Are your business communications a mess?

How 7 businesses modernized their communications and eliminated communication chaos

Here are some scenarios

that your business might relate to that have positive business outcomes thanks to Lead Center's centralized, accessible, mobile, and marketing-friendly customer communication features.

Communication struggles are common in small businesses. Owners and teams frequently face problems like juggling too many calls, not knowing who talked to a customer and what was said, and lack of visibility into how calls are being handled.

Is it too much to ask that company representatives get a little background on a customer's previous interactions? Or that reps see which ad prompted a prospect to call your business? Fortunately, those are reasonable requests even for small businesses, and **Lead Center by CallRail** is helping many businesses transform their customer interactions for the better.

"Our lead tracking is a mess! We're calling some people back multiple times, others we're not calling at all, and some leads are getting routed to the wrong person."

Lead Center's **team inbox** and **call routing** features automatically track and route incoming calls, ensuring they go to an assigned or available agent. This means customers always reach someone who can help, and calls don't go unanswered.

Improved visibility also allows representatives to track conversations so they can more easily follow up with insight into a customer's interactions with the company. This has helped the D.R. Horton team save time and increase revenue.

Stop the lead tracking chaos

D.R. Horton, the largest home builder in America, struggled to manage and track leads in its New Mexico division. Lead generation in the real estate industry can be costly, so missed opportunities often meant thousands of dollars down the drain.

The sales team lacked visibility into incoming leads, so it was hard to tell whether someone had already followed up. They also couldn't see where calls came from, so they weren't able to forward them to the right representative. While some customers didn't get callbacks, others got contacted multiple times. Not surprisingly, customers would get frustrated when sales representatives asked questions they had already answered on previous calls.

Contact	Most Recent Call	First Touch	Qualified	Tags
Cooper Harvey 582-400-4650	Jun 28 11:34am	Direct Mail	👍	New AC ✕
Murphy Brooks 239-976-7018	Jun 28 9:25am	Referral	👍	Quote Request ✕
Darin Bruce 308-958-6543	Jun 28 8:22am	Google Ad	🔇	Wrong Number ✕

"With CallRail's Lead Center, our lead management went from a free-for-all, firing from the hip situation to an organized, strategized, and thought out workflow."

– TJ Meaney, DR Horton

"We're asking customers a bunch of questions every time they call—and they're getting super annoyed!"

Cut down on questions

Employees at Top Job Asphalt needed to ask a lot of clarifying questions to figure out why customers were calling. There was no way to know how they found the asphalt company or how they had engaged with them in the past.

An inefficient sales workflow was also responsible for losing leads. The systems for inbound and outbound calls weren't integrated, making it hard to switch between making calls and answering them. Sales consultants also didn't have a way to record details about incoming calls in the system. And when an agent missed a call, there was no caller ID or easy way to access voicemail.

Lead Center's **built-in intelligence** tells employees exactly which ad or listing prompted a call so that representatives can have smarter conversations with prospects and customers. Users easily see why a customer called, what information was previously shared, and who handled their past calls. This has made it much easier for employees to know where to pick up the conversation. Ultimately, Lead Center has helped double the company's year-over-year sales growth and significantly increased its closing rate.
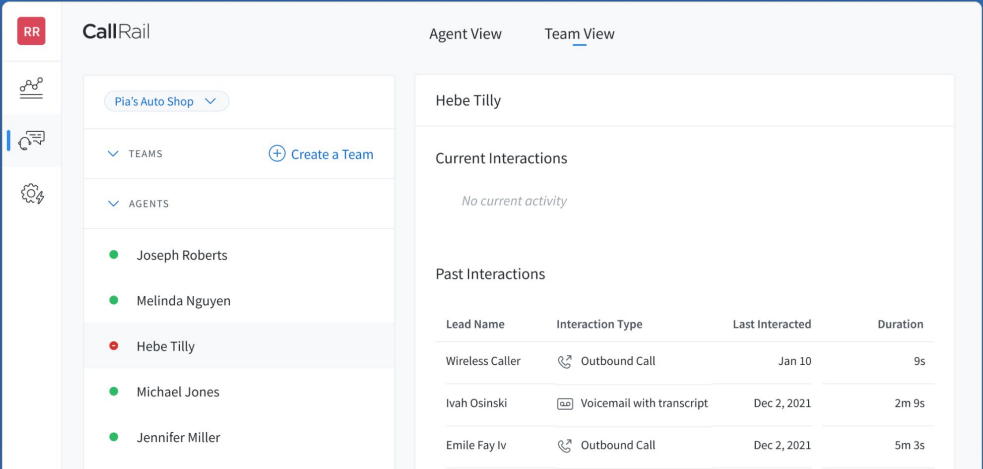
"Lead Center helps us build a genuine connection with leads. Instead of having to ask a bunch of repeat questions, we can get straight to the heart of what they need, which has helped us increase our revenue and closing rates and improve customer satisfaction."

