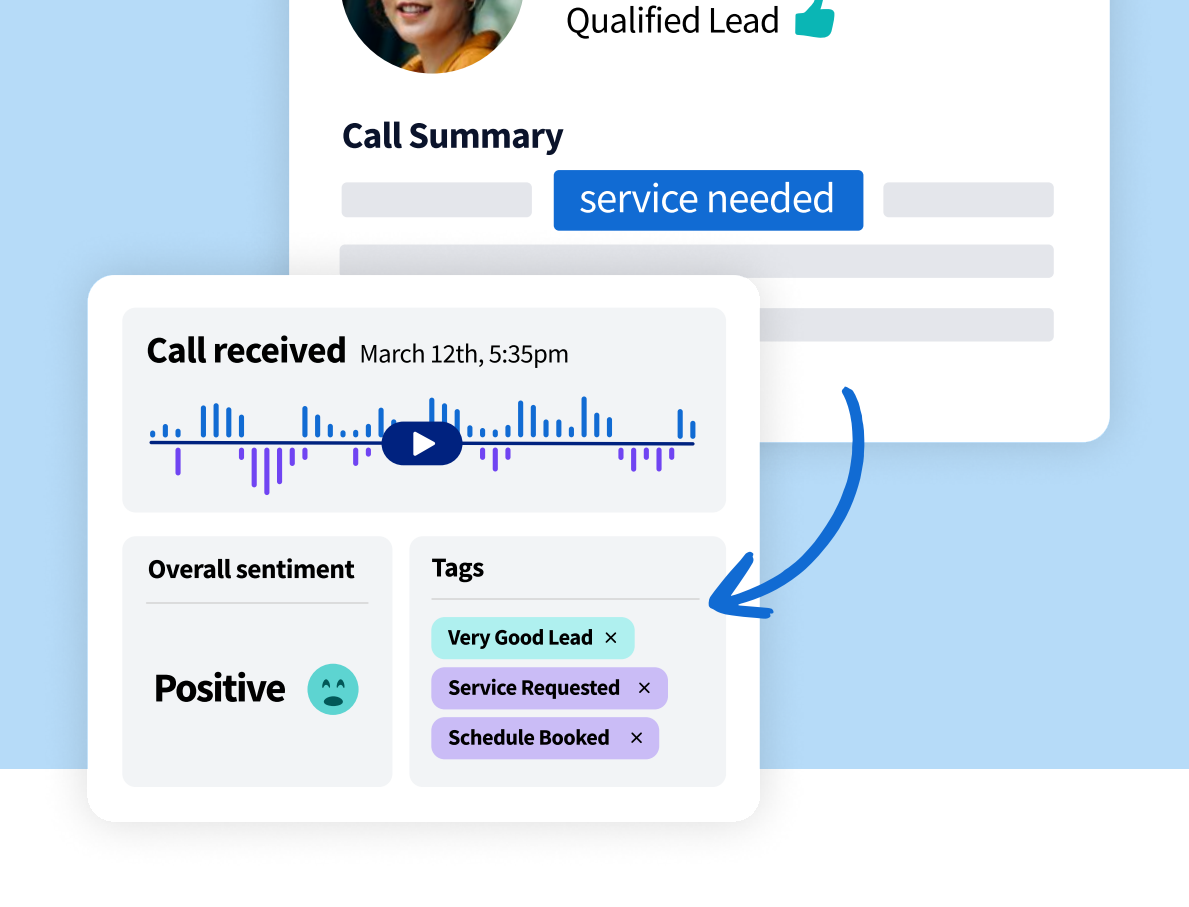
Prioritize the calls that matter most:

Knowing where a call came from only helps if it also tells your team which calls are worth calling back first. Pairing call tracking with call scoring turns a full voicemail box into a short, prioritized list.

Make every conversation count.

PLAY 3

Understand every call without sitting through it



Your calls are full of valuable information: what patients need, how they feel, and whether the call is likely to turn into a scheduled appointment. The problem is that no team has the time to manually review every conversation, and that's where critical insights get lost.

Premium Conversation Intelligence™ automatically summarizes every call, so you can spot recurring patient questions, catch a frustrated caller before it becomes a bad review, and see where your front-desk team needs coaching.

