

2024

Buyer's Guide to Lead Intelligence



Amy Willis
Amy.Willis@email.com
216-999-0582
Source: [Google Ad](#)

Call Summary

Inbound Call on Feb.6 4:44pm

Caller wanted an appointment for Friday. Rep asked for details about the appointment and location. Appointment scheduled with field rep.

Inbound Call on Jan.2 2222 5:32pm

Overall sentiment



Positive



Neutral



Negative

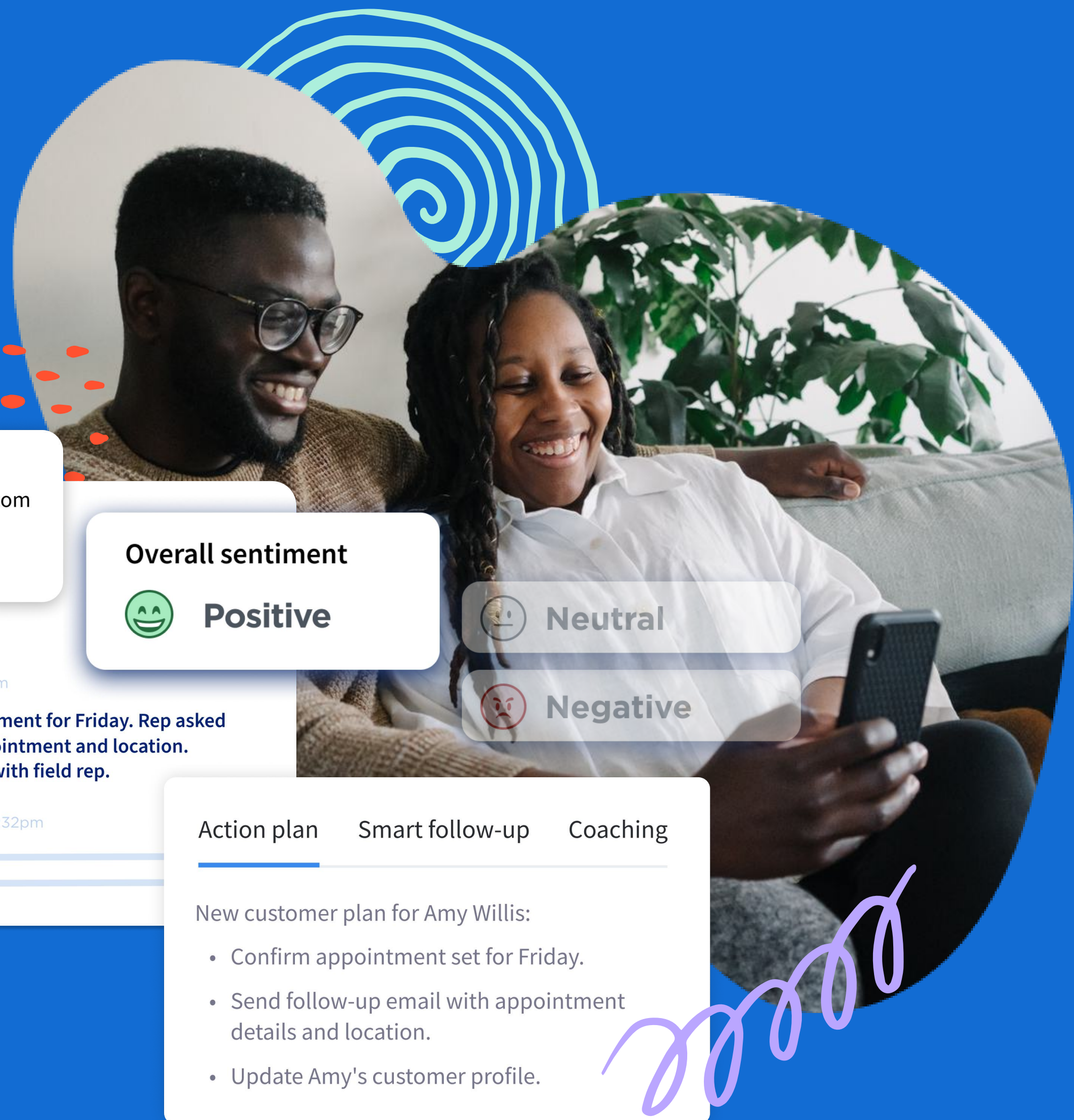
Action plan

Smart follow-up

Coaching

New customer plan for Amy Willis:

- Confirm appointment set for Friday.
- Send follow-up email with appointment details and location.
- Update Amy's customer profile.



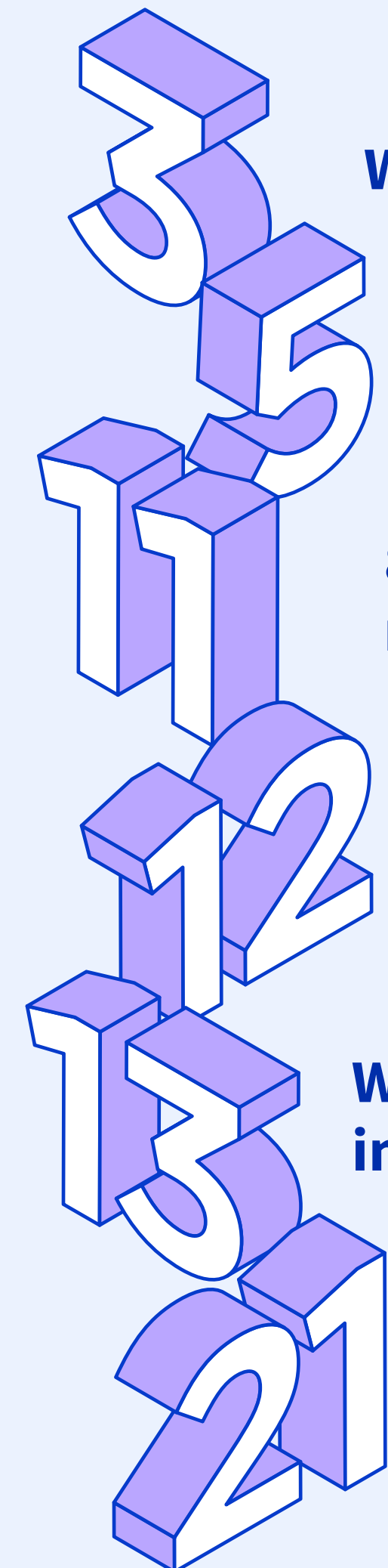
Introduction

CallRail provides businesses and the agencies that serve them with lead intelligence — before they even pick up the phone. With lead intelligence software, businesses can attract more high-quality leads, convert those leads into customers, and optimize their marketing strategy in the process.