– Josh Larsen, Marketing Manager, Top Job Asphalt

"Returning customer calls feels like a gamble. If no one calls them back, we may miss out on business. But if we return the same call more than once, they might think we don't have our act together."

Solve customer callback mysteries

"Did you ever call that customer back…" commonly echoed in the halls of DCI Properties real estate office. There wasn't an easy way to see past interactions with customers, and phone systems weren't user friendly. Scheduling, notes, call routing, and lead tracking were all over the place without a centralized place to manage messages and other communications. And without knowing where calls were coming from, no one knew which marketing campaigns were working and which were wasting money.

Lead Center's **customer interaction timeline** shows detailed information for every lead. For every contact, agents can see the history of each call, text, form submission, live chat, or other interactions — including whether someone has already returned their call. The centralized inbox also lets everyone see at a glance whether someone in the office replied to a customer's text or form request.
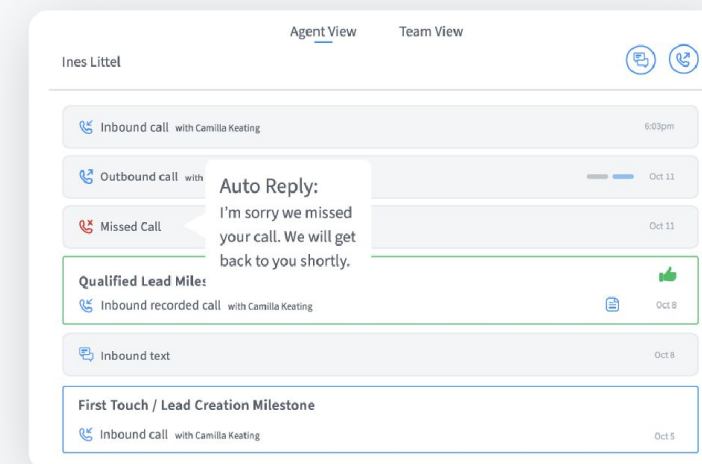
Lead Center's **lead intelligence, transcription,** and **keyword spotting** all help in refining ad strategies. These features also help in setting keywords and talk tracks to improve marketing and sales by uncovering where to enhance employee training.
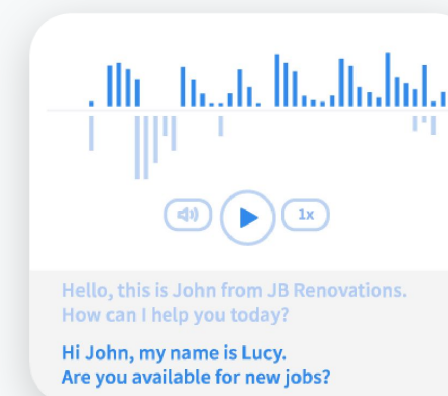
"[Lead Center] is an all-in-one interface for scheduling, reviewing calls, monitoring calls, and tracking your lead flow."