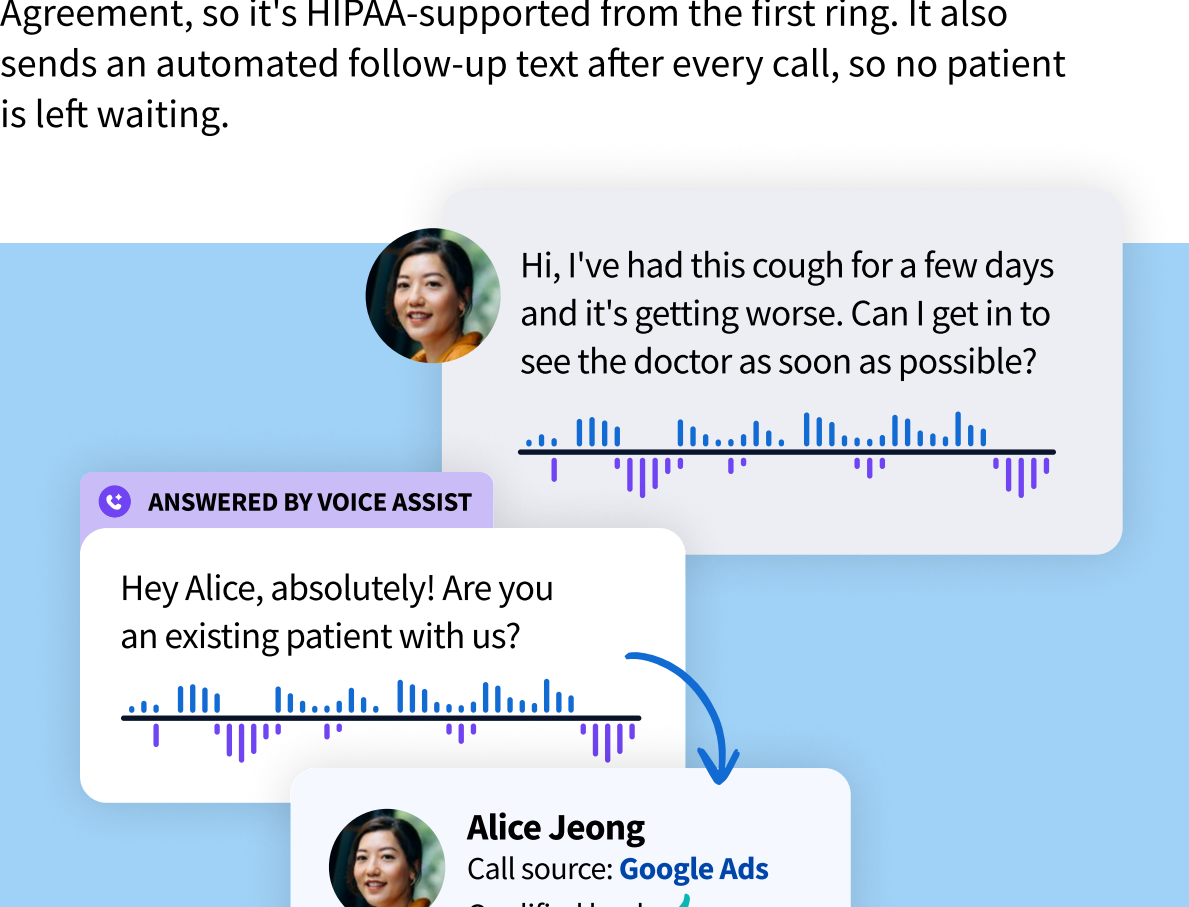
Those summaries carry the same protections that support HIPAA compliance across the rest of your practice's patient data.

PLAY 4

Keep the phone covered around the clock

Across industries, 28% of calls go unanswered. For healthcare practices, every one of those is a potential patient you paid to reach, now lost before the conversation even started.

Voice Assist answers every call, day or night, and captures what the caller needs before routing it to the right person. It's backed by CallRail's Healthcare Plan and a signed Business Associate Agreement, so it's HIPAA-supported from the first ring. It also sends an automated follow-up text after every call, so no patient is left waiting.



Every call is logged with an automatic summary, caller intake details, and a rating of how likely it is to turn into a booked appointment, giving your team the context to prioritize and follow up faster.

