

CallRail

How 215 Marketing saves 3 hours a month on reporting



Learn how a Philadelphia-based marketing agency reduced cost per lead and increased overall lead volume for its clients by integrating CallRail with HubSpot.

Tech Stack:

- Call Tracking
- Form Tracking
- Premium Conversation Intelligence™

Integrations:

- HubSpot

Hard-to-compile data compels agency to unify lead tracking and automated workflows

As a performance marketing agency, [215 Marketing](#) helps clients improve and grow their brands through consulting, advertising, outreach, SEO, social media, and email marketing. Their team of marketers relies on campaign data to see where to continuously optimize their efforts and create better results for their clients.

215 Marketing serves various clients but specializes in B2B and franchise companies. They are both a [CallRail Agency Partner](#) and a Platinum HubSpot Solutions Partner, with clients located across the country. This combination allows 215 Marketing to provide more efficient workflows and comprehensive analytics to their clients and helps them clearly demonstrate the value of their work.

“We’re upfront with our clients and always tell them that in order to fully track advertising, we need CallRail and we need HubSpot for the attribution side, tracking things so we can tell you exactly who came from ads.”

–Mikayla, Growth Marketing Manager at 215 Marketing



Challenges

Incomplete attribution and time-consuming reporting

215 Marketing’s clients wanted to know the results and ROI behind the agency’s strategy and advertising efforts, yet many didn’t see the value of tracking their calls — especially if they didn’t receive a high volume. Though clients often didn’t care about learning precisely where a customer came from, they wanted to know the revenue or sales generated by ads.

The agency’s account managers and paid media specialists were spending about four hours a month manually pulling one-off reports. This time included importing calls from CallRail to HubSpot, listening to calls, merging contacts, and tracking down leads that hadn’t been entered into the tools. But even though the 215 Marketing team worked hard to provide clients with analytics, the reports weren’t always granular enough to tell the whole story of which tactics were working. The team knew there had to be an easier, faster way to provide transparency to their clients. The agency was already using CallRail and HubSpot and knew how effective they could be. Several clients were using HubSpot Sales Hub or CallRail for [Call Tracking](#), with some using only one tool or using both independently of each other. 215 Marketing knew the platforms would work better together and decided to help clients integrate them.

Implementation

Integrating tools for smoother workflows and reporting

The 215 Marketing team now begins new client engagements by explaining the value of integrating CallRail with HubSpot, a widely-used CRM and marketing automation platform. Given that most of the agency's clients rely on HubSpot Sales and Marketing Hubs, 215 Marketing strongly recommends pairing it with CallRail's AI-powered lead and conversational intelligence and real-time reporting features, all available inside of HubSpot.

The CallRail + HubSpot integration allows agency marketers to easily set up and manage clients' marketing and sales workflows. To fully track advertising, many of their clients use CallRail's Call Tracking combined with its Premium Conversation Intelligence™ suite of AI-powered solutions.



Integrating CallRail with HubSpot allows 215 Marketing's clients to set up endless workflows like this:

- 1 When a call comes into CallRail, a workflow creates a deal — or transaction record — in HubSpot and assigns it to the right salesperson for that location or customer. It creates a task to update the contact with information from CallRail.
- 2 A workflow can identify the marketing source in CallRail and update the original source in HubSpot so that everyone has the best, most current marketing analytics to track ROI.
- 3 Dashboards can be set up to show deals created by day, source, value, etc. to see which sources generate leads and revenue.
- 4 Call flows direct clients' customers to the right next steps, let managers listen to calls, and allow the agency to determine if calls are qualified.

Transformation

Quality data in real-time

To successfully track advertising and improve results, 215 Marketing needed to more easily see the complete attribution picture. Because manual reporting was so time-consuming, some information was outdated by the time clients could act on it. Now, the CallRail and HubSpot connection allows 215 Marketing to delve into any aspect of client analytics at any time. With the **CallRail + HubSpot integration**, 215 Marketing and their clients can now see relevant data in real-time, and this level of transparency increases trust with clients.

Without having to switch between tools, the integration allows the 215 Marketing team to quickly see the most important information. They now have easy access to:

- Campaign and attribution data to see what's driving calls, texts, and form submissions
- Visibility into conversion status, lifecycle stage, recent interactions, and campaign ROI
- Automations for lead creation and updates to existing contacts
- Tools to configure call flows, qualify leads, and evaluate campaign performance
- Customer communication — including call recordings, summaries, and sentiment — within HubSpot

Mikayla explained, “[The integration] helps us from an optimization standpoint. If we start a campaign, listen to calls, and see that a lot of spam calls are coming through, we know very quickly that we have to make adjustments, rather than having to wait for a biweekly or monthly meeting to get that feedback from clients.”

“[Real-time reporting] has also helped with client insight and perspective because they feel like we're making changes a lot faster and not just waiting for them to tell us something's wrong. We're just able to do that proactively.”

—Mikayla, Growth Marketing Manager at 215 Marketing



Outcome

Better insights and relationships

CallRail's integration with HubSpot has allowed 215 Marketing to access real-time reporting, streamline attribution, automate workflows, and improve analytics. Their team can easily see how prospects move through the sales funnel, and access attribution data, customer communication, and workflows all in one place.

Advantages of the integration include:

- Two-and-a-half to three hours a month saved on reporting
- Increased lead volume
- Reduced cost-per-lead because all leads are now reported in the system
- Proof of how the agency's advertising and strategy decisions are helping clients
- Less time spent responding to client data requests
- Transparency into the value provided by the agency's services and expertise



“We can see a breakdown of those sources day over day, week over week, month over month to see where we are really generating the most leads.”

–Mikayla, Growth Marketing Manager at 215 Marketing

In the short term, the integration of CallRail + HubSpot has helped 215 Marketing more efficiently analyze attribution and make proactive campaign adjustments. In the long run, the integration has helped them build trust with clients and increase client lifetime value.

**Unlock insights for your agency clients
with the CallRail + HubSpot integration.**

[Sign up for a free CallRail trial](#)

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