

5 ways to spring clean your marketing (and get better results)

Disorganized call data, missed follow-ups, and unclear lead sources can quickly tangle your marketing efforts — and cost you opportunities. But cleaning up doesn’t require a full overhaul. CallRail gives you clarity and control to streamline attribution, automate follow-ups, and keep leads moving from first touch to closed deal. With AI tools built in, you can simplify your sales process and focus on what drives revenue.

Ready to clear the chaos? Start by freshening up these five areas:



Action Plan	
1. Confirm the customer's zip code earlier in the call to determine coverage area.	
2.	
3.	

Summary Transcription

Homeowner sought assistance for remodeling project. Details were requested about the scope of work and budget. Appointment scheduled for next Thursday.

1. Throw away time-wasting manual reviews of calls

Use call transcripts and **summaries** to see key details at a glance. In just a few sentences, you’ll get the insights you need to market smarter and put ideas into action faster. In addition, our **Multi-Conversation Insights report** highlights weekly trends and takeaways across hundreds of calls, giving you a clear big-picture view to guide better decisions.



Bonus power-up with Convert Assist: Get a clear action plan after every call so you never miss key opportunities. Whether it’s scheduling a follow-up, sending a proposal, or prioritizing hot leads, automation keeps you ahead. Set up call notifications and have your action plans land right in your inbox.

2. Clean up your keyword strategy and uncover new opportunities

Automatically track the keywords and phrases your prospects mention on calls — no more manual reviews. CallRail surfaces them in the **Key Terms Spotted report**, so you can easily spot which terms drive engagement and fine-tune your campaigns.



Plus, **call highlights** help you cut through the clutter to find the most relevant words and phrases from your calls. This will help you refine your call scripts and talk tracks to improve your calls and the overall customer experience. It can also help you find new opportunities by flagging relevant words and phrases you might not be tracking yet, such as requests for services you don’t currently offer.



3. Toss out time-consuming manual tasks with smarter automation

Manually classifying or categorizing interactions wastes time, drains resources, and invites human error. With **automation rules**, you can qualify leads in just a few clicks using predefined templates, including industry-specific options to automatically tag calls and form submissions based on relevant terms.



Bonus power-up with Convert Assist: With manual classification out of the way, keep top leads engaged with smart follow-up. These ready-to-send, personalized responses let you reconnect via email or text in seconds. Faster engagement, higher conversion rates, and no manual drafting.

4. Refresh your perspective with call sentiment insights

Call sentiment insights save you time and give you a clearer picture of customer and agent interactions. Quickly spot positive and negative trends without manually reviewing every call. Use sentiment data to reinforce good practices and identify where additional training is needed.

Coaching insights

Positive

- Instructions were clear
- Explained all options thoroughly

Needs improvement

- Give customer your direct contact information
- Ask customer to repeat instructions back



Bonus power-up with Convert Assist: If negative sentiment is detected, tap into call coaching to pinpoint areas for improvement, making it easy to guide your team in the right direction.

5. Sweep away attribution doubts and make smarter marketing decisions

Stop guessing what’s driving your leads. CallRail’s AI-powered **self-reported attribution**, part of **Premium Conversation Intelligence™**, categorizes leads based on what callers say across more than a dozen sources, like return customers, signage, direct mail, social media, and personal referrals. Combine this with your software-based attribution data to eliminate blind spots and confidently optimize your marketing.

Hi, is this Griffin Law Group? You represented my neighbor in their injury case from a car accident and I'm interested in scheduling a consultation for my injury from a recent car accident.

Amy Willis
Source: **Organic Search**
Reported Attribution: **Personal Referral**

Ready to start spring cleaning?

Start your 14-day free trial of **Premium Conversation Intelligence** and **Convert Assist** today!