What you gain

- ✓ Every patient call captured after hours, during busy periods, and everywhere in between
- ✓ Real-time insight into what patients are actually saying
- ✓ Faster follow-up at scale without adding headcount

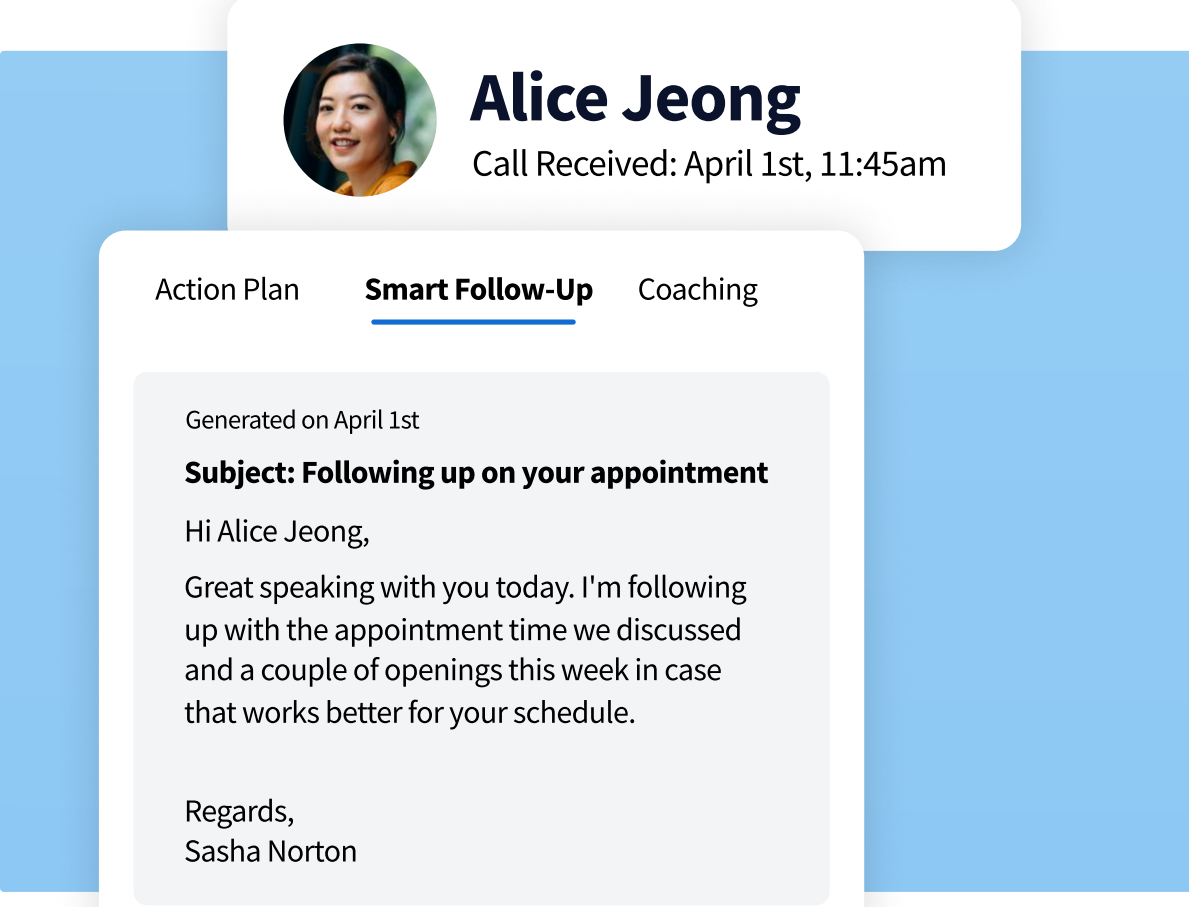
Answered and remembered, every time:

Answering the call is only half the job. Knowing what was actually said is the other half. Together, no patient conversation goes unanswered or forgotten, even on the busiest day.

Book the appointment, then prove it paid off.

PLAY 5

Turn every conversation into an automatic next step



Healthcare has the highest missed-call rate of any industry, at 32%, according to CallRail's own research across more than a million business conversations. Speed matters when it comes to converting callers into booked appointments, but keeping up with every inbound call is not always realistic, especially when your team is busy.

When you miss a call, CallRail can connect directly to your practice's CRM through the Keragon and Freshpaint integrations — so the next step is already taken care of.