– Ryan Parker, Director of Operations, DCI Properties

THE PROBLEM

"We're often stuck looking through a pile of sticky notes to figure out what was previously discussed with a customer. It's stressful, inefficient, and we usually never find the right sticky note."

Say no to sticky notes

At Screen Medic, team members placed sticky notes all over their desks with comments about recent conversations and people they needed to call back. With only sticky notes for reference, agents had no idea what the other reps on the team discussed previously with leads and customers. Team members were frustrated with the lack of information, and customers were frustrated at having to repeat requests and answer the same questions again.

THE SOLUTION

Lead Center's **recent missed calls** feature prompts team members to return calls and can even send an email reminder. The **notes** feature lets users see what other agents wrote about previous customer calls, and **tags** keep important information accessible so all team members can easily go into any conversation fully briefed. These features improve internal communication and workflows for responding to customers. And customers don't have to answer the same questions repeatedly or explain themselves to each new representative. Calls go faster and more smoothly, and by returning more calls, Screen Medic was also able to get more leads.
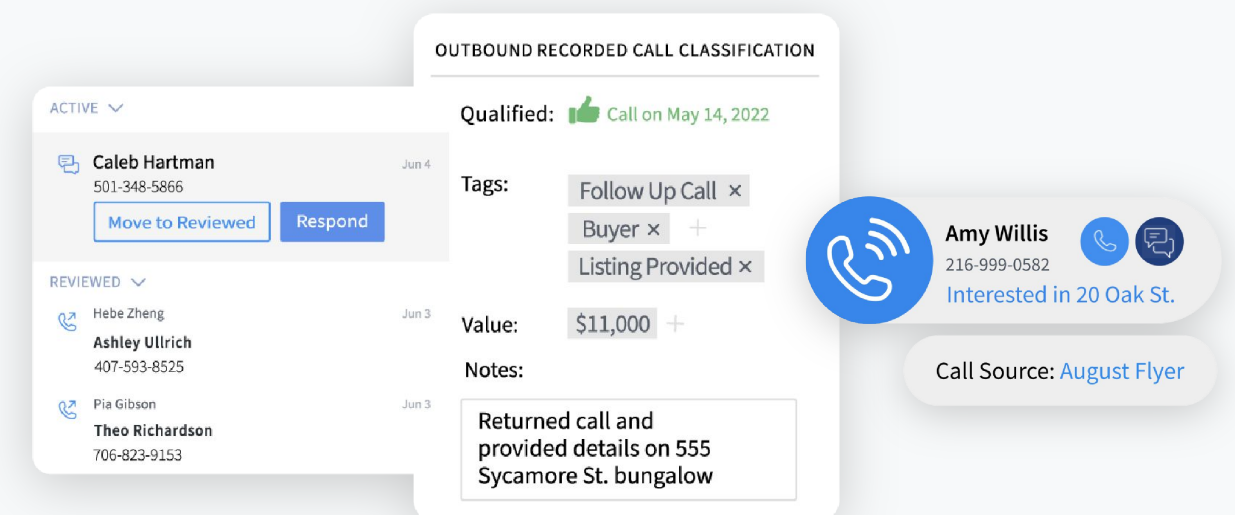
"[With Lead Center] we are instantly bringing the customer up to speed; they don't have to repeat themselves, making our calls faster and setting credibility with the customer."

– Chris Berg, Co-Founder, Screen Medic

"It's a challenge to get hard evidence that we're getting great results for our clients. We need better tools to be able to prove our value."

Eliminate doubts about where leads are coming from

The healthcare agency, SearchIt Media, wanted to get more patients for their clients while also ensuring their clients knew the agency was responsible for generating those leads. But they currently weren't able to measure how well marketing platforms were doing and needed better tools for lead attribution for their clients.

