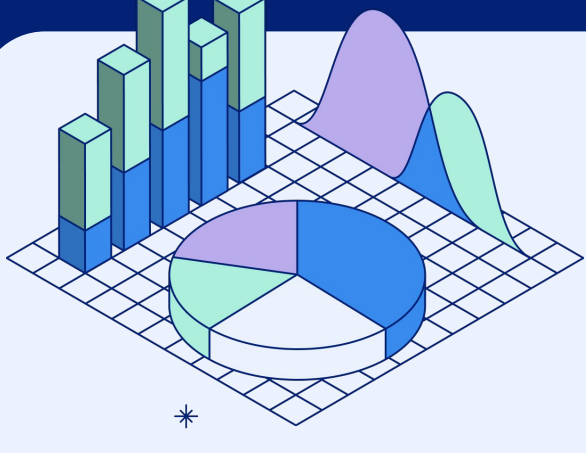
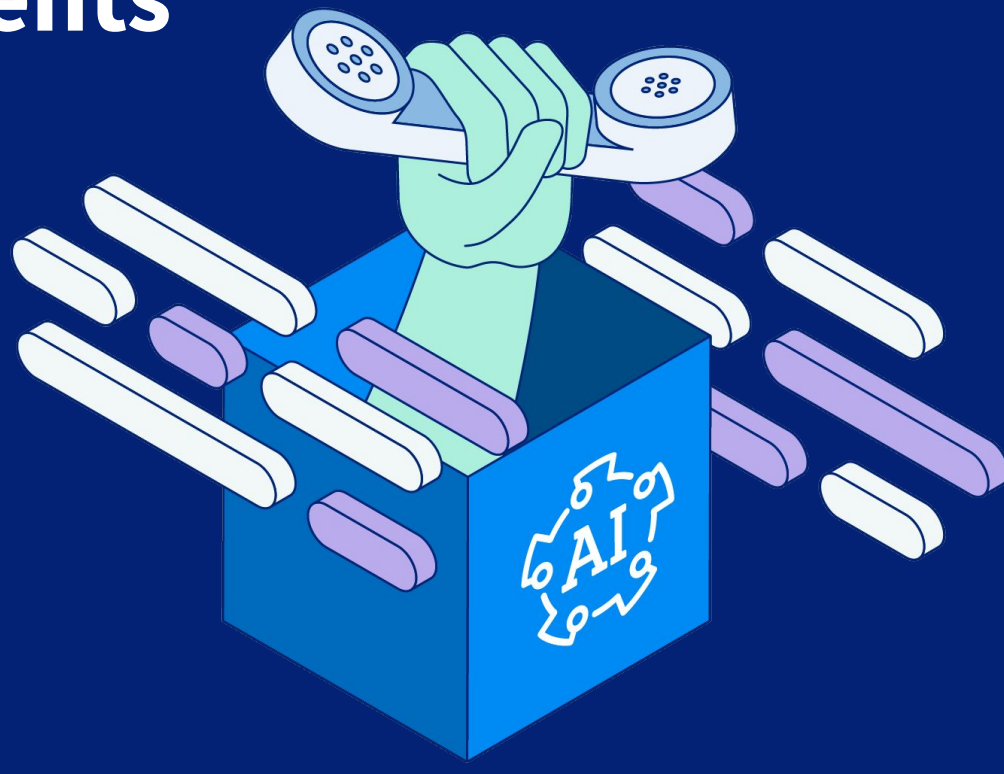


6 ways to get your clients ready for AI in 2024

For marketing agencies, Call Tracking is an essential tool to help clients see which marketing campaigns are driving the most leads. But your clients could be getting even more insights in the new year with the help of AI. Not only can AI help your clients be more efficient with their marketing – it can position your agency as a strategic partner when you help them use AI effectively.

For instance, AI-powered tools that automate call insights can give you and your clients valuable intel about the quality of their leads. With that information, you can help them fine-tune their marketing budgets, lower their cost per lead, and improve ROI.

Here are 6 ways you can help your clients get ready to make the most of AI in 2024:



1. Understand your clients' KPIs and goals

It's important to start the new year in sync with your clients' aspirations. Better communication leads to better outcomes, happier clients, and long-lasting relationships.

Take a moment to document important targets for each of your clients.

2. Make sure your clients' Call Tracking setup supports their marketing goals

Determine what kinds of data will inform your clients' goals and make sure the right tracking and reporting are set up to support them.

Check that your clients have source tracking, call routing, menus, website pools, and dynamic number insertion (DNI) set up by following this checklist.

- Set up unique tracking numbers for each marketing campaign you want to track.
- Ensure tracking numbers are forwarded to your clients' main business phone.
- Create a website pool to identify the unique leads that land on your clients' websites.
- Install CallRail's JavaScript snippet onto your clients' websites to track lead sources.
- Set up notifications for calls and texts to your tracking numbers and lead activity summary emails.