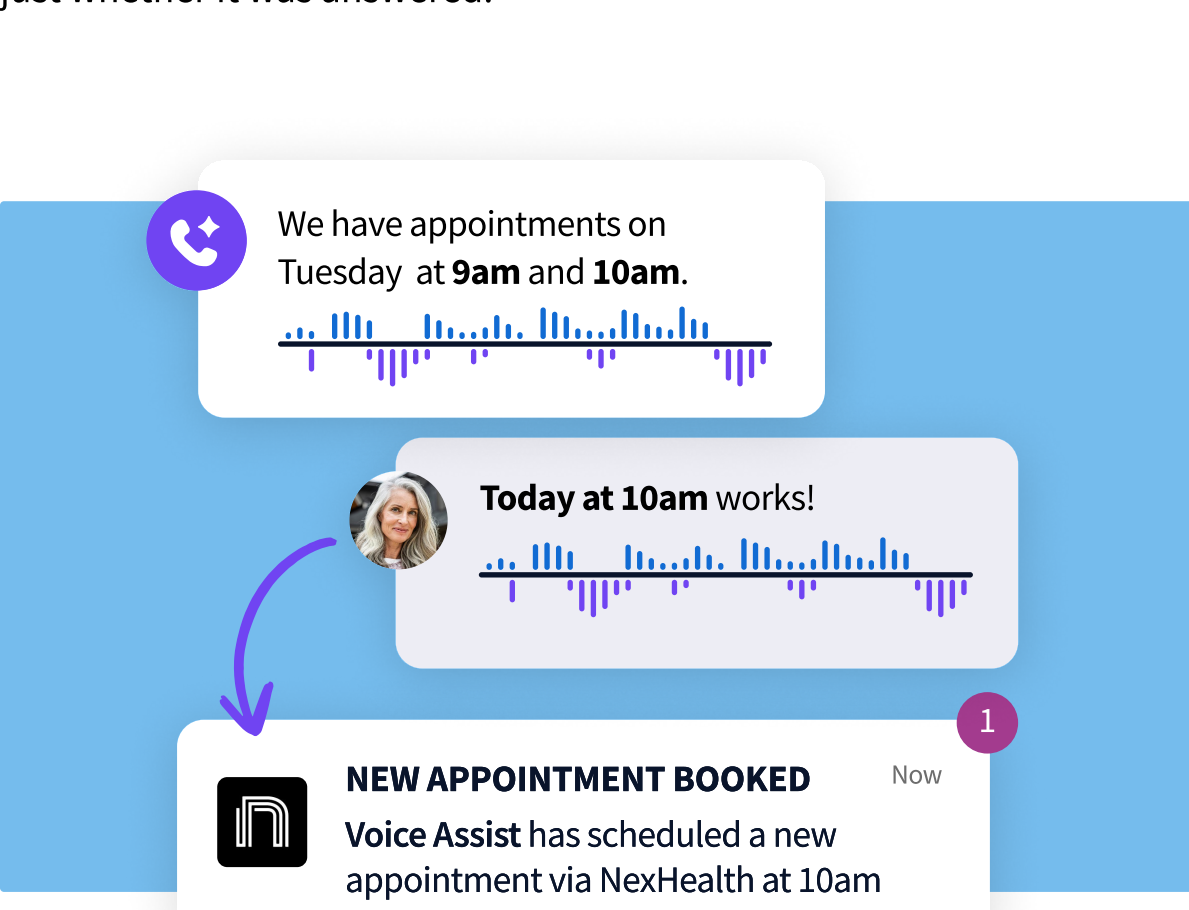
Premium Conversation Intelligence gives your team a recommended action, a personalized follow-up message, and coaching notes after every call. Instead of spending time figuring out what happened and what to do next, your team can move straight into follow-up.

PLAY 6

Connect every call to a new patient

Most practices track their calls, practice management data, and marketing results in separate systems, making it nearly impossible to connect marketing spend to patient outcomes.

CallRail now partners with NexHealth, unlocking integrations that allow you to connect directly to the scheduling and Electronic Health Record (EHR)/patient management system (PMS) your practice already uses — match every call back to its source and see whether it actually turned into a booking, not just whether it was answered.



Map booked patients back to the exact campaign, ad, and keyword that drove them, so you always know which marketing dollars are actually worth spending again.

What you gain

- ✓ Faster response to patient calls at scale
- ✓ Full attribution from first click to booked patient
- ✓ Proof of marketing returns to share with stakeholders

From a missed call to proof it paid off:

CallRail gets the appointment on the calendar. Connecting that booking back to your EHR/PMS confirms it happened and shows which campaign made it happen. Together, a missed call turns into a booked, attributable patient without a staff member touching either step.

Give your front desk room to breathe

CallRail helps you answer every call, understand every conversation, and connect every patient back to the campaign that drove them for faster booking, stronger patient relationships, and a clearer return on your marketing spend.

That's why more than 2,600 healthcare providers trust CallRail. Try CallRail free for 14 days and take the pressure off your front desk without adding headcount.

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Get a demo →