Lead Center's features, such as **unified inbox, customizable call handling,** and **call routing,** helps employees respond more quickly to customers to ensure they get the attention and answers they want. Lead Center's lead tracking goes beyond lead attribution. Users can follow the movement of leads through their sales funnel and make improvements to close more customers.

With Lead Center, SearchIt Media was able to set up automated responses to web forms, which improved response times and lead visibility. These efforts ultimately increased clients' ROI.
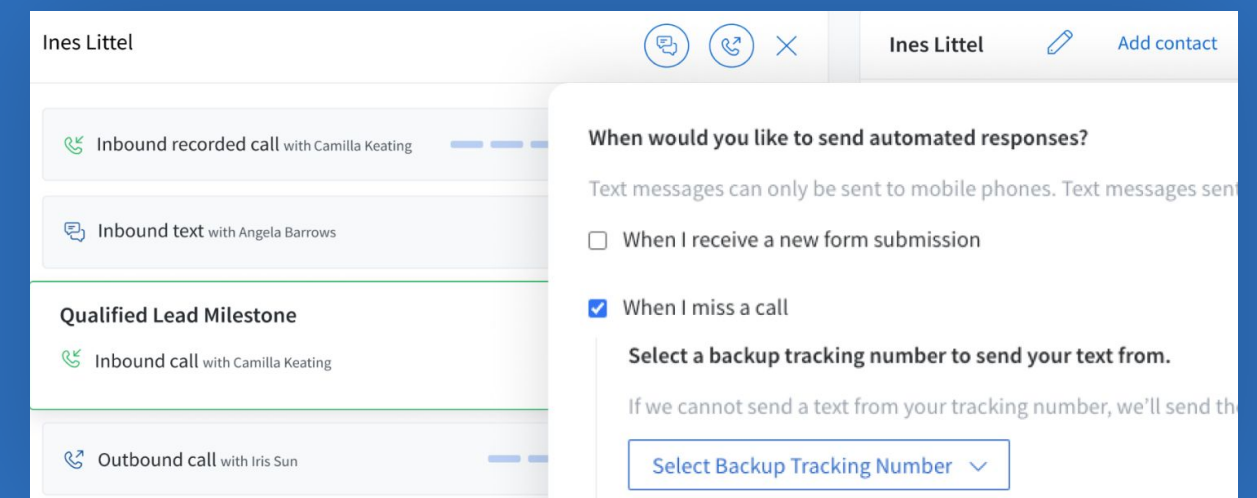
"Lead Center has allowed us to not only capture a better ROI, but it also seamlessly puts all that lead data together in one place and gives us a clear picture of how people want to interact with our doctors."

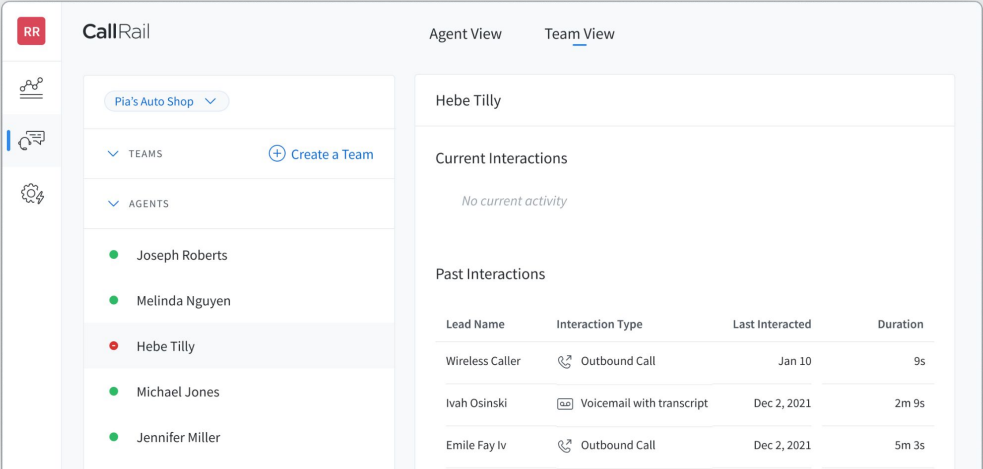– Jillyn Johnson, client of SearchIt Media

THE PROBLEM

"We don't know which location is outselling the others each month. By the time we compile all the numbers, we don't know why one location did better, and we certainly don't know how to replicate the results."

