CallRail

The ultimate customer experience toolkit

Using CallRail to keep your customers close



Introduction

Having a great customer experience (CX) is no longer a competitive advantage — it's now an expectation.

These days, consumers have more choices than ever before. They *could* drive into town, head into your legal practice, and sit down to have a chat about their requirements with a member of your team. *Or*, for a similar price, they could virtually connect with a legal practice located on the other side of the world — and they wouldn't even need to get up out of their chair.

Standing out in an increasingly competitive, globalized world is becoming more difficult by the day.

This has been exacerbated by COVID-19, with 51% of SMBs reporting that the pandemic has significantly impacted their sales or revenue.

With local stores closed during mass lockdowns, life — whether work, social, or retail — has become fully digital. But there is no hiding online. A loyal customer might have always used your auto shop because you're located opposite their office.

Now that they don't need to go to work. They can decide to check out other options online. This research unfortunately reveals that your competitors are quicker, cheaper, and will even return their customers' cars to their front door once they've finished working on it.

Just like that, you've lost a loyal customer.

So how can businesses beat out the competition despite the significant challenges posed by increased competition and pandemic-related disturbances?

By improving their CX.



While it may be a hot topic right now, CX is more than a mere buzzword. Figures show time and again that CX may be the *single* most crucial factor to generating long-term customer loyalty and boosting revenue.

86% of customers will pay more for a positive CX.

Conversely, <u>Microsoft</u> found that 61% of consumers will stop doing business with a company after just a single negative customer experience.

Let these figures sink in for a second.

Not only will customers pay more for a great CX, but this experience will itself attract more leads and close more prospects in the first place. You'll be able to charge more per sale while also making more sales: a win-win situation.

Conversely, if you fail to get CX right for just a single moment, then you risk losing that customer entirely.

However, improving your CX isn't as simple as flicking a switch or reminding call agents to adopt a bright and cheery tone. Having the right tools at your disposal is crucial — indeed, 73% of SMBs plan to (or already have invested) in technology to help them improve their CX. Or, you may even already have these tools, but perhaps you're not maximizing them to their fullest extent.

That's where CallRail comes in. Our all-encompassing platform allows you to make the most out of the resources available (technological, financial, and human), revolutionizing your CX, transforming your bottom line, and ultimately, making your customers more sticky.

This eBook will provide five simple tips to help you get started using CallRail.

How five seconds can make or break your CX

As COVID-19 spread rapidly throughout the world, people stayed indoors en masse — meaning life moved digital. This had a profound impact on businesses of all shapes and sizes.

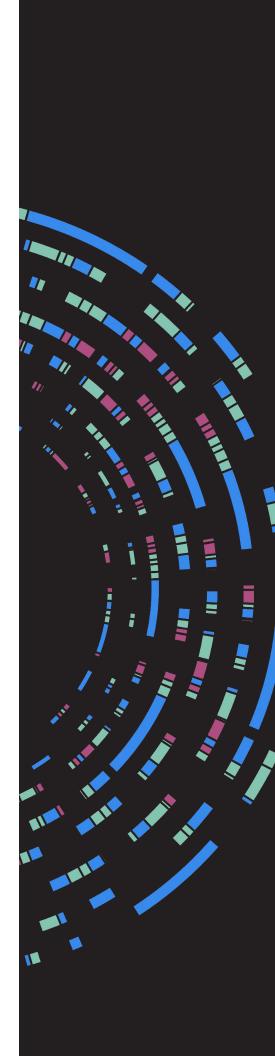
Carefully curated in-person experiences matter little when customers aren't allowed to speak in person. Indeed, businesses that had subpar online presences quickly fell behind their competitors.

CX has always been important — but it's arguably never before been this important. Creating a positive in-person experience can be fairly easy. If you are a healthcare provider, for example, you can ensure that your waiting room is well-decorated, that patients are offered a drink while they wait, and that healthcare practitioners are rewarded based on customer feedback.

When it comes to online experiences, however, things aren't quite so simple. Businesses need to ensure that everything they do is seamless, appealing, and adds genuine value to the customers' journey. A web page that loads too slowly may quickly frustrate customers, leading them to bounce from your site.

The first five seconds from a customer clicking onto your website have a crucial impact on your conversion rates. Five seconds. If you compare this to an in-office experience, that's around the time it takes for a customer to walk in the door, take a handful of paces, and only just begin to speak to your receptionist/office manager.

Consumers are far pickier when it comes to digital experiences versus in-person alternatives. If they're walking around downtown and they don't like the look of your store or office, they *could* choose to go to a competitor instead.





Online, however, they can instantly return to their Google search results, where your competitors await them.

Even when COVID-19 is but a distant memory, its impacts will still be felt. In China — where the virus has now largely been contained — a reported 55% more consumers are regularly shopping for groceries online compared to pre-pandemic figures.

There's one key lesson here: online CX is far from a fad. It's here to stay. Companies need to prioritize their digital CX if they want to outlast the competition in the long run.

Unsurprisingly, this goes beyond simply ensuring that web pages load quickly.

Companies must personalize experiences according to each individual visitor. They need to be understanding and empathetic, demonstrating that each consumer is a person — not just a business opportunity.

They must be consistent, reliable, and contactable. Most importantly, they need to be human while leveraging all the capabilities that digital tools have to offer.

This is where leveraging an omnichannel solution like CallRail can help. Having strong CX capabilities is even more important now that we're entering a period of economic uncertainty — McKinsey figures show that companies leading the CX charge outperform relative laggards by three times during recessions.

Let's take a closer look at the five ways that CallRail helps businesses reinvent their customer experience, retain more customers, and transform their bottom line.

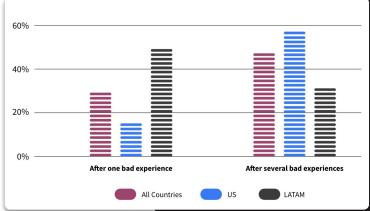
5 steps you can take to transform your CX for good with CallRail

1. Create a seamless experience from first touch to the last

Remember: you likely won't get a second chance to make a first impression.

Why is this so important?

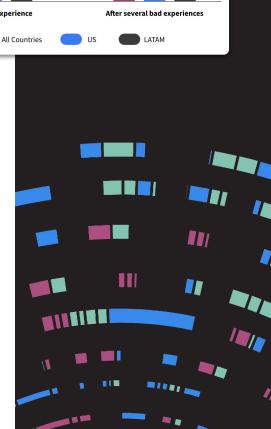
First impressions are reportedly formed within the first seven <u>seconds</u>. If five of those seconds are taken up by a web page loading, annoying banner ads popping up on the screen or an agent coughing during a customer call, your conversion rates will drop. If you recall the <u>Microsoft</u> statistic referenced previously, six out of ten customers will never again return to your company after just a single negative experience alone.



The message is clear: you need to eliminate frustration and build confidence from the very first touch. This is a must. But how can you ensure that the customer's first touch is as optimized as possible?

First, your CX needs to be frictionless. Not 'okay,' or 'does the job,' or 'fine once you get the hang of it,' but absolutely frictionless.

As <u>KPMG</u> states: "Removing unnecessary obstacles, impediments, and bureaucracy to enable the customer to achieve their objectives quickly and easily have been shown to increase loyalty."



We live in the age of instant gratification and an overabundance of choice. Consumers won't hang around for you to get your act together — they'll bounce, hang up the phone, or walk out of the store.

Second, your CX needs to be helpful from the very first moment you encounter a new consumer. It must instantly bridge the gap between what the consumer wants/needs and what your company can offer to help.

'Sure. but we're not mind readers!'

Fortunately, you don't have to be. While you may not instantly know what a brand new customer needs help with, you can set yourself up for success by analyzing what existing customers have wanted in the past.

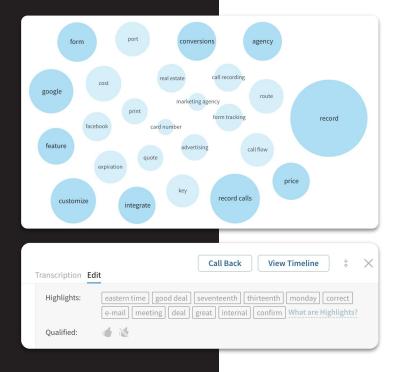
Consider your inbound calls. These are an absolute goldmine. As <u>McKinsey</u> states: "Frontline employees are a company's eyes and ears on the ground. Solicit and collect employee feedback: it will prove useful in gauging how customers are feeling and how daily interactions are changing."

After all, why do customers call your company? Because they have a question and they need your help.

How CallRail can help:

Using tools like <u>Call Tracking</u> ensures that all inbound calls are recorded, while <u>Call</u>

<u>Transcriptions</u> automatically transcribe them — meaning that no piece of customer feedback is ever missed. In fact, one callRail customer increased high-value customer lead-to-conversion rates by 24% using insights cleaned from <u>Call Transcriptions</u>.



Analyze thousands of calls in an instant using our AI-powered <u>Conversation</u>
<u>Intelligence</u> feature (which includes <u>Call</u>
<u>Highlights</u> and <u>Key Terms Spotted</u>
functionality.)

This will unearth common keywords and phrases that are mentioned repeatedly, revealing objections and confusions within your current marketing approach.

Imagine you analyze your calls and see that 41% of call transcripts mention the phrase "business hours." This clearly shows that your customers need help understanding when your business is open — so you should provide this information as clearly as possible going forward. In fact, you should probably consider updating your Google My Business listing.

If you do, you'll make your customers' lives significantly easier. They won't have to call your business, wait in a queue, and speak to an agent just to find out basic information. Potential prospects will quickly find an answer to their question instead of searching for an alternative vendor that tells them what they want to know. As a result, you'll bring in more prospects.

What's more, you'll free up your agents' time and energy to focus on resolving genuinely high-value customer queries — rather than relaying basic business information to callers.

Beyond simply providing basic business information, our <u>Key</u> <u>Terms Spotted</u> feature allows you to unearth even more crucial (and valuable) insights. For example, after reviewing your calls, you find out that most of your callers are asking about Saturday hours but you're closed weekends. With this information in hand, you can optimize your business hours to capitalize on that potential foot traffic to your store.

Likewise, you can redesign your homepage to make your business hours one of the first things that visitors see. This will improve their first impression of your business while also making their lives easier — meaning they don't have to ring up your business just to find out simple information.

"Being able to track campaign performance is vital to our business.
CallRail has further helped develop our campaigns by finding keywords in our Call Transcripts and identifying both objections and confusion within our marketing which let me take the next steps to create a solution."

Ready Responders



Creating a positive first touch will do wonders for consumers' perception of your business. Therefore, they will be more likely to continue doing business with you going forward. However, beyond simply the first touch, you need to make sure that you optimize all future interactions by using everything you know about a customer to make their lives even easier.

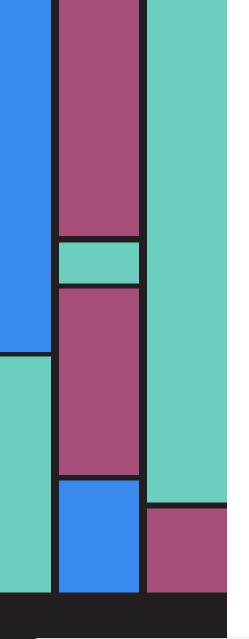
The ultimate goal is to ensure that CX is never a one-time-only deal. If you provide customers with a great CX from the very first touchpoint, they'll keep coming back. If you optimize each of these subsequent visits — leveraging customer insights to make the experience more personalized and more helpful — than their perception of your business will increase further.

In fact, it's been shown that <u>80% of consumers</u> are more likely to buy from a business when they are served a personalized experience.

CallRail's <u>Call Tracking</u> software ensures that you know which customer called, when, and what they were looking for — while <u>Form Tracking</u> does the same for online form submissions. <u>Call Transcriptions</u> make sure nothing is ever missed, while <u>Key Terms Spotted</u> and <u>Call Highlights</u> use Artificial Intelligence (AI) to unearth key insights in an instant.

Knowing who a customer is, what stage of the customer journey they are at, and what they're looking for is the holy trifecta when it comes to CX. With <u>Call Tracking</u>, <u>Conversation</u>
<u>Intelligence</u>, and <u>Form Tracking</u>, you will have this information right at your fingertips, at all times.

Make better first (and lasting) impressions with analytics and communications tools designed to improve customer experience. And, in turn, keep them coming back for more.



2. Communicate with customers on their own terms

Growing competition and a myriad of new technologies mean one thing: organizations increasingly need to meet customers where they are instead of the other way around.

Why is this so important?

These days, consumers have the power to dictate the way businesses interact with them. If you don't give them an experience that they want, on the channels they use, they'll simply go elsewhere.

According to <u>Salesforce research</u>, 40% of customers won't do business with your company if they can't use their preferred channel. This doesn't mean the preferred channel out of the ones you offer — this means their *single preferred channel*.

What's more, these preferred channels vary according to the individual, such as their:

- Personality
- Demographics (with obvious generational differences to consider)
- Connectivity
- Level of tech knowledge

Preferred Channels Span Online and Offline Worlds Customers Who Prefer the Following Channels When Communicating with Companies 64% 62% **6**5% 64% **59**% 59% 56% • 62% In-person 57% 53% ● **●** 58% 56% Online chat/live support 45% 55% 45% 43% 44% 50% 43% Online knowledge bases (e.g., self-service FAQs, searchable libraries) 41% 36% 48% **37**% 36% Online forms **32**% Social media 31% ● ● ● 35% Text/SMS 29% 39% Online communities 30% 22% Millennials/Gen Zers Gen Xers Silents/Baby Boomers

To further complicate matters, <u>78% of customers</u> prefer different channels at different stages of the buying journey.

You can't second guess consumers' preferences and cherry-pick a few channels. To be a leader, you need to have a seamless presence on all communication channels for all your prospects and customers.

Of course, this is easier said than done.

Not only do you need to have all these channels available for customers to use, but you also need to make sure they're optimized — and that your agents can seamlessly manage all customer inquiries, no matter which channel they originate from.

Do your form queries route to just one inbox that only a single employee has access to?

Are your calls logged in an ever-growing, increasingly complex spreadsheet with thousands of data points?

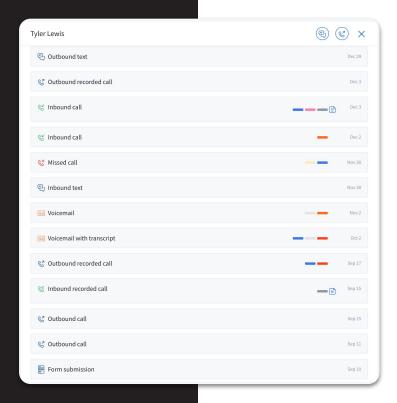
Do agents only deal with live chat inquiries during business hours before logging off for the day — meaning any other chat-based inquiries disappear after they clock off?

Are all texts routed to one single phone number, leaving one employee alone in charge of responding to every inbound text?

Most importantly, are all customer interactions siloed according to the channel? If so, this means you'll never build a complete picture of your customer — you'll be unable to provide them with a holistic, personalized CX.

How CallRail can help:

Businesses need a single source of truth. They need an all-encompassing communication hub that directly links all calls, form submissions, texts, and live chat inquiries to the individual prospect that made them. If agents are to understand who their prospects are, what they're looking for, and how they can help them, they need to see a complete timeline of each prospect's interactions with their company to date.



With Lead Center, all this information is synthesized into one intuitive, easy-to-use communications hub. You can take, make, and manage all your calls, texts, and live chat from a single, centralized communications hub. Plus, it also captures the history of every customer interaction, offering your team context for every conversation.

By making your sales and customer service reps' lives easier, they'll, in turn, be able to provide a better customer experience. How? By spending less time digging around for the right information and eliminating the need for prospects to repeat the same details over and over again.

"Today, I have a complete list of every person who's tried to connect with us. I can scroll down this list [in Lead Center] and pick up voicemail or call them back immediately. As a result, we're not long dropping leads, which is a huge reason why we're doing better this year than last."

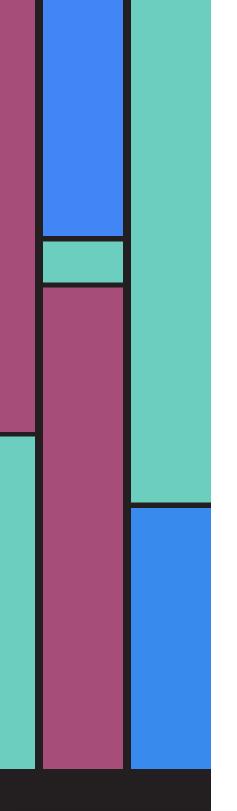
TopJob Asphalt

They will be armed with all the contextual information they need to provide prospects and customers alike with what they need, when they need it.

Missed calls will never again lead to missed opportunities. Every single interaction that prospects have with your company will be logged and flagged (if needed), helping agents resolve outstanding queries with ease.

Communicate with customers via the channels they choose. Lead Center's web-based communications tools and centralized inbox make it easy for you to meet contacts where they are.





3. Level up your response game

Patience might be a virtue — but in today's fast-moving world, consumers' patience is thin.

Why is this so valuable?

We're used to receiving answers instantly, whether via a Google search, firing a question at Alexa, or communicating online with virtual chatbots.

This means that responsiveness is a crucial competitive advantage. Consider the fact that 78% of consumers will buy from the company that responds to them first.

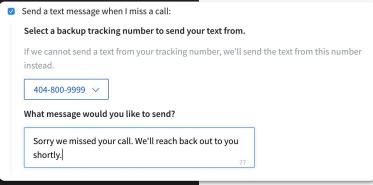
Customers won't hang around patiently while your rep makes themselves a coffee, chats to their colleagues about their weekend, and gets settled in for the day. If they don't receive a quick response, they'll go elsewhere.

By prioritizing lead response time, you will:

- Create a better first impression of your business
- 'Win the race' for turning prospects into customers
- Boost your conversion rates

Offering multiple communication channels (as per recommendation number two) is just the first step. The channels you offer are only as great relative to the speed with which you answer respondents.

There's no point installing an all-singing, all-dancing live chat feature if it takes an hour on average to respond — by that time, the prospect will have long left your site. This doesn't mean customer-facing reps have to be chained to their desks 24/7. Far from it.



How CallRail can help:

CallRail's Form Tracking makes it easy as possible for reps to respond to inbound communication — no matter where they are or what they're doing.



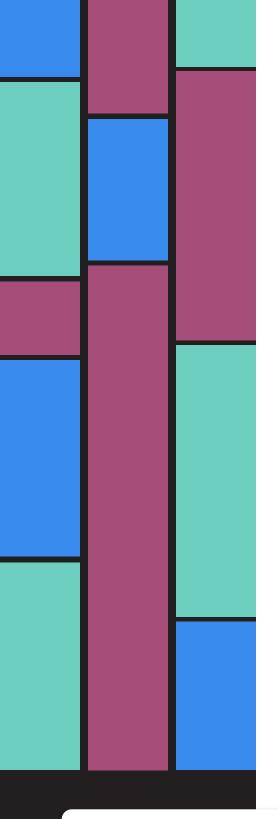
"CallRail has been great with connecting us with our customers and allowing multiple people to answer calls from the same numbers."

Form Tracking features like <u>Quick Response</u> instantly notifies a rep whenever a new message comes in. Reps can also set up <u>Automated Responses</u> with Form Tracking, ensuring prospects automatically receive a templated message confirming that you've received their query, and you'll get back to them ASAP.