3. Integrate CallRail with essential tools to gain better insights

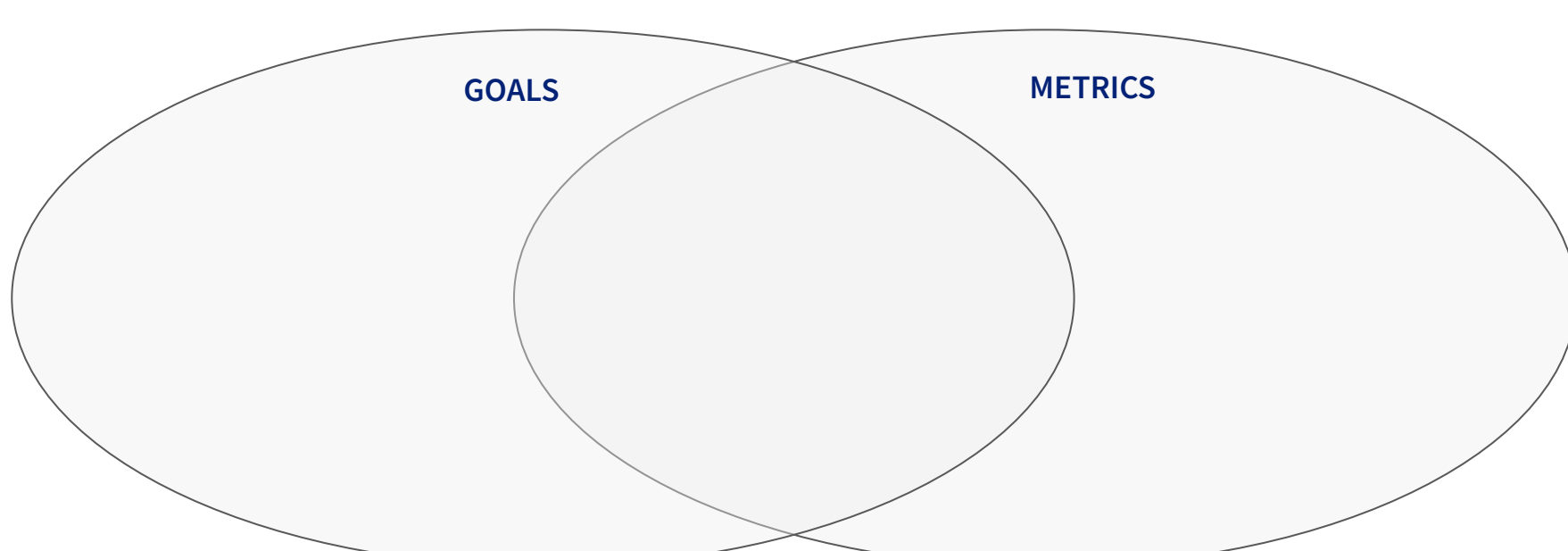
Make sure your clients' CallRail data appears in all the right places, including CRMs and booking systems. Integrating call and Conversation Intelligence (CI) data into platforms like HubSpot, Google Analytics, and others can also improve visibility and efficiency.

Start by listing client technologies that should be integrated.

4. Use AI to understand marketing campaign results

Check AI-powered insights to see whether conversions are actually translating to revenue for your clients. AI makes the process of reviewing call data fast and painless. Look for overlap between your customers' goals and the metrics you're driving.

Add your customer goals into one circle and the metrics you're driving in the other circle. Which of these overlap?



5. Improve lead quality by following critical signals

Be on the lookout for signs of prospect and customer sentiment, feedback, and intention. AI-powered Premium Conversation Intelligence can detect negative sentiment and analyze keyword usage to see if callers are mentioning the right products or services. Better yet, you can get more from your marketing budget because you don't have to wait for a campaign to finish to conduct a post-mortem.

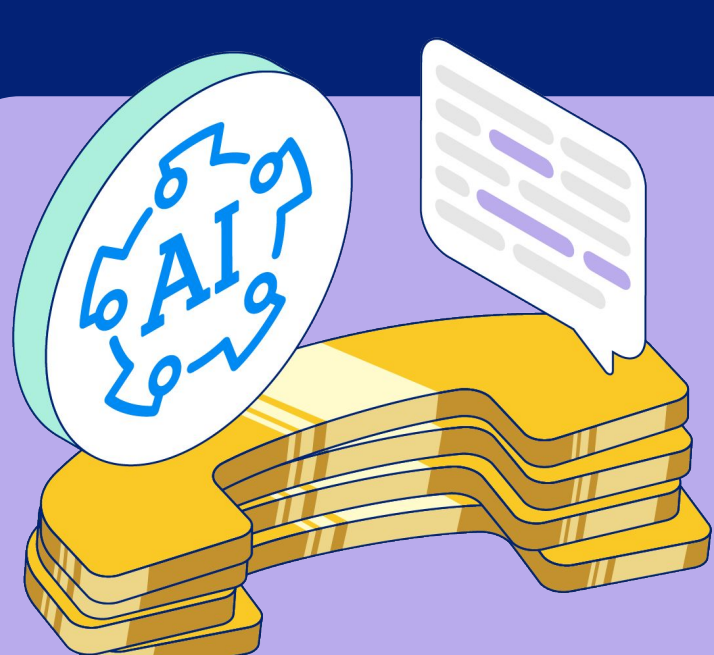
Use this space to list keywords and phrases to flag in customer interactions.

6. Plan for the future

Premium Conversation Intelligence constantly pulls insights to use for creating future campaigns, updating sales pitches, and optimizing customer conversations. By anticipating trends and sharing those insights with your clients, you can be more than a marketing agency – you can be a strategic business consultant.

Add keywords, trends, or other insights that inspire new ideas.





Get clients ready for greater use of AI in 2024 by using CallRail's Conversation Intelligence.

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