Know more not knowing why

Dealership sales managers had trouble telling how their teams were performing overall, and they didn't have the tools to compare one franchise to another. Without performance data, managers couldn't see which dealership locations needed additional training, and they didn't know what kind of coaching would help.

THE SOLUTION

Lead Center's **team-level reporting** lets managers see which of their teams and locations are performing best, which need coaching, and who the top agents are. Then managers can better understand those agents' methods and share best practices with other team members. It also offers actionable insights by allowing managers to use report templates or customized reports to break down data by locations, agents, or time frames to see call volume, call duration, missed calls, call tags, and more.

"One of the things we like: when you look into call recordings, you can see who's been talking the most, the agent or the customer. That's a key thing."

– Ryan Parker, Director of Operations, DCI Properties

THE PROBLEM

"Taking time off is nerve-racking and sometimes creates chaos for the people left in the office."

Stop feeling tied to your business

A small business owner had trouble attending to an appointment or taking a break without feeling like the business would fall apart. There weren't enough people on staff to answer all the calls when someone was out sick or even running errands. The small business owner didn't want to risk frustrating customers or missing out on business.

THE SOLUTION

The Lead Center **mobile app** lets users make and receive calls and texts from business phone numbers using their own mobile phones. Users can set themselves to "unavailable" so Lead Center will auto skip them in its call rotation. They can easily see call transcripts, marketing source, which calls need to be returned, and a caller's history of previous communications in a single view. Though they're using their own mobile phones, customers won't see employees' personal phone numbers. Users can also use their phones to access the team inbox, send and receive texts via the business number, make calls, accept and transfer calls, respond to calls and messages with a single click, and more.
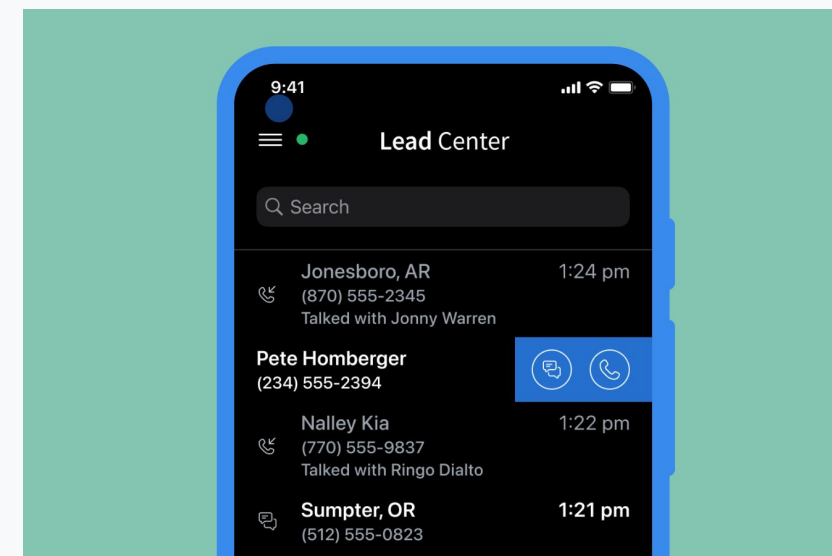
"Having the Lead Center app on my phone is crucial."

– Kyle Pullin, Customer Service Manager, Toronto Tees

CallRail

Stop missing out on calls, messages, leads, and revenue.

Try Lead Center free for 14 days
to capture more leads, see marketing results, track your team's performance, and grow your business.

Sign up for free today