With the new Lead Center mobile app, they can even respond while out on the go. These responses will all come from the name number that prospects initially called (if they called versus filled out a form, that is). This means the prospect will recognize the number and will know who's ringing them — increasing the likelihood they actually pick up rather than letting it go to voicemail.

Providing instant responses doesn't have to be hard. With the right tools at your disposal, you can automate as much of this process as possible while ensuring that reps can instantly get back in touch if they're available.

Switch to a business communications and analytics platform that centralizes all customer interactions and leverages easy-to-use automation tools. If you do, your life will become significantly easier—and you'll reinvent your CX for good.



4. Deliver more personalized interactions by accessing each customer's journey at a glance

Modern marketers know just how important following the customer journey is.

Customers have different wants and needs at each stage of their journey. If they're in the awareness stage and are trying to find out more about a business, they'll want to learn all about your features and functionality.

If they're in the consideration stage, they'll probably be more concerned with pricing. Or, if they're an existing customer, they'll likely get in touch for any troubleshooting-related queries.

Providing a killer CX requires understanding where your customers are in their journey, and figuring out what this means for you. In other words, how you can personalize their experience accordingly and help them progress to the next stage of their journey.

Companies need systems that provide a holistic view of all their customers' interactions with their company to date: website visits, form submissions, calls, texts, chat, and more.

This wealth of data makes it easy to connect the dots and directly map customers' behavior to where they are in their journey. In turn, the CX can be personalized accordingly: providing them with what they need at that stage, even if they're not aware that's what they need.

Top Negative Customer Service Experiences

73%

Long wait time to reach an agent

67%

Difficulty navigating the phone system or unable to get a live person

69%

Trouble finding answers on the company website

Difficulty accessing live/human customer support

60%

66%

Asked to repeat information over and over again

Source: Northridge Group

A <u>survey by Northridge Group</u>

found that 60% of consumers cite "having to repeat information multiple times" as a top complaint. Repeatedly explaining who they are and what they're after makes consumers feel like they're just one of a million — instead of a valued individual.

"[CallRail] 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."

Top Job Asphalt

You might be thinking: "Hold up — that's just normal customer service. Of course reps need to ask who they are, what they're calling about, and which products they're interested in. Otherwise, they wouldn't be able to answer their questions."

This is only half right.

Yes, your agents need to know all this information.

Yes, it helps them better serve customers.

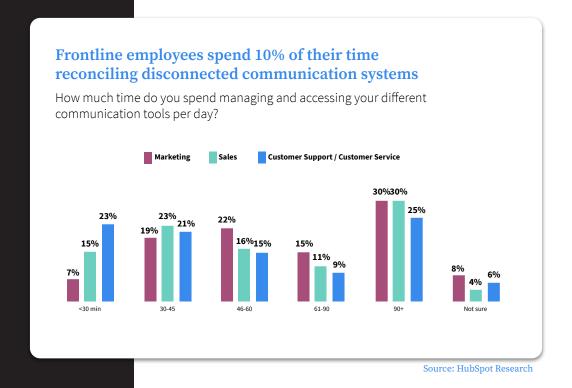
But no, they shouldn't have to ask existing prospects/customers this question every time they speak to them.

Customers will gladly tell you all this information the first time around. As soon as they have to repeat themselves, it screams one thing: "This company isn't listening to me."

The result? They walk away, never to come back again.

Repetition kills customer relationships and sucks up valuable company time. It's as simple as that.

The solution is surprisingly simple — provided you have an all-in-one communications hub. Currently, frontline employees spend 10% of their time reconciling disconnected systems. This time isn't value-add — it's wasted. How much more productive would your employees be if they had all the necessary information in one single source of truth?



How CallRail can help:

One way CallRail can help is with our Lead Center tool. It allows reps to view a complete, cross-channel timeline that shows every interaction a customer or prospect has had with your business. Reps can dive in to see specific call transcripts, leave notes providing more information on the customer's context/pain points/desires, and ensure that they have all need-to-know information at a glance.

But this isn't just interesting to note — it plays a key role in the experience that you serve to these customers. By knowing their context and goals, you can personalize the support you offer and boost your CX in the process.

Not only will customers be impressed by the individual, personalized level of care offered, but they will also view your company as incredibly helpful. In fact, having a firm grasp over each individual's customer journey (and personalizing your support accordingly) can be your business' secret weapon going forward.

Embrace an easy-to-use, easy to set up tool like Lead Center that automatically consolidates all customer interaction data points into a single timeline. This will allow you to understand — and act on — your customer's journey when and where you need to.

5. Extract key insights from your calls to optimize customer service

It's crucial that you get your customer service right.

Why is this so important?

90% <u>of Americans</u> view customer service as a key factor when deciding whether to do business with a company.

But customer service goes beyond ensuring frontline workers are positive, cheery, and receptive. Even the most well-mannered rep can do little to help customers if they lack the right training, information, or tools.

Unsurprisingly, these three areas are all linked.

With the right tools in place, you can unearth key information that will improve your training going forward. Let's dig into how this works.

Imagine you work for a cable provider. An exasperated customer rings your company because their TV suddenly doesn't work. The agent promises to send an engineer out to their home, but for whatever reason, they never turned up.

Now the customer is even angrier.

They call up your company — only the call goes through to a different agent this time. The second agent knows nothing about the caller, so he asks the same questions as they were asked on the first call. This only annoys the customer further, and they tell the rep that they've already been through all this with one of their colleagues.

Embarrassed, the agent tells the customer that they'll put them on hold for a minute so that they can ask their colleague to get them up to speed. By the time the agent returns, the caller has hung up—and is currently searching for new cable providers that will give them a better CX.

How CallRail can help:

By embracing business communications software like <u>Lead Center</u>, you can ensure that these types of embarrassing interactions never happen again.

"With [CallRail's] Conversation Intelligence, I can quickly scan and make sure agents are being polite and giving the right information to customers and leads. It's way more efficient. Today, I'm spending less time monitoring calls and more time serving our Customers — which is the way it should be."

QShark Moving Company

The first agent can automatically qualify a call for future reference. They can leave useful notes regarding the caller's needs, context, and even mood (e.g. unhappy customer — be direct, to the point, and apologetic). Other agents can also dive into the first call's complete transcript if they so wish, helping build a complete picture of the customer's current situation.

This means that when the customer rings for the second time, the agent answering the phone knows:

- Who's calling
- When they last spoke to your company
- The nature of that conversation
- What they need
- What you had promised them
- What the caller is like and how best to communicate with them

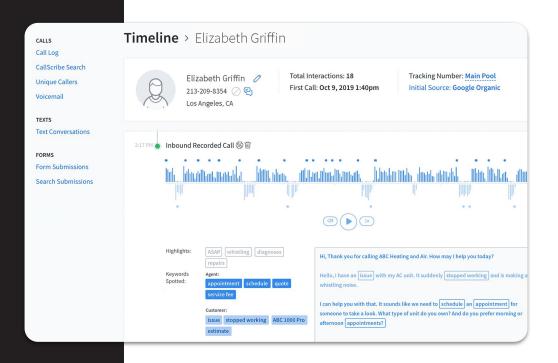
Of course, synthesizing this information in a matter of seconds is a tricky task — especially when you've just picked up the phone. That's where training comes in. With features like CallRail's Whisper Monitoring, managers can listen in to calls as they happen in real-time and offer on-the-spot tips that only the agent can hear.

Not only will this ensure that the customer's needs are being well served, but it also helps consolidate best practices and ensure that agents are following their training to a tee.

These insights are invaluable — even when customers have long put down the phone. With <u>Call Recording</u>, managers can dive into previous calls and analyze reps' performance: revealing key areas that need to be improved going forward and helping managers devise more effective training for the future.

That said, it's not like managers have the time to painstakingly review every single call their agents have made. Fortunately, AI-powered tools (like <u>Conversation Intelligence</u>) allow managers to analyze thousands of calls in an instant. They can immediately see times when their agents made prospects confused or unhappy.

These calls can then be tagged as a 'training opportunity', meaning managers should review the script with the agent in question and go over what they should do the next time around.



Or, features like '<u>Key Terms Spotted</u>' will highlight keywords and phrases that pop up frequently. Agents can leverage these insights to mirror the way that they speak with prospects and customers, thereby increasing trust and aiding communication going forward.

Leverage call transcriptions and analytics tools like CallRail's Conversation
Intelligence to surface insights, save you time, and give you exactly what you need, when you need to improve your customer experience.

How one business transformed its CX with CallRail

By integrating CallRail's full suite of products, <u>Top Job Asphalt</u> <u>transformed their CX</u> — revolutionizing their bottom line in the process.

Let's take a look at this case study in more detail.

The Problem

The company was using two different systems for inbound and outbound calls, which was cumbersome and inefficient.

When calls were missed, Skyler — their Sales Relationship Consultant — couldn't easily access voicemail or get details about those calls. Inbound calls had no caller ID, so Skyler knew nothing about who was calling or why — even if they'd called before.

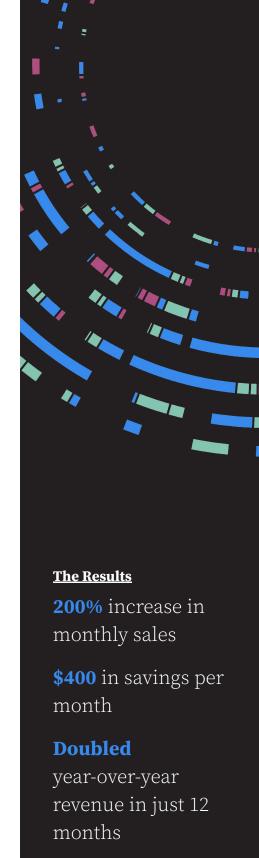
"I had to ask callers a ton of questions to get their contact information, understand why they were calling, and find out which promotion had prompted their call. It was time-consuming and really annoying to people."

The Solution

Having implemented <u>Lead Center</u>, Top Job Asphalt eliminated their desktop phone system entirely.

Lead Center compiles all incoming calls and texts in a single inbox, allowing them to respond to missed messages in a single click. This means no more dropped leads and a faster response time.

Lead Center adds context to every conversation, including vital campaign and source information. When a call comes in they can see at a glance the source that drove the call, and other important campaign details.



150% improvement in

98% faster response

to missed calls

close-rate

Safeguard your future, today

Prioritizing CX is the only way businesses can fend off the competition, attract, convert, retain customers, and protect their future. In fact, COVID-19 has further increased the gap between CX experts and laggards.

Consumers are pickier than ever before. They have more options to choose from and are no longer constrained by factors like their physical location. If they have a single negative experience with your company, they will simply go elsewhere.

While this poses a significant challenge to businesses, it also represents an unmissable opportunity. Companies that make an ongoing commitment to analyzing and optimizing their CX will see their revenue and reputation grow beyond belief.

But if you fall behind for just a second, you might never catch up.

Fortunately, putting your CX first isn't as hard as you might think. With the right tools in place, you can:

- 1. Create a seamless experience from the first touch to the last
- 2. Communicate with customers on their own terms
- 3. Level up your response game
- 4. Deliver more personalized interactions by accessing each customer's journey at a glance
- 5. Extract key insights from your calls to optimize customer service

There is no time to waste. If your CX is lacking, you're losing leads by the minute. You need to plug that gap right now or risk your company's entire future.



Ready to transform your CX? Good.

Get started with a 14-day <u>free trial</u> and see the wide-ranging impact CallRail can have on your business, from providing Call Tracking capabilities to offering a robust omnichannel business communications hub.

If you're already using CallRail Call Tracking, however, then you're one step closer to elevating your customer experience. Go a step further by seeing how else you can power up your account with a 14-day <u>free trial</u> to all the tools we have to offer.

Start Free Trial →