CallRail's Call Tracking lets you track what marketing is driving calls, texts, and forms as easily as you track clicks. Get the metrics you need to spend smarter on everything from paid search to print ads in one easy, powerful dashboard. Leverage our AI-powered Conversation Intelligence® to automate insights, better understand your buyer, and win the sale. Lean on Convert Assist to quickly convert more leads and deliver higher-quality customer experiences with smart follow-up, automated action items, and personalized call coaching.

Businesses that use CallRail can market with confidence. As you look into lead intelligence tools, use this roadmap to evaluate and assess which tools best suit your needs.

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Why businesses need CallRail

Most companies spend, on average, **9% of their revenue on marketing activities**. However, many businesses still struggle to get the most out of their ads, keywords, and marketing campaigns to ensure they spend their budget in the best place.



You are looking to make the most of every marketing dollar.



You want to understand the entire customer journey.

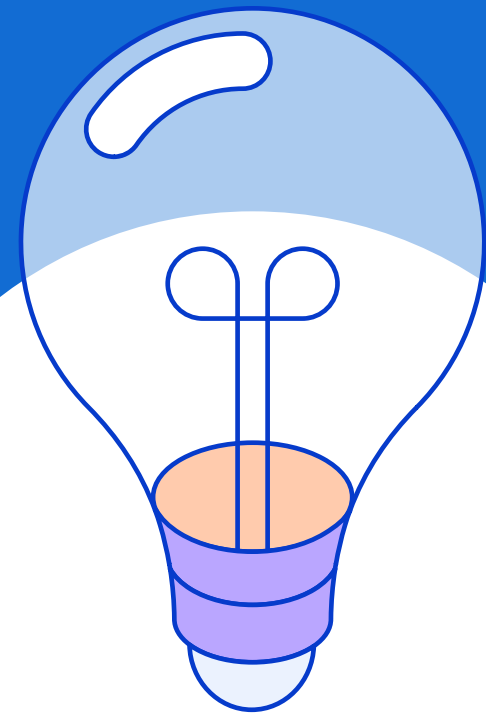


You need a tool to track, analyze, manage, and communicate with opportunities from a single platform.

Why businesses need CallRail



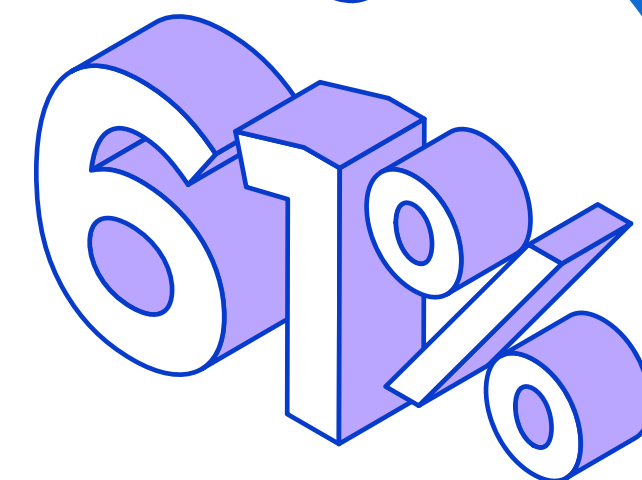
of marketers believe data-based decisions are more effective than gut instincts.



But only...



**of senior-level marketing leaders feel analytics inform their decisions.
And...**



of marketers do not use ROI when making strategy decisions because they aren't confident in their own data.

“ CallRail is a seamless plugin that has elevated our digital campaigns. With form and call tracking, our clients are able to discover key indicators to improve ROI. ”

“ Callrail helped me accurately track calls and make data-driven decisions that increase ROI. ”

“ Callrail's ability to route, track and analyze calls has been a major game changer for me. ”

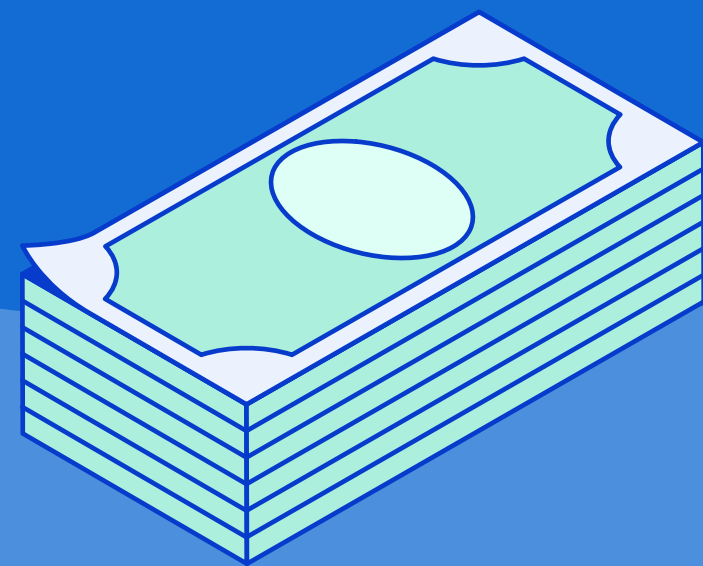
Where CallRail makes a difference

CallRail delivers proof that a business' marketing efforts are driving leads. This is especially helpful for businesses that rely on phone calls and web forms to capture leads.

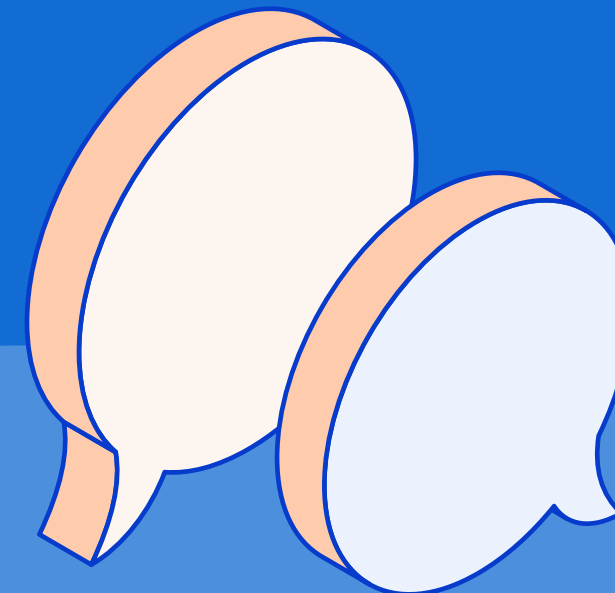
How CallRail improves marketing performance:



Track what is working and what isn't.



Make better use of marketing dollars.



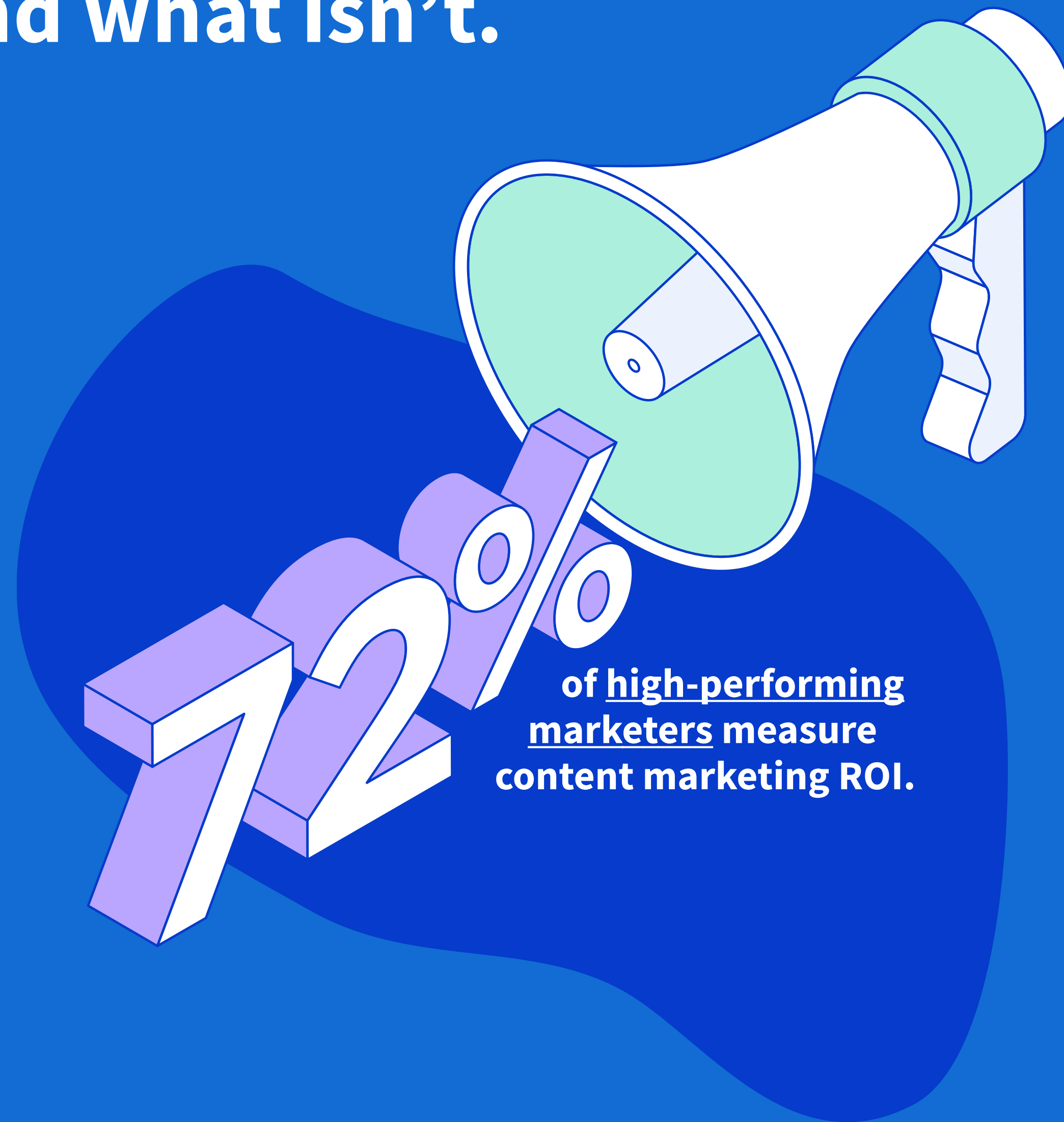
Improve customer conversations.




Track what's working and what isn't.

Whether online or off, businesses can trace incoming calls back to the campaign, ad, or exact keyword that prompted the initial interaction. This allows you to understand what campaign efforts are working and which ones aren't, equipping you with the insights you need to optimize your budget and put more cost and energy into your most effective campaigns.

Marketers can build a robust data collection, including a caller's name, number, and location. They can store call recordings and transcripts, and even build a visitor timeline that includes a roadmap of every interaction between a caller and your marketing content, including your sales interactions.



of high-performing marketers measure content marketing ROI.




In addition to tracking which marketing drove the call, chat, or form fill, CallRail also offers patent-pending self-reported attribution to extract even greater insight into each lead's journey. Whether you ask your leads, "How did you hear about us?" or they offer the answer unprompted, AI-powered self-reported attribution, available with CallRail's Premium Conversation Intelligence, will understand and report on whether they saw your yard sign, heard about you on a podcast, or even were referred by a friend.

This data, used alongside your software-based attribution data in CallRail, will eliminate blindspots, and enable more confident and accurate marketing decision-making. Marketers will no longer wonder what drove leads to search or call, they will know what put their business on each lead's radar and what marketing converted them to ultimately reach out.

With attribution reporting as a cornerstone of your call tracking capabilities, outlining the different touchpoints callers engage with — from first interaction to closed customer — becomes a breeze.

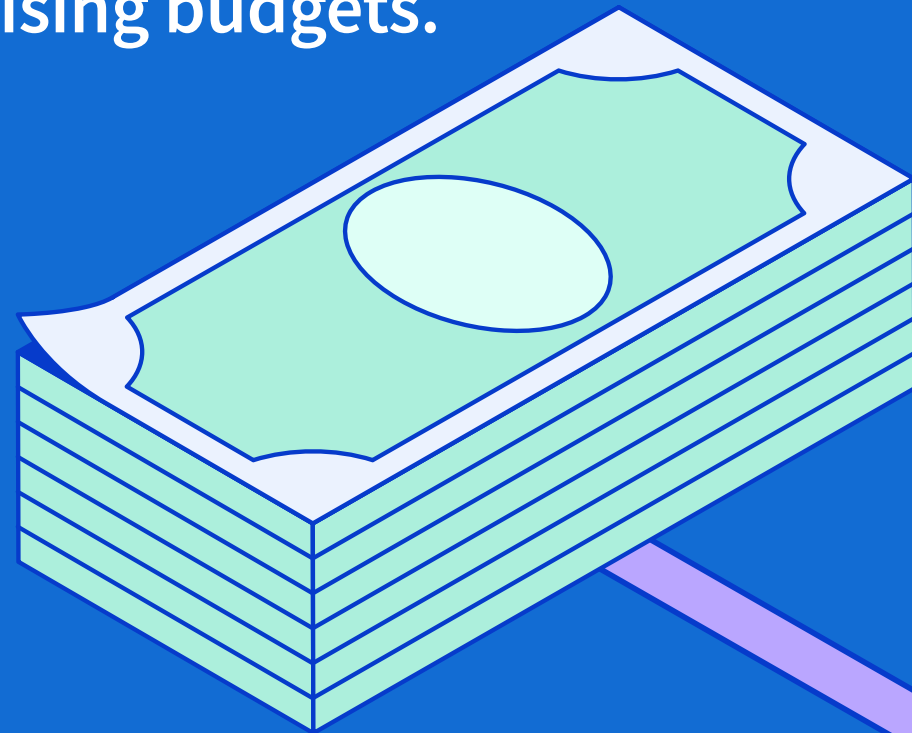
“ A game changer for our business. CallRail makes it easy for our company to track calls, view ROI, and several other key metrics in one organized place. ”



Make better use of marketing dollars.

By collecting data about what piques a contact's interest and what falls flat, marketing teams can invest in optimizations, personalize campaigns, and cut costs everywhere else.

This means you're able to reduce cost per lead by 20%, close customers more effectively, and improve the ROI of your marketing and advertising budgets.



Campaigns that use interaction data to personalize for a business's ideal customer see

**5-8
TIMES**

the ROI for their campaign spend.

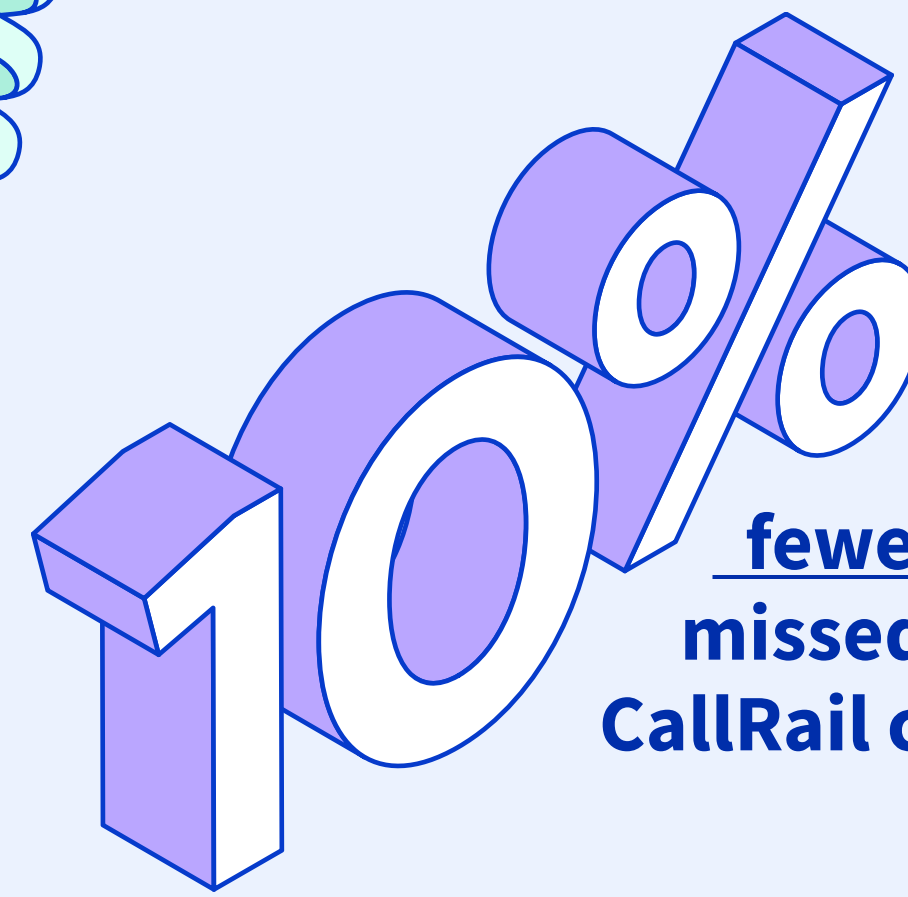
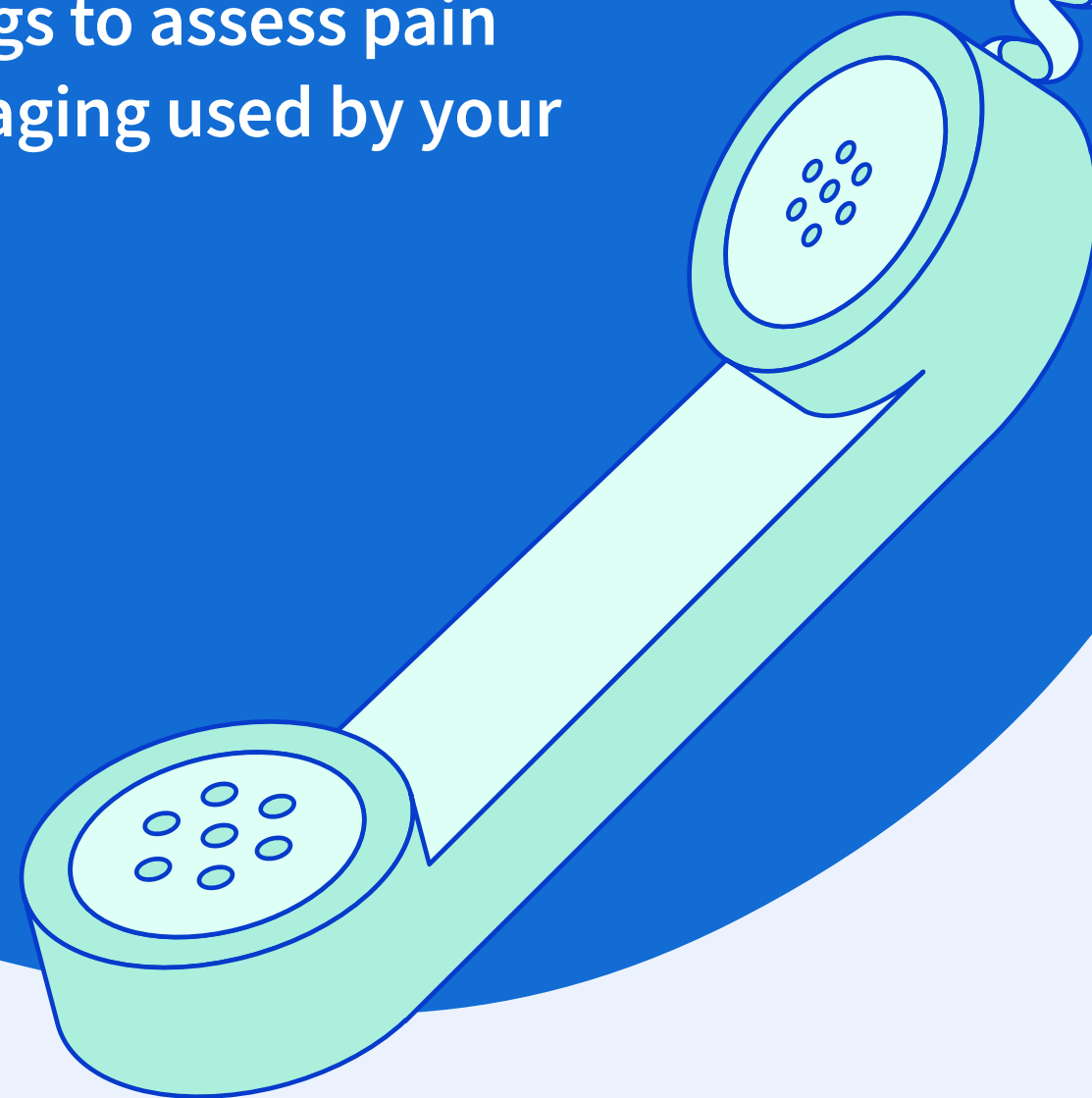


“ CallRail is super easy to use, set up, and integrate into my tech stack for call tracking. I recommend it to all of my clients (if I give them a choice) because of the value it delivers. I've used it for about a decade with Enterprise-level clients as well as small, local businesses. ”

Improve customer conversations.

Busy businesses often miss phone calls or have subpar interactions with customers on the phone.

Call Tracking aggregates call-to-answer times, call lengths, call outcomes, and survey feedback to ensure you deliver the best possible experience. Beyond improving the customer service experience, you can also use this information and call recordings to assess pain points and improve the messaging used by your sales and marketing teams.



fewer lost opportunities from missed calls are experienced by CallRail customers.

Understanding where your callers are coming from and what they're asking helps you improve your interactions to make the most of every opportunity.

In addition, CallRail doesn't just benefit you; it enhances your customers' experiences too. Every interaction with your business is backed by solid knowledge and data acquired through conversation intelligence, helping you exceed expectations and build trust from the very first contact.

Check out some of CallRail's AI-powered features that can improve your customer conversations:

CALL SUMMARIES:

Automatically receive three-to-five-sentence snapshots of every customer conversation. Filter them to pinpoint trends you can use to improve service, support, and marketing performance.

SENTIMENT ANALYSIS:

At a glance, determine whether your team's calls with customers are positive, negative, or neutral. Then, immediately identify opportunities for course correction, coaching, and recognition.

QUESTIONS ASKED:

You can use these insights to identify where customers are confused and augment your marketing messaging to help your customers make crystal-clear decisions.

CALL COACHING:

AI-powered call coaching analyzes your team's calls in real time and delivers timely, personalized feedback. For each call, it summarizes what reps get right and identifies areas for improvement.

ACTION PLAN:

Conversation Intelligence uses AI to analyze conversations and surface up to five recommended next steps faster than you can tap "play" on a call recording.

SMART FOLLOW-UP:

When a customer is on the fence, don't waste time crafting follow-up emails or texts. Our AI will do it for you — automatically.



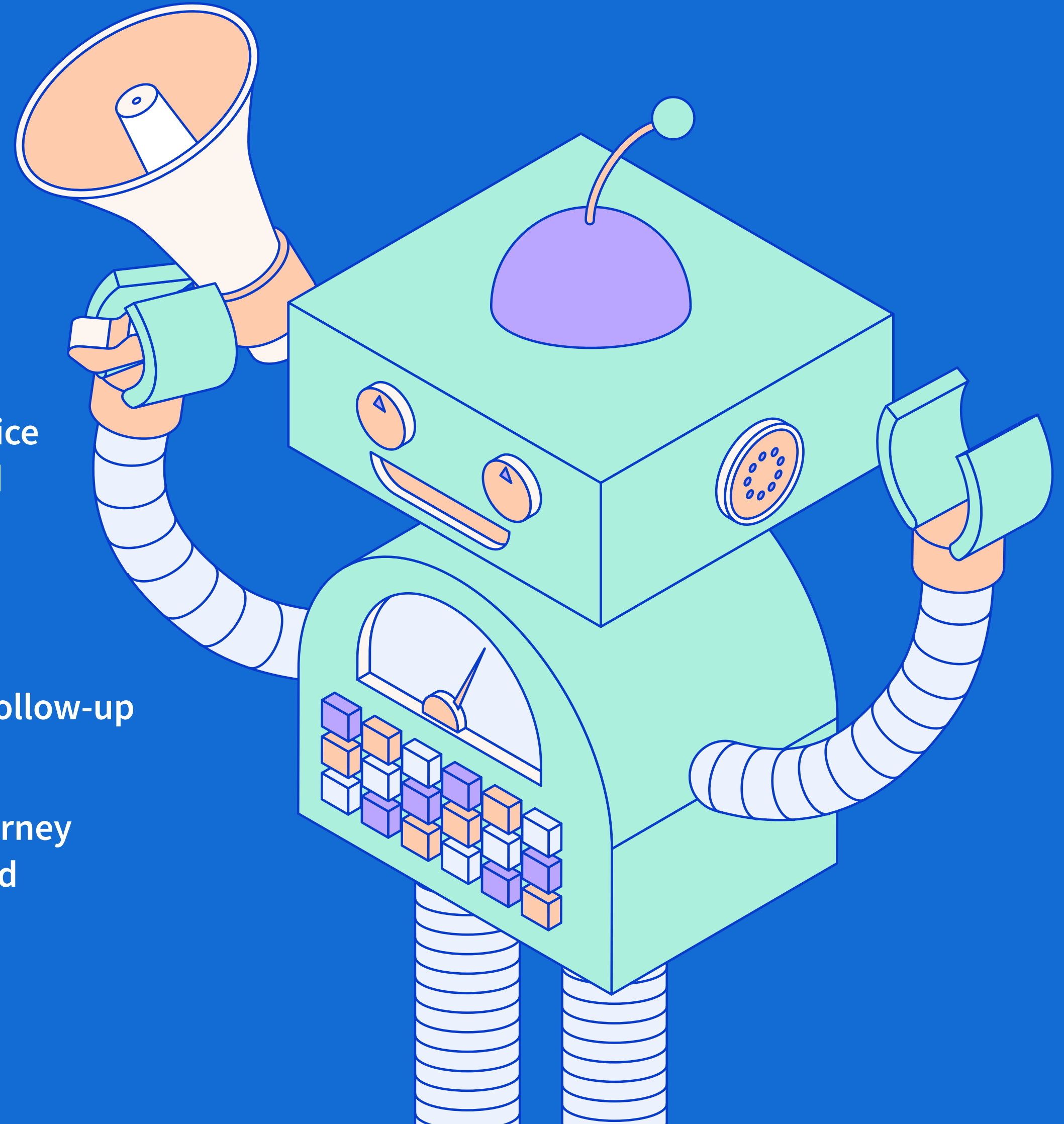
SELF-REPORTED ATTRIBUTION:

Remove any attribution assumptions and implement AI to tell the entire story of how your leads turn into lifetime customers.

8 ways AI can take your marketing to the next level

- 1 Provides a clearer view of marketing performance with self-reported attribution
- 2 Enhances the customer experience with transcription and summary review
- 3 Improves conversion rates with call sentiment reports
- 4 Optimizes marketing strategy by spotting new keywords or lead gen opportunities

- 5 Boosts efficiency with call summaries
- 6 Elevates customer service quality with automated call coaching
- 7 Turns more leads into customers with smart follow-up
- 8 Keeps the customer journey moving with AI-powered action steps



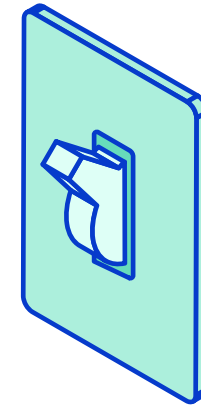
Common features of CallRail that marketers love

“ Callrail's ability to route, track and analyze calls has been a major game changer for me. I love Callrail's intelligent summaries and the verbatim text conversions from speech. I can now simply read the summary for a quick QA, or search a keyword to locate the part of the conversation needing to be referenced. ”

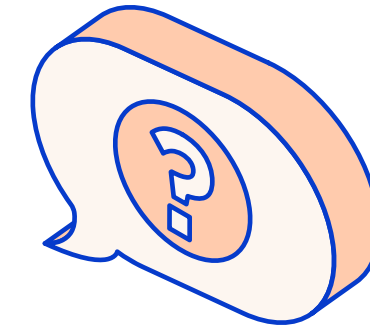
“ For my business, the ability to track the source of every call, mark leads as valid/invalid, and listen to or read transcriptions from recorded calls is a key part of the process of improving and refining our marketing and sales strategies. I like [that] I'm able to easily setup and manage the features I need to use with minimal tech support and the reporting functions provide most of the high level data I need to mine. My company uses this system all day, every day. ”

- [Call Transcriptions](#)
- [Automation Rules](#)
- [Multi-Language Transcription](#)
- [Call Summaries](#)
- [Call Sentiment](#)
- [Reporting](#)
- [Analytics and Other Integrations](#)
- [Static/Offline Call Tracking](#)
- [Google Ads Call Tracking](#)
- [Call Recording](#)
- [Visitor Tracking](#)
- [Artificial Intelligence \(AI\)](#)
- [Dynamic Number Insertion \(DNI\)](#)
- [Multichannel Lead Attribution](#)

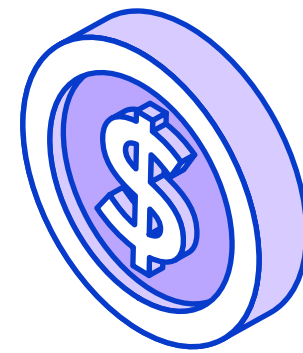
What to consider when investing in lead intelligence software



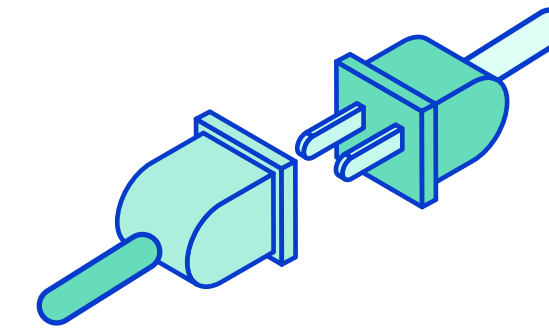
Ease of Use



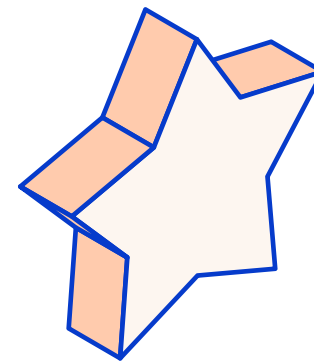
Customer Support



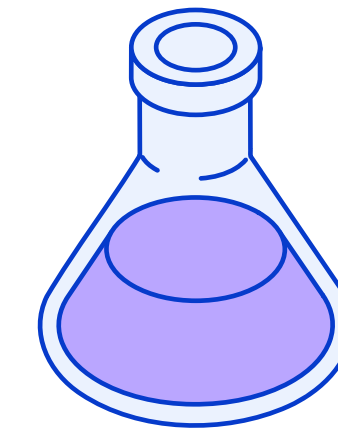
Price



Integrations



Additional Features



Innovation

**Ease
of Use**

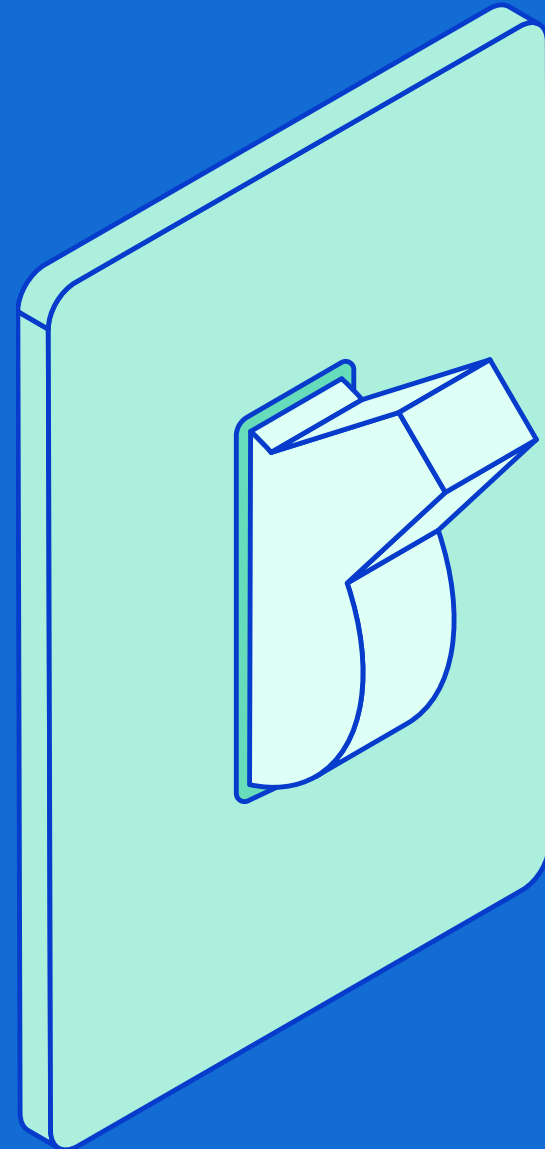
Price

Additional
Features

Customer
Support

Integrations

Innovation



Ease of Use

Choose a call tracking platform that streamlines marketing strategy analysis. Look for platforms that help you manage calls, ads, customer interactions, and keywords more efficiently. You should be able to easily locate lead information including names, numbers, and locations.

90%

of CallRail users go live in less than one month

... of that 90%

57%

of CallRail users go live in less than one day.

Ease
of Use

Price

Additional
Features

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Support

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Innovation

Price

Pricing doesn't have to be prohibitive.

Over 200,000 users choose CallRail because the price is well worth the outcomes they receive. Having separate tools for call tracking, customer management, agent training, marketing analytics, etc. adds up quickly. CallRail provides these features and more in a customizable package for an accessible price.

An investment in your tech stack is an overall investment in your marketing strategy, so why not use a tool that tracks your marketing, provides in-depth customer insights, and seamlessly integrates with the other tools you already use?



With
CallRail,
users can see
ROI in less than

ONE
MONTH

For a small monthly fee, you can track which campaigns, ads, and keywords drive the most calls, form-fills and texts.

[See details here.](#)

Ease
of Use

Price

**Additional
Features**

Customer
Support

Integrations

Innovation

Additional Features

CallRail's tracking tools go beyond data collection and improve your communication strategies with call recording, outbound call tracking, call notifications, and text message facilitating and monitoring. We recommend looking for a solution that also provides complimentary features built for usability.

You should be able to review call transcripts with artificial intelligence analysis, and link sources, campaigns, and outcomes to all leads.

CallRail's seamless platform delivers the tools you need to make smarter marketing decisions, drive more quality leads, and turn leads into customers. Gather insights, take action, and grow your business.

CallRail's suite of products that complement call tracking:

★ Conversation Intelligence

★ Convert Assist

★ Premium Conversation Intelligence

★ Form Tracking

Ease of Use

Price

Additional Features

Customer Support

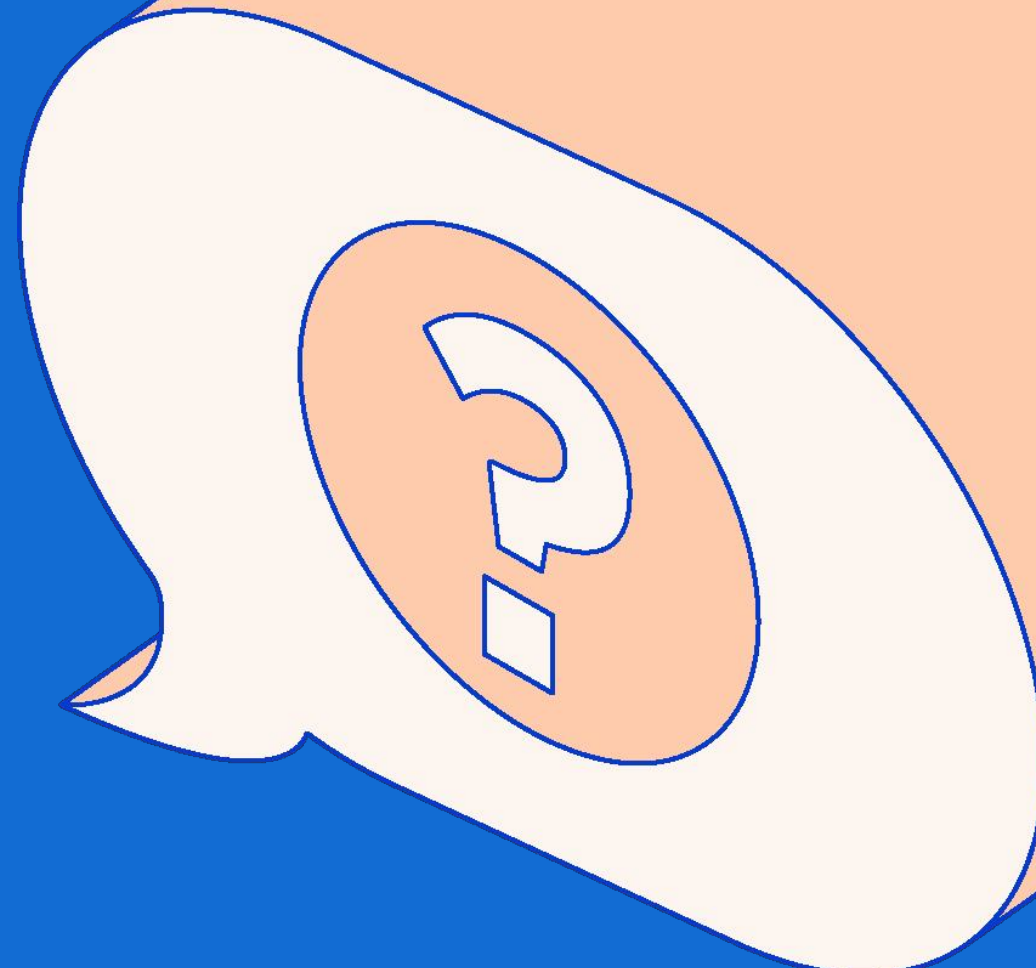
Integrations

Innovation

Customer Support

When you buy a new tool, you aren't just buying software. You are also hiring a team to help your business grow.

Your new partner should be easy to work with, provide top-notch customer support when you have questions, and offer meaningful interactions with your team to improve your experience with the tool.



CALLRAIL'S RANKINGS FOR CUSTOMER SUPPORT:

EASE OF USE

92%

EASE OF SETUP

91%

SUPPORT QUALITY

91%

Ease
of Use

Price

Additional
Features

Customer
Support

Integrations

Innovation

Integrations

With over 50+ sales and martech integrations, you can put your marketing and conversation data to work across your team's favorite apps. Gain more insights and capabilities, such as mobile optimization, data visualization, search advertising, web analytics, workflow automation, and social media advertising.

CallRail customers' favorite integrations:

- Google Ads
- Google Analytics 4
- Google My Business
- Bing
- Facebook
- HubSpot
- Unbounce
- Zapier
- Salesforce
- VWO
- Jobber
- Clio
- MyCase
- Mailchimp

Ease
of Use

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Innovation

CallRail tirelessly works to stay on the cutting edge of lead tracking technology, especially when bringing AI into the picture. Not only does CallRail consistently innovate, but customers are encouraged to be a part of that innovation, testing out new features and providing crucial feedback.

That's why we created [CallRail Labs](#).



CallRail Labs is open to those who want to experience the latest tech before anybody else. It's where like-minded innovators experiment with cutting-edge AI and shape the future of CallRail's most advanced products and the way they work.

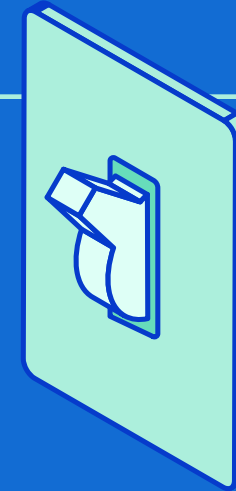
When a feature is well-received, CallRail implements that feature into our products permanently. Features like questions asked, self-reported attribution, and call coaching started out as a CallRail Labs experiment, and thanks to thoughtful feedback from customers, these features – and more – are now permanently available in CallRail products.

CallRail is committed to innovation and frequently collaborates with fellow innovators and marketers to continue providing a one-of-a-kind experience that leads to marketing success for our customers.

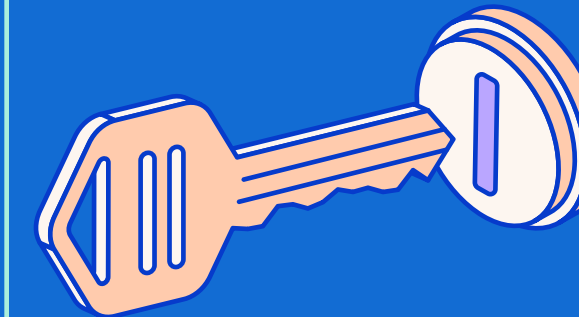
Competitor Comparisons

The decision to invest in marketing tracking and analytics tools often comes down to whether or not it offers the right features and functionality for your business at a reasonable price. G2 evaluated the qualities marketers need and how the current market stacks up.

When compared to top competitors (CallTrackingMetrics, Marchex, Invoca), CallRail leads in:



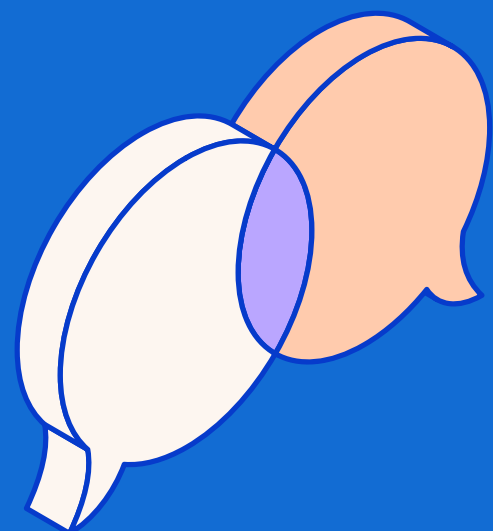
92%
EASE OF
USE



91%
EASE OF
SETUP



92%
EASE OF
ADMIN



91% LIKELIHOOD
TO RECOMMEND



91% QUALITY
OF SUPPORT

Competitor Comparisons

CallRail users report high levels of satisfaction with integration, ease of setup, and ROI potential.

With the ability to go live in under **one month**, CallRail customers see ROI in **less than eight months**.

“ We switched to CallRail from a different service provider. CallRail is simple for small businesses and can be scaled for larger organizations. It's easy to navigate and provides a ton of data to tie calls back to a source. You can also set up several different tools to monitor call quality, topics, etc. ”

“ I haven't seen a call tool that is as easy to use with such comprehensive data. This makes it easy to report CallRail findings to clients. ”



Bridge the gaps in your data and strategy

Maybe your marketing strategy lacks clear analytics and you are looking for visibility, or perhaps you have marketing analytics, but are finding severe gaps in them. CallRail offers invaluable information about where your leads are coming from, so you can **market with confidence**.

CallRail has a proven record as a market leader. CallRail has been the #1 ranked Inbound Call Tracking product on G2 since 2018 and continues to exceed customer expectations in call transcription, conversation tracking, customer service, and enhanced analytics —all powered by artificial intelligence.

[Start my free trial